FORESTRY OUTLOOK STUDY FOR AFRICA

Report of the East Africa Technical Workshop
6 -8 November 2000, Nairobi, Kenya

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS
AFRICAN DEVELOPMENT BANK
EUROPEAN COMMISSION

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Background

1. The Forestry Outlook Study for Africa (FOSA) has been initiated to provide a long term perspective of forestry development in Africa, and more particularly to identify the scenarios and options for the sector in the context of the various economic, social, environmental and technological changes. The study will analyse the forces shaping the future of African forests and forestry, outline the likely scenarios of development in the forestry sector to the year 2020, and indicate policy, program and investment options available to the countries in order to influence the development of the sector to enhance its contribution to the well-being of the people of Africa. During April 2000, a planning meeting of the FOSA focal points from the East African countries was held at the Economic Commission of Africa, Addis Ababa, Ethiopia during which the overall plan of FOSA was discussed and agreed upon.

2. During the Addis Ababa planning meeting, the proposal for preparation of country outlook paper and its structure and contents were discussed and agreed upon. The responsibility of preparing the country outlook paper was taken by the country FOSA focal point with the help of a country working group. Partial financial support was provided by FAO through TCDC contract, but most of the responsibility and resources came from the focal organizations in the countries, in particular the Forestry Departments. When the first draft of the paper was ready, it was considered appropriate to bring all the country FOSA focal points together to share the findings and to learn from the experience of other countries. It was also felt that such a meeting would help to share ideas and methodologies on identifying the future outlook and thus help to improve the country outlook paper.

3. Accordingly, the FOSA Technical Workshop for the Eastern Africa sub-region was held at the Nairobi Safari Club Hotel, Nairobi, Kenya during 6 – 8 November 2000. FOSA focal points from 6 countries, namely Djibouti, Eritrea, Ethiopia, Kenya, Tanzania and Uganda attended the workshop. Prof. Fred Owino and Dr. John Kaboggoza supported the workshop as resource persons and guided the discussion. The agenda of the workshop and the list of participants are provided as **Appendices I** and **II,** respectively.

Objectives

4. The objectives of the technical workshop were to: (a) share the findings from the draft country outlook papers, specifically focusing on the future scenarios for the forestry sector in 2020; (b) exchange ideas, concepts and issues relating to outlook studies and understanding more about outlook methodologies , (c) discuss key issues relating to the development of sub-regional FOSA paper and (d) discuss the approach to refining the country outlook papers and providing additional relevant information in support of preparing the sub-regional outlook paper.

Opening Session

5. The opening session was chaired by Prof. Fred Owino, African Academy of Sciences. Mr. M. Mutie, Acting Chief Conservator of Forests, Forest Department, Kenya welcomed the participants. Specifically he drew attention to some of the current problems like the severe drought in Kenya and its implications on agriculture and industrial sectors. Increasingly water is becoming a critical resource requiring that forestry pay more attention to issues like management of watersheds. He also drew attention to the role of forestry in poverty alleviation and how the sector needs to reorient itself to address some of the emerging social and environmental concerns. Also he drew attention to the need for involvement of stakeholders in decision-making and implementation of forestry initiatives.

6. Mr. D. Gustafson, FAO Representative to Kenya welcomed the participants and highlighted the significance of the meeting as a means of sharing experience from the different countries and

weaving the country experience into a regional framework. He indicated that many of the problems in the sub-region are common and FOSA provides a good opportunity to see them in a long term perspective. He drew attention to FAO's efforts in partnership with other organizations like the European Commission to support initiatives in the forestry sector in Kenya and their significance in the context of some of the current problems in the sector.

7. Mr. Giacomo Durazzo, the EC Representative underlined the EC's concern regarding the environmental situation in Africa, and in particular the state of forests. Specifically he noted that the life support system, especially water, soil, biodiversity and atmosphere, is under severe threat from human actions requiring changes in human behaviour as otherwise the situation will worsen. It was noted that environmental degradation is particularly affecting the poor and that resources like water, which were taken for granted are becoming increasingly scarce and polluted. Specifically he drew attention to the EC's partnership programmes with FAO providing necessary support for FOSA.

8. Mr. C.T.S. Nair, Senior Forestry Officer, provided an overview of the FOSA process and the progress made since the Addis Ababa planning meeting in April 2000. In addition to outlining the FOSA framework and the linkages between different component activities, Mr. Nair explained the scope of the country outlook papers and how they will form an important basis for preparing the sub-regional outlook report. Further, it was emphasized that, apart from helping to provide a long-term view of the developments in the forestry sector and the emerging opportunities, FOSA strives to adopt a participatory process to develop a collective vision as also to improve the country capacity in long term perspective planning. He outlined the objectives of the workshop and how it is structured to accomplish them.

Session 1 – Presentation of country outlook papers

9. The first day of the Workshop was entirely devoted to the presentation of the country outlook papers and discussion on some of the key issues relating to the changes taking place in the forestry sector as outlined in the papers. Each of the FOSA focal point outlined the approach adopted in preparing the country outlook report and then indicated some of the key issues relating to changes in the sector. Important findings from the country outlook papers are summarised below:

Ethiopia

10. Ethiopia is primarily a subsistence economy and almost entirely dependent on land. The population which is estimated as 63 Million in 1998 is expected to grow to 102 million in 2000 and the population density will increase from 57 to 93/Km2. Almost 50% of the population is below the poverty line. Further agriculture is the mainstay of livelihood. Although Ethiopia has moved from a centralised planning framework to a decentralised system and there has been considerable economic liberalisation, the opportunities for diversification are limited. While the overall policy framework is satisfactory, the capacity and commitment to bring about changes are far from satisfactory. While the national institutions dealing with forestry continues to be weak, there has been very little effort to improve the capacity as also to develop strong institutions at the provincial and other sub-national levels.

11. This presents a rather non-optimistic scenario with regard to future forestry development in the country. Increasing pressure on land, especially in the most densely populated central highlands will lead to drastic reduction in the natural forests. It is also noted that the current agriculture practices are unsustainable, and the resultant degradation enhances the pressure on the remaining forests. Most of the conversion will take place in the South and South West. Investment in forest plantation development is unlikely to meet the increased demand, since the annual rate of plantation establishment is only 12,000 ha. Income generated by the forestry sector is not reinvested as it is used in other sectors. By 2020 the total area of plantations is expected to be not more than 500,000 ha.

12. By 2020 the demand for fuelwood, the most important source of household energy is expected to reach about 100 million m3, but the annual allowable cut will be not more than 9 million

m3. It was pointed out that unless significant policy and institutional changes are brought about, the scope for improving the situation is very limited. Of particular importance is the uncertain land tenure situation that inhibits any long term investment in land. It was also noted that the forestry has a low profile in the government system, that it is just a team within a Department and is unable to take any decision even on technical matters. It was pointed out that the Ethiopian Forestry Action Plan, prepared 6 years ago is still to be implemented. Although a draft forest policy has been prepared, again this is yet to be discussed, integrated and finalised for want of efforts from other sectors.

Kenya:

13. The Kenyan country outlook paper was presented by Mr. David Mbugua Dy. Chief Conservator of Forests and two other members of the country working group joined to elaborate some of the issues. Mr. Mbugua briefed the meeting on the process adopted for preparing the country outlook report, including the establishment of a working group, literature review and assigning the task of preparing the different sections of the report to a task force. It was noted that the scenario of forestry development is changing on account of a number of economic, social and institutional factors. Of critical consideration is the weak political commitment for sustainable forest management, weakening of existing institutions, continued excision of forests and plantations, degradation of forests especially in the drier tracts due to a variety of pressures, including grazing, conversion to agriculture, illegal charcoal production, etc. In the more productive uplands the conflicts between agriculture and forestry are intensifying, largely due to growth of population and lack of alternative opportunities.

14. Of the positive developments, the most important is the increasing role of farm forests, which is already supplying a substantial proportion of timber and pole requirements. The outlook for future wood supplies will largely depend on developing an enabling environment for farm tree planting and improving efficiency in wood processing. It was also noted that considering the slow growth rate of the economy, continued dependence on land, weak institutions, continued dependence on wood fuels, etc. the public forests will continue to deteriorate. This will have a serious impact on the protective functions of forests. It was noted that the much needed policy and institutional changes are not taking place for various reasons and this could have long term adverse effects.

Eritrea:

15. The Eritrean country outlook paper outlined the past and developments in forestry, the present situation and what should be done to enhance the role of forests and forestry to the well-being of the people. It was noted that the liberation struggle lasting 3 decades have created a very challenging situation, with low forest cover, weak institutions, inadequate policies, etc. The country is fully engaged in a programme of rebuilding the economy giving considerable thrust to ensuring food security and enhancing the basic amenities. Considerable effort is being made to mobilise people's participation and to take advantage of the latent capabilities at all levels. As a newly independent country there is considerable determination and commitment to improve the situation.

16. There are however a number of issues to be considered in improving the forestry situation and to identify a future scenario for the development of the sector. As regards the change drivers the paper specifically discusses the need for development oriented land tenure system, resolution of conflicts arising from increased demand of land for agriculture and animal husbandry, forest fires, demand for wood energy, financial and human resources, etc. The paper outlines a number of recommendations specifically aimed to remedy some of the problems.

17. While there is strong political commitment as also grass root level involvement for improving the situation, there are several issues to be considered in defining the future scenarios for the forestry sector. One important issue will be appropriate changes in land tenure to ensure security to encourage investment in land improvement, including planting of trees. Much of the emphasis of tree planting in Eritrea will continue to be focused on meeting the demand for fuelwood and poles as also to protect the environment, especially to control and mitigate the effects of desertification and improve the watersheds. Considering the limited financial resources, the indications are that more thrust will have

to be given to participatory approaches. The paper outlines a number of recommendations, but it is important to identify possible scenarios giving due consideration of what is likely to be implemented in the next two decades.

Uganda:

18. Uganda presents a situation of emerging opportunities and challenges. The key driving force is identified as population growth, which estimated currently at 2.9% per annum will result in a total population of nearly 37 million by 2020. The economy has been growing rapidly at an average annual rate of over 6.5% during the last 10 years and the main question with regard to the future scenario will be whether such a high growth rate will be sustained in the next two decades and to what extent the economic structure will undergo changes. Among the positive trends is the significant reduction in poverty and the continued commitment in this direction as reflected in the Poverty Eradication Master Plan. The government has also developed a Plan for Modernisation of Agriculture, which, while extending the area under cultivation will also encourage diversification, especially through farm forestry.

19. Uganda has also initiated far-reaching policy and institutional changes and it is difficult to visualise how the changes will impact on forestry during the next two decades. One of the most important changes relate to decentralisation of administration under which all the key development activities will be the responsibility of district and local bodies. Another important institutional change under consideration is the transformation of the Forest Department into a more flexible and autonomous Forest Authority. There are also considerable thrust on promoting community involvement and encouraging private sector involvement in forest and tree management. All these indicates that if the transition is managed effectively and capacity developed at all levels, the forestry scenario will be different than what they are today.

Tanzania:

20. Tanzania, in comparison with other Eastern African countries is better endowed with forest and woodland resources which covers an area of over 33 Million ha. In 1998, the government has adopted a new forest policy giving considerable emphasis to the environmental values of forests, especially protection of watersheds, biodiversity and soil fertility and underpinning the importance of active stakeholder participation. The four focal areas of action are (a) forest land management, (b) forest based industries and products, (c) ecosystem conservation and management and (d) institutions and human resources. In pursuance of the provisions of the forest policy, efforts are under way to prepare a National Forestry Programme, which is expected to be ready by February/ March 2001.

21. One of the key area of change that forestry has to adapt is the process of decentralisation of government under which most of the administrative responsibilities are being transferred to the district levels. Although Tanzania has a long experience in decentralised management and community participation, it was noted that current capacity at the district level is extremely weak. Involvement of local communities and private sector is on the increase and this is expected to play a critical role in the development of forest resources in the future. It was noted that considering the growth of population forest degradation is expected to continue. Wood will continue to be an important source of energy and although at an aggregate level demand will be within the total supply, imbalances in the distribution of population in relation to supplies will result in acute shortages in certain areas. An important potential area of development is non-wood forest products, especially honey and beeswax. It was noted that various issues relating to the changes in the next two decades have to be more clearly specified and the different scenarios developed taking due account of the impact of the various change factors.

Djibouti:

22. Djibouti is a low forest cover country with an estimated area of 22000 ha of forests and woodlands. Although it is a highly urbanised country with rural population accounting for only 25% of the total, land use is extensive with nomadic pastoralism as the most important land use. With a

cattle population of nearly 1 million, the adverse impact on forests on account of severe grazing pressure is very high.

23. Although the country paper has not outlined all the change drivers and their combined impact on forest cover, the preliminary assessment indicates a continued decline in the forest cover in the next two decades. Further analysis is required to give a clearer picture, specifically considering the demand and supply for forest products although all the indications are that Djibouti will continue to depend on imports for most of the forest products, in view of the very limited area of forest and woodlands.

Discussion on key issues emerging from the country outlook papers:

24. Based on the various country presentations, the meeting identified some common trends that are likely to affect all the countries and outlined their probable implications on forestry in the next two decades. Key themes discussed are summarised below:

Land dependency:

25. In all the 6 countries participating in the workshop, there is a high dependency on land and land use is dominated by subsistence cultivation. The growth of other sectors, namely industrial and services, has been of limited impact in providing opportunities for income and employment and consequently land will continue to be the main source of livelihood of people. Even when industrial development takes place, it will primarily consist of agro-processing and hence all the indications are that at the current level of population growth , land use conflicts will persist reducing the area under forests. Animal husbandry is an important land use and a critical source of livelihood for a substantial proportion of the people and large tracts of land are used for nomadic grazing. Often there is direct conflict between settled cultivation and grazing as also grazing affects forestry in a number of ways.

26. Linked to land use is the tenurial issue, which is currently unfavourable for long term improvements. In countries like Eritrea and Ethiopia existing tenure systems under which right to use communal land changes every 5 to 7 years positively undermines incentive for land improvement, including tree planting. Where there is certainty of tenure there are very positive developments with regard to tree planting, as noted in the case of Kenya and Uganda. In Kenya although there has been significant decline of forests including plantations, farm planting has increased enormously such that it forms the main source of wood supply now. It is expected that in countries like Kenya, Tanzania and Uganda farm forestry will become the most important source of wood during the next two decades.

Policy changes:

27. In the recent years many countries have initiated changes in forest policies incorporating environmental and social concerns. However, often implementation of these policies lags behind and there has been inadequate efforts in this direction. A major problem related to forest policy implementation is the fact that forestry is assigned a low priority and policies in other sectors seldom take cognizance of their impacts on forestry. This seems to be the situation in all the countries. Policies relating to agriculture, industries, transport, energy, etc. are formulated and implemented without any consideration on their impacts on forestry. Intersectoral coordination is thus a critical limiting factor and invariably forestry has not been able to make a strong case at higher levels of decision-making. This situation is unlikely to change in the immediate future and therefore "progressive forestry policy statements" maynot mean much on account of the inability to implement them.

Institutional changes:

28. A key feature of the forestry sector in most countries in the sub-region is institutional changes in various forms. Decentralisation of administration is being pursued by all countries as an integral part of the social and economic policy aimed to promote wider participation of people. It was

noted that in the absence of capacity at the provincial, district and local levels, decentralisation could have negative effects on forests. Efforts are also underway to promote local level participation through joint forest management and community based management. These are in the early stages of implementation and it may take some time to assess the efficacy of these arrangements and the feasibility of their wider application.

29. Another important area of development is the increasing involvement of the private sector in forestry and there is discussion on privatisation of government plantations. However, still there is inadequate experience in this regard. Nevertheless, in the long term it is expected that private sector involvement will increase largely decided by the commercial profitability of forest plantations. Considering the fact that mot countries are implementing economic liberalisation policies which will enhance imports of forest products, long term prospects of private sector involvement will depend on their comparative advantages.

30. In most countries the forest administration has become weaker on account of the absence of timely changes in the structure and functions of forestry organizations. In most cases forestry departments have very little political leverage and the sector gets a low priority for resource allocation. Often the structural adjustment programmes have undermined the technical capacity of the forestry departments. In some cases efforts are underway to transform forestry departments into more responsive, autonomous and flexible organizations like forest authorities. Such transitions however often encounter considerable resistance.

31. It was also noted that in many cases the forestry services are being marginalised and their capacity for effective management eroded. Often restructuring process is taking a long time and the half-hearted measures are often very costly in the long term.

Wood energy:

32. In all the countries in the sub-region, wood is the main source of energy and it will continue to be so in the next two decades. There is no prospects for a significant shift towards commercial energy in view of the high costs and the low investment. In many countries, increases in tariffs of commercial energy have resulted in increased dependence on biomass fuels. Even urban areas depend on wood energy, especially charcoal, and in many countries increased urban demand has led to deforestation in areas that are easily accessible and around the urban centres. It was also noted that wood fuel is still largely a low value product, largely collected by households from public resources and the economic returns tend to be low discouraging tree planting for wood fuel production.

Urbanisation and its impacts:

33. In all the 6 countries in the sub-region, the urban population is increasing rapidly, causing severe direct and indirect environmental stresses. With urbanisation there is an increase in demand for wood, especially for charcoal and construction material. There is also the need to improve the urban environment and some countries have initiated efforts for urban planting.

Demand-supply gaps

34. It was noted that demand for wood and wood products is outstripping the sustainable level of supplies in all the countries in the sub-region, although no realistic estimates are available on the actual consumption as also the level of sustainable supplies. Nevertheless, it is evident that a substantial proportion of consumption is met through depleting the growing stock. Although investment is taking place in tree growing, firstly it is far below what is required, and secondly most of it caters to the market demand.

State of technology:

35. In all the countries, the forest industries sector is dominated by traditional industries, especially saw milling. Low investment in the industry, which has been attributed to a number of

factors like uncertain raw material supplies, limited markets, poor access to credit, etc. has led to the continuation of outdated technologies. Further many of the processing units operate at the low-end of the value addition spectrum. While there is some compulsion for adoption of improved technologies, largely stemming from the changes in the source of raw material (from natural forests to plantations and farm forests), whether such changes will take place or not will depend on a variety of factors.

Forestry's contribution to GDP:

36. It was noted that in all the countries forestry is not receiving the required attention from policy makers and planners, especially as regards allocation of resources. This was largely attributed to the low contribution of forestry to GDP, which is due to the low valuation of products and services from forests. While the need for improved valuation was recognised, it was also noted that the importance assigned to forestry and in particular its environmental services is largely dependent on awareness as also the state of economic and social development.

Group Discussion

37. After the presentation of country outlook papers and the ensuing discussion participants undertook three group exercises specifically focusing on the emerging changes in the forestry sector in the Eastern African countries. The issues subjected to discussion and the overall outcome of the exercises are indicated below:

Factors influencing change:

38. The discussion on factors influencing future change focused on identifying the following:

- Developments in the forestry sector that have become important during the that 10 years;
- Developments that are likely to remain important during the next 10 to 20 years; and
- Recent developments that are likely to have a significant impact during the next 20 years.

The participants specifically noted that issues like (a) increased concern about climate change, (b) growing importance of non-wood forest products, (c) institutional arrangements for benefit sharing like community based forest management, decentralisation and increased thrust on private sector participation, (d) increased opportunities for networking and communications, (e) growing emphasis on protection of biodiversity, (f) thrust on eco-system approach to management of forest resources and (g) formulation of new forest policies and related developments are important changes during the last 10 years influencing forestry in the sub-region.

39. Among the above the participants identified (a) growing importance of non-wood forest products, (b) continuing emphasis on changes in institutional arrangements including community based forest management and increased emphasis on privatisation, (c) continued priority being given to biodiversity conservation, and (d) growth of information technology as elements that will continue to be important during the next two decades. It was also noted that cross-sectoral linkages between forestry and other sectors will determine how forestry develops in the next two decades.

40. Of the issues that are likely to become important in the next two decades, the participants indicated (a) advances in technology, including biotechnology, (b) structural changes in the economies and (c) human resources development as key areas to be considered as having significant impact on the forestry sector.

Discussion on selected issues:

41. A follow up round of group discussion focused on certain questions relating to the development of the forestry sector, relevant to most of Africa. The list of questions is attached as ANNEX III. Two groups for formed, the first group taking up discussion of the issues 1 to 11 and

the rest by Group II. Some of the conclusions emerging from the group discussion are summarised below:

- Deforestation is expected to continue in the Eastern African countries, especially since non-land based sectors and activities are unlikely to grow significantly to absorb the growing population;
- HIV/ AIDS infection will have a direct impact on account of the decrease in the number of skilled labour available for forestry operations. It will also cause a serious strain on the economy at the country level and the household level on account of the increased demand for resources to take care of those infected by HIV/AIDS;
- Economic diversification is unlikely to take place to the extent to make a significant impact of reducing deforestation during the next two decades;
- East Africa will continue to be a producer of primary products whereas Southern Africa will be able to strengthen its capacity as a wood processing region, largely because of the well-developed industrial capability of South Africa.
- Structural adjustment programmes have marginalised the forestry sector and the budgetary constraints have reduced the ability of the forestry services from playing their due role in forestry development.
- Value addition remains still low and as such there are no indications of any change in the immediate future, largely due to poor skills and the limited access to improved technologies;
- Products like Gum Arabic are important for Africa as a whole, but there has been very little attention to producing value added goods, limiting the economic gains from such products.
- Certification and labelling will become critical if Africa has to maintain its traditional wood markets in Western Europe, but some of the emerging markets are less concerned about certification;
- The handicrafts sector provides a lot of opportunities for rural employment and income , but there is an urgent need to improve marketing, develop standards, and improve the skills of artisans;
- As regards the energy scenario, the participants noted that there will be no significant shift away from wood as the major source of energy, especially since the alternative sources are limited, more costly and not easily available, except in the case of some countries where there is potential for production of fossil fuels;
- While the region has a high potential for development of eco-tourism, realising the potential depends on improved security, enhancing infrastructure, human resource development and more effective marketing;
- As regards the emergence of a strong private sector in forestry, especially in tree growing, enabling conditions are not in existence in most countries and there are no incentives to invest in forestry. Future of private sector involvement will largely depend on favourable policies, including a level playing field. As such it is difficult to speculate how the situation will evolve in the future;
- Community based forest management is still in the early stages of development and it is rather too early to say how it will develop in future and whether it will make a significant impact during the next 20 years;
- Most countries have embarked on a process of decentralisation of administration. While this is important to promote grass root level involvement, success of this will largely depend on enhancing the human resource capability at the decentralised levels and strengthening the process of participatory decision-making and transparency;
- The scope for any increase in domestic investment in forestry is only modest and there is unlikely to be any increase in the public sector outlay, especially on account of the low priority assigned to the sector in the overall programme of investment;
- Much of the foreign direct investment will continue to be in harvesting and processing and until the issue of land tenure is sorted out it is unrealistic to expect outside investment in forest plantations;
- The opportunities for taking advantage of CDM for strengthening forestry in Africa is at best short term and depends on several factors including Africa's comparative advantage in relation to other regions. One should not expect a significant flow of funds under CDM.

- The science and technology base of African forestry is very weak and for a long time to come Africa is likely to continue to depend on technology developed elsewhere on account of the weak science base and the very low investment in science education and research.

Characterising the present and future situation:

42. The participants undertook another set of group exercise aimed to visualise the current situation and the expected situation in the year 2020. The aim was to outline the present situation through a set of characteristics relating to forests, institutions and technologies, the direction of change of the different elements by 2020 and the probable causes of the changes. The characteristics/elements identified for assessment relating to forests were forest cover, resource status, ownership, thrust area of management, status of plantation forestry including productivity, sustainability of natural forest management, main types of products and services, main markets and their size, size of external markets, state of technology, extent of trade of forest products as a proportion of production, demand/ supply gaps with regard to important products, share of forestry in GDP and investment in forestry as a proportion of GDP. Of the institutional changes, the elements considered for characterising the present situation were capacity and ability of national forestry organization, structural set up of forestry agencies, community participation, private industry involvement, involvement of farmers, role of provincial governments, role of district and local bodies and involvement of civil society. Elements to characterise the technology situation included application of relevant technologies for sustainable forest management, state of plantation technology, management of non-wood forest products, agroforestry/ farm forestry technology and information/ communication technology. The working groups articulated their perception of the changes and the ensuing discussion helped to clarify the various issues.

Field visit

43. The Kenya Forest Department organized a field trip on 7 November afternoon to the Kikuyu escarpment (dryland forests), Kinali forests (shamba system), Kamae forests *(Acacia meransii* plantations and bamboo forests) and Keni forests (tea plantations and indigenous forests). The visit provided an opportunity to understand the problems in Kenya and to continue the discussions in the field based on what can be seen on the ground. Along the Kikuyu escarpment facing the Rift Valley, a variety of land use conflicts are evident, most notably involving nomadic pastoralists, settled cultivators, charcoal producers as also those who are interested in protecting forests for watershed values.

44. In the Kinali and Kamae forests, which are located in a very densely populated zone, the pressure to convert forest land for agricultural uses is very intense. One probable scenario could be the conversion of a large chunk of the forests, including plantations, in the highly productive uplands to agriculture, unless of course watershed protection is given a high priority. Maintaining the watershed values, which is becoming critical in view of the recent water rationing in Nairobi and other urban centres, would require active involvement of the local people and it may be necessary to develop mechanisms for compensation for foregoing certain land use options by local communities.

General discussion

45. Prof. Fred Owino, FOSA Consultant for Eastern Africa and Dr. John Kaboggoza, Member FOSA Expert Advisory Group facilitated further discussion on the various issues emerging from the country presentations as also the group discussion. Specifically the following issues were brought up for discussion.

- In Eastern Africa the increasing population pressure will be felt in the areas where population densities are already high. For example both in Eritrea and Ethiopia most of the population is concentrated in the fragile highlands and in such a situation the environmental consequences of population increase will be more severe than would be apparent from the average population

density figures. This will require more desegregated analysis to identify the future scenarios as a consequence of population growth.

- With declining soil fertility and the limited ability of farmers to adopt intensive high input agriculture, more land is likely to be cultivated to meet the basic food requirements of the rapidly growing population. Farmers have no choice but to resort to environmentally degrading land use practices including shifting cultivation with short or no fallow periods. Accelerated land degradation in the uplands, while undermining food security also results in detrimental downstream consequences, more importantly reduced supply of water during the summer months. This trend is of particular concern in Eritrea, Ethiopia and Kenya.

- So far none of the countries in the sub-region has elaborated comprehensive national energy policies, which address both the supply and demand aspects of household fuelwood consumption. There are no long-term strategies to address demand issues, including energy substitution, use of more energy efficient devices. Most countries have no control over the bulk of supply of fuelwood and charcoal as most of it is in the informal sector.

- All countries in the sub-region face difficult challenge of adjusting to social changes and growing proportion of the population is being marginalised for a variety of reasons. Traditional land use and tenure systems are no longer compatible with present day farm production practices and demands. This is particularly the case of Eritrea and Ethiopia, where traditional land tenure systems pose major limitations for modernisation of agriculture.

- The growing gap between the rich and the poor in all the countries in the sub-region is another important social factor to be addressed. Rather than addressing the fundamental issues relating to landlessness, countries often resort to easy short-term options like settling the land-less in forest state forest lands, ignoring the long term consequences.

- A number of countries have introduced far-reaching market liberalisation policies, encouraging trade of agricultural commodities. Parallel to the market liberalisation policies is the emergence of preferential trading blocks with common trading policies, which will significantly affect regional trade in agriculture, forestry and other commodities. For Eastern Africa, the 14 country COMESA is fast moving towards zero-tariff trading in defined commodities among the member countries and it is important to assess its direct and indirect impact on the forestry sector.

Conclusion and Recommendations

46. The workshop facilitated an in-depth discussion on the issues relating to the development of forestry in the sub-region based on the draft country outlook papers as also the group discussion. Based on this all the participants realised the need to revisit the draft country outlook paper, and provide a revised version taking due account of the issues discussed. It was agreed that the revised country outlook paper would be provided by 30 January 2001.

47. Prof. Fred Owino will function as a coordinator for networking among the country focal points and it was agreed that the country focal points will provide necessary information required to prepare the sub-regional outlook paper.

48. Networking of the focal points will continue beyond the preparation of the country outlook paper and the sub-regional outlook report. Details of the modalities were not discussed, but possibly could be worked out in due course.

ANNEX I

AFRICAN FORESTRY AND WILDLIFE COMMISSION

FORESTRY OUTLOOK STUDY FOR AFRICA
(FOSA)

TECHNICAL WORKSHOP FOR EASTERN AFRICA

Venue: Nairobi Safari Club Hotel, Nairobi, Kenya

Agenda

Sunday 5 November 2000

- Arrival of participants.

Monday 6 November 2000

0900 – 1000: Opening Session
- Welcome address: Mr. M. Mutie, Chief Conservator of Forests
- Statement by FAO: Mr. D.J. Gustafson
- Statement by EC Representative: Mr. Giacomo Durazzo
- Briefing and recapitulation of FOSA process: Mr. C.T.S. Nair

1000 – 1030: Coffee break

1030 – 1230: Presentation of FOSA country outlook papers and discussion
- Ethiopia (Mr. Million Bekele)
- Kenya (Mr. David Mbugua)

1230 – 1400: Lunch

1400 - 1530: Presentation of country outlook papers and discussion
- Tanzania (Mr. Isaya Mnangwone)
- Eritrea (Mr. Hadegu Ghebrendrias)

1530 - 1545: Coffee break

1545 – 1700: Presentation of country outlook paper
- Uganda (Mrs. Charlotte Kanabahita)
- Djibouti (Mr. Mohamed Moussa Ibrahim)

1700 - 1800: Discussion on key issues emerging from the country outlook papers

Tuesday 7 November 2000

0830 – 1015: Briefing on outlook methodologies
Forest typologies and assessing future developments (Group Exercise)

1015 – 1030: Coffee break

1030 – 1215: Scenario planning exercise (Group Exercise)
Issues relating to future development of forestry in Africa

1215 – 1300: Lunch

1300 – 1900: Field trip to Rift Valley forests

1930 – 2130: Dinner

Wednesday 8 November 2000

0830 – 0930: Scenario planning exercise (Group Exercise)
Issues relating to future development of forestry in Africa, (Cont.)

0930 – 1030: Group Exercise on future situations

1030 – 1100: Coffee break

1100 – 1230: Follow up action including networking
Support for developing the sub-regional report

1230 – 1400: Lunch

1400 – 1500: Provisional outline of the FOSA East Africa Outlook Report
Discussion

1500 – 1530: Conclusions and recommendations of the workshop and follow-up action
Closing session: Statements by:

- FAO Representative
- Prof. Fred Owino
- Dr. John Kaboggoza

1530 – 1600: Coffee break

Thursday 9 November 2000

- Departure of participants

ANNEX II

FOSA SUB-REGIONAL TECHNICAL WORKSHOP FOR EASTERN AFRICA
Nairobi, Kenya, 6 – 8 November 2000

LIST OF PARTICIPANTS	
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* FOSA National focal points

ANNEX III

FORESTRY OUTLOOK STUDY FOR AFRICA (FOSA)

SOME KEY QUESTIONS/ISSUES FOR DISCUSSION IN THE CONTEXT OF IDENTIFYING FUTURE SCENARIOS OF FORESTRY DEVELOPMENT IN AFRICA

(Draft for discussion and comments)

The Forestry Outlook Study for Africa (FOSA) is designed to provide the future scenario / scenarios with regard to the development of forestry in the Region. Although the focus is on the broad pattern of development for the Region as a whole, considering the fact that forestry development is integral to the overall socio-economic development, one should expect considerable differences between countries. Even sub-regional focus will be misleading in the sense that the initial conditions obtaining in the countries within a given sub-region are different and the development path will be determined by a number of country-specific social and economic factors. Nevertheless, in providing regional and sub-regional overviews as also to facilitate developing outlook papers at the country levels, there are several common questions that will help to define the probable future scenarios. A provisional list of issues/ questions that may be considered for discussion are provided below:

Demographic and economic changes:

1. Impact of population growth and urbanisation on forestry in Africa. Average annual rate of growth of population in Africa during 1995-2000 is estimated as 2.36%. Although this is expected to decline to about 1.94% during the period 2015 –2020 the population is estimated to increase to 1,186 million in 2020 from the present level of 783 million. Are we likely to witness a significant decrease in forest cover on account of this? Will there be significant structural changes in the economies such that the pressure on forests will be to some extent mitigated?

2. Recent studies on the impact of HIV/AIDS suggest that several countries would face a number of problems on account its impact on demography, life expectancy, availability of skilled labour and increasing cost of healthcare. What are the possible impacts – direct and indirect- of AIDS on forestry?

Deforestation:

3. What will be the scenario for deforestation in Africa by 2020? Between 1990 and 1995 the deforestation is estimated as 3.748 mllion ha. Will this trend continue, decline or accelerate? Which are the countries where deforestation would have been reduced/ arrested/ reversed by 2020?

4. Will there be diversification of the economies that dependence on land will decline to such an extent that deforestation would also decline? Will the existing resource use pattern, and the demographic changes permit this?

Economic liberalisation and globalisation:

5. What will be the impact of economic liberalisation and globalisation on forestry in Africa? Will this perpetuate the traditional role of Africa as a producer of raw material and not as a processor?

6. What are the comparative advantages of the African forestry sector which will enable it to play a key role in the development of the countries?

7. What has been the impact of structural adjustment programmes on forestry? Considering the fact external debt has been a major constraint in enhancing investment, what are the possible direct and indirect impacts of reducing debt on forestry?

Role of Africa as a producer of wood and share in global trade:

8. Will Africa emerge as an important forest products producing region by 2020? What are the opportunities for the emergence of such a scenario? Or which of the countries/ regions have the potential to emerge as leading producers of tropical timber? Among the five regions in Africa, which are those having considerable potential to emerge as leaders in wood production and processing?

9. What are the opportunities for Africa to emerge as a major net exporter of forest products? And under what conditions?

10. Certification and labeling of forest products is emerging as critical especially in determining access of forest products to certain markets. Will certification and labeling expected to become widely adopted in Africa? What are the emerging scenarios in the context of changing direction of trade? What are the factors that will encourage widespread use of certification and are these factors likely to become important in the next two decades?

11. Africa has a strong traditional forest products-based handicrafts sector. There is also a growing furniture industry. What are the opportunities for developing these further in the context of emerging market opportunities and improvement of technologies? Will it be possible for African handicrafts and furniture producers to tap this niche market?

Shifts in the use of forests:

12. Currently fuelwood and charcoal forms the most important produce from the forestry sector and most of it is collected from forests, wastelands and agricultural lands, largely dependent on natural regeneration. Will there be any significant shifts from wood fuel to other sources of energy or will there be increasing commercialisation of wood fuel to encourage public and private investment in wood fuel plantations?

13. In a number of countries, eco-tourism centred on national parks and game reserves has emerged as an important activity. What are the long-term potentials for eco-tourism in Africa? What are the conditions under which eco-tourism could become an important activity?

Institutional changes:

14. Many countries in Africa are bringing about institutional changes in forestry, especially through enhancing private sector involvement. Privatisation of forest plantations under the forest departments has been pursued in a number of countries. What are the conditions under which privatisation could enhance investment in forestry?

15. What is the experience of community based forest and tree management in Africa? What are the lessons that can be learned from these? Under what conditions community based approach is sustainable? Which are the countries and situations where community based management will find wider acceptance and under what circumstances it will be less relevant? Could we expect a significant increase in the role of community initiatives in forestry in Africa?

16. Many African countries are in the process of decentralisation of administration, empowering the provincial, district and local level organizations in development administration? What are its implications on forestry? Will the local level organizations be in a position to implement sustainable forest management?

Investment in forestry:

17. What is the scope for increased foreign investment in the forestry sector in Africa? Will this be centered on (a) harvesting and (b) processing or will there be an increase in reforestation and afforestation?

18. What is the scope for increased domestic investment in forest conservation and management? Considering the present condition of the economies, could we expect significant public sector outlay on forestry?

19. What are the opportunities for Africa to tap funds under CDM in support of forestry development? Is this likely to be an important source of funding or will it be a short-lived phenomena with only marginal impact? What are the comparative advantages of Africa in getting a large share of the CDM funds?

Role of science and technology:

20. What are the directions of development in science and technology in forestry in Africa? Is there sufficient/ adequate investment to facilitate the generation of scientific knowledge appropriate to the needs of Africa? Will forestry in Africa be driven largely by the internal science and technology capability?

21. What is the probable impact of developments in information technology in Africa? Will it make any significant difference in forestry or such impacts will be only marginal? What will be the possible impact of information technology on forestry? Specifically what are the areas there is considerable potential for its application? Or will information technology will percolate to a small section of the urban, well-to-do people and remain inaccessible to the majority, perpetuating the "information-divide" that already exists.