

Report for AF&PA

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February 2000 Report

**Rupert Oliver
rupert@forestindustries.info**

“INFORMING THE SUSTAINABLE WOOD INDUSTRY”

VAT Registered No: 746311248 – Registrar of Companies for England and Wales Company No: 4689869

Head Office: The Little House • 18 Church Street • Settle • North Yorkshire • BD24 9JE • United
Kingdom

Tel: +44 (0)7553 346410 / www.forestindustries.info

Technical Consultant to the AF&PA Trade and Environment Programme in Europe

Technical Report for February 2000

Highlights

The major event in February was the finalisation of the Pan European Forest Certification Scheme (PEFC). The approval of rules and procedures for chain of custody certification and use of the logo has paved the way for PEFC labelled wood to enter the European market place in the spring. The pace of development is such that the volume of PEFC certified supplies to the European market should rapidly overhaul those of the Forest Stewardship Council (FSC). Meanwhile, an International Forest Industry Roundtable Working Group met to finalise an action program to develop an "International Mutual Recognition Framework System", with the ultimate aim of linking the various national forest certification schemes together under one umbrella. Major decisions relating to international government policy were also taken during February. Possible negotiations towards an international forest convention were put firmly on hold, but governments decided to establish a new forum to co-ordinate the numerous international forestry initiatives.

1 Meetings

Three significant international meetings were held during February 2000:

- First, the Intergovernmental Forum on Forests met for the fourth and final time at UN headquarters in New York to decide on the future development of international government policy with regard to sustainable forestry. The outcome of this meeting is described below.
- Second, the International Forest Industry Roundtable held a working group discussion on the possible development of an international framework for mutual recognition of forest certification schemes. The outcome of this meeting, which may be critical to the eventual shape of global certification frameworks, is outlined in Section 3 below.
- Finally, the Pan European Forest Certification Scheme (PEFC) held their General Assembly in Luxembourg. Major issues for discussion were possible PEFC recognition for three Nordic forest certification schemes, and the rules for PEFC verification of chain-of-custody and use of the PEFC logo. The results of this meeting are reported in Section 2.

Fourth Session of the Intergovernmental Forum on Forests (IFF4)

The 4th session of IFF, which operates under the auspices of the United Nation's Commission on Sustainable Development (UNCSD), was held at UN Headquarters in New York. More than 100 governments met to discuss the future of international forest policy. Agreement was reached on the need for a permanent intergovernmental forestry forum, but delegates decided against immediate negotiations towards a legally binding Global Forest Convention.

Delegates agreed to create a permanent UN forum to coordinate international forest policy. The forum would meet at least once a year with a view to improving implementation of existing treaties and other global accords affecting forests. Unlike the IFF, the new United

Nations Forum on Forests (UNFF) will not be under the UN Commission on Sustainable Development (CSD), but rather under ECOSOC (the higher body of CSD).

Delegates remained divided over a Canadian-led initiative to encourage immediate negotiations towards a fully fledged international forestry convention. Canada gained support from a wide variety of nations, including Russia, Malaysia and francophone African countries. They were opposed by a coalition including the United States, Switzerland, New Zealand, India, and Brazil. Internal divisions dulled the European Union's voice. Key members, including the UK, were opposed to the EU's official pro-convention line.

After an all-night session delegates agreed they would "consider" within five years "*recommending the parameters of a mandate for developing a legal framework on all types of forests.*" Both sides claimed they were satisfied with the outcome. The U.S. State Department declared themselves satisfied with the final text, having balked at earlier drafts that would have committed Washington to treaty negotiations. However Canada's director general of international environmental affairs, told participants they were moving "*towards that legal framework for which Canada has worked for so long.*" Canada now seems set on building political momentum for a new treaty to be launched at an inter-governmental environmental convention planned for 2002 (RIO+10) to mark the tenth anniversary of the 1992 "Earth Summit".

Environmental groups continued to campaign against a forest convention at IFF4, claiming it would sanction under international law existing logging practices which they regard as dubious. They also claim resources would be diverted from existing accords. For example Greenpeace note there are 40 international bodies dealing with forestry in some form and at least 20 treaties that touch on the issue. Environmental groups seemed satisfied with the agreement to develop the UNFF, particularly as the text included relatively strong language to promote "multi-stakeholder dialogues" allowing structured input by non-governmental groups.

In addition to discussing a possible forest convention, delegates considered a wide range of "proposals for action" to promote sustainable forestry agreed by the Intergovernmental Panel on Forests' (the forerunner to IFF). They considered the steps that should be taken to monitor progress in implementing these proposals. Also discussed were: the transfer of financial resources from North to South; trade and environment issues; and the international exchange of environmentally sound technologies to support sustainable forest management. The Forum succeeded in reaching a consensus in all these areas. Proposals for action agreed at IFF4 must now be submitted to the eighth session of the UNCSD to be held in April 2000.

2 Development of certification in Europe

2.1 PEFC approves Chain of custody procedures in Luxembourg

Chain of custody validation procedures and rules for the use of a logo were approved at the Pan European Forest Certification Scheme (PEFC) Third General Assembly in Luxembourg on 25 February (copies of these rules and procedures are attached). Official participants at the General Assembly were the representatives of PEFC member organisations from 15 countries. The PEFC has now established all the elements required for the scheme to become fully operational. The PEFC product label will be available to the market as soon as the first national PEFC certification scheme has been endorsed (see below).

PEFC's chain-of-custody rules allow for product certification using three models:

- the “percentage input/output model” which allows a percentage volume/weight of labelled product output based on the percentage volume/weight of certified raw material input;
- the “minimum average percentage model”, in this case the total volume of output product can be labelled when the volume/weight of certified raw material input exceeds the set minimum average threshold. In the PEFC scheme the minimum percentage is 70 % by volume or by weight for all forest based products (solid wood, assembled goods, pulp & paper, chips & fibre);
- and the “physical segregation model”, involving full separation of uncertified and certified products.

The PEFC logo and product label inform the consumer that a specified proportion of the wood, and of the raw materials used in products, derives from a sustainably managed forest. In addition to use on-product, the PEFC logo can be attached to off-product marketing brochures and other documentation.

Organisations wishing to use the logo must apply to PEFC and demonstrate compliance with the rules. Organisations eligible to apply for logo usage rights include forest owners in possession of a forest certificate; forest industry companies, timber and wood merchants and distributors with a chain-of-custody certificate; national PEFC bodies; and other organisations and interests representing the PEFC.

2.2 Assessment of Nordic PEFC National Schemes

Assessments of the first three applications to the PEFC of national forest certification schemes are now taking place. Independent consultants (Indufor Oy, based in Finland, and Form Ecology Consultants based in the Netherlands) have been nominated to assess whether the national schemes for Finland, Sweden and Norway satisfy PEFC criteria. All interest groups have also been invited to comment on the national schemes and forward these to the consultants. Following assessment by the consultants, the scheme’s may be approved during spring 2000.

All three of the Nordic schemes seeking approval are already operational. Under the Finnish Forest Certification System (FFCS), 13.5 million hectares of forests have already been certified, and the total area is forecast to rise to 22 million hectares by the end of 2000. Over 53 % of Norway’s harvested timber came from forests certified under the “Living Forests” scheme during 1999 and it is anticipated that by the end of 2000 the proportion will reach 90 %. In Sweden, over one million hectares have so far been certified through the LRF Skogsgarna national scheme.

2.3 Other PEFC National schemes

Formerly a concern primarily of the softwood-producing Nordic countries, PEFC has put certification firmly at the top of the Central European forest sector’s agenda. There is now little doubt that very significant volumes of PEFC labeled wood, including hardwoods, will be available from Central Europe by the end of 2000. The following is a summary of the current status of the major national schemes in the region.

2.3.1 PEFC Germany

Development of the PEFC Germany scheme has been led by the German Forestry Council. The scheme is intended to be applicable to all forest ownerships and types in Germany.

Target date for full operation is April 2000. A survey of forest owners representatives undertaken for the scheme indicated that owners of around 7.8 million hectares of German forest (around 72% of total German forest area) intend to work towards PEFC certification. Rigorous procedures for forest certification bodies and their personnel are being developed. Certification bodies must be accredited by the German Accreditation Service (Trägergemeinschaft für Akkreditierung, Frankfurt, Germany). Auditors must pass a specific course on PEFC Germany, and demonstrate specific knowledge of German forestry. Pilot testing of the scheme is underway, and should be completed during March. Two certification bodies have so far been involved in pilot studies: Frankfurt-based DQS has been involved in a pilot project in Thuringia; while Nuremberg-based LGA has been working in Bavaria and Baden-Württemberg. Standards are being developed by the German Forest Certification Council through an open participatory process. There has been broad participation from state, community and private forest owners; labor unions; the timber trade and industry; and professional foresters. Consumer organizations are acting as observers to the process. One environmental organization is involved, but the mainstream groups (including WWF and Greenpeace) have chosen not to participate. Forestry performance measures have been developed to mirror the Helsinki Principles. Certain management elements of ISO14001 are required for certification, but full registration to the ISO standard is not a necessary precondition for PEFC certification in Germany.

2.3.2 PEFC France

Development of the French PEFC initiative is led by the Federation Nationale des Syndicats de Propriétaires Forestier Sylviculteurs (National Federation of French Forest Owners). The scheme accommodates all forest owners, types and regions of the country. Forestry standards are being drawn up through a process of open stakeholder participation. Forestry standards link performance measures developed in accordance with the Helsinki Principles, with the ISO14001 environmental management systems standard. The scheme aims to be operational by March 2000. Certification will be carried out by independent assessment primarily at regional level. Certifiers are being accredited by the French national accreditation agency (COFRAC).

2.3.3 PEFC Switzerland

Switzerland is already operating a forest certification scheme through the "Q-Label" organisation, HWK-Zertifizierungsstelle. This is now being linked to PEFC. Development of the scheme has been through a participatory process involving 16 organisations from the forest and timber sector. The scheme is applicable to all forests and owners in Switzerland. Certifiers are accredited through the Swiss accreditation agency (SAS). The scheme is already promoting a label to the Swiss market and has developed chain-of-custody procedures, involving physical segregation of forest products from certified and uncertified sources.

2.3.4 PEFC Denmark

Development of the Danish national certification system is being led by the Danish Forest Association. 15 representatives from government, forest owner, trade, technical, and environmental organisations have been involved so far. The scheme will cover all forest ownerships and types in Denmark. Target date for full operation is end of March 2000.

2.3.5 PEFC Austria

PEFC Austria are intending to pilot test their scheme in the spring, with a view to full operation during summer 2000. The scheme's target is to ensure voluntary certification of all

forest land in Austria by 2002. The scheme is supported by all relevant interests in the forestry and forest products sector. It also has the support of ÖGNUM, a large environmental umbrella organisation in Austria, and of labour unions. Only Greenpeace has refused to participate. Small non industrial forest ownership is predominant in Austria, so the scheme will aim to certify at a regional level. Certifiers will be accredited by the national accreditation agency based at the Federal Ministry for Economic Affairs. The Ministry is subject to regulation under the Accreditation Law. Accredited certification bodies are likely to be SGS Austria-Control (Certification of Forest Management), and Holzforschung Austria. ÖGNUM - environmental umbrella organisation) and labour union. Forestry performance measures have been developed in line with the Helsinki Principles. Unlike France, registration to ISO14001 is not a precondition for certification, but compliance with the standard would assist organisations seeking certification.

2.3.6 PEFC Belgium

Belgian private forest owners are leading the development of the Woodnet forest certification scheme. Like other PEFC schemes, it is designed to accommodate all forest types and ownerships in Belgium. The target date for operation of the scheme is July 2000. Early projections suggest that 100% of Walloon and 50% of Flanders forest area will be certified under the scheme soon after its introduction. The scheme is likely to involve certification at a regional level, although procedures have yet to be finalised. Discussions are on-going with the Belgian national accreditation agency, Belcert, over procedures for accreditation and recognition of certifiers. Certification standards, also yet to be finalised, are being developed by a Working Group under the auspices of Woodnet, with all interests invited to participate.

3 Development of certification outside Europe

3.1 IFIR report on mutual recognition framework

In New York during early February the International Forest Industry Roundtable Working Group on Mutual Recognition met for the second time. The meeting was attended by 10 industry representatives from the United States, Canada, New Zealand, Sweden, Finland, Brazil, the EU, and the UK. Discussion at the meeting centred on draft proposals for an "international mutual recognition framework system" to link the different programs for sustainable forest management that have been developed independently around the world (see January report). The document, which is currently undergoing final review by the Working Group, is due to be submitted for confirmation by the full IFIR in early April.

The draft document sets out the reasons for the establishment of an international mutual recognition framework; a set of "*guidelines for, and elements of, credible SFM standards and certification systems*"; and a methodology to measure conformance with the guidelines. It discusses possible management and administrative options for mutual recognition at international level. It includes an action plan for IFIR work towards mutual recognition. Proposed activities during 2000 include the convening of an independent expert panel to review the IFIR proposals, and the formulation of "pilot" bilateral mutual recognition agreements by several roundtable participants. A dialogue with the World Bank/WWF Alliance is being developed to facilitate input into the process from a wider range of stakeholders. Full details of the contents of the report and proposed activities will be available following endorsement by IFIR.

3.2 World Bank/WWF Alliance

Some items from the World Bank/WWF Alliance February 2000 Bulletin:

- A report commissioned by World Bank President Wolfensohn found that the 1991 forestry strategy had a mixed record and should be adapted to the changing dynamics of the forest sector and the aspirations of developing countries. The report particularly criticised the strategy's strict bias towards conserving existing forests. This bias discouraged innovative forest management schemes sponsored by local communities and enlightened private interests. The report written by the Bank's Operations Evaluation Department (OED), stated "*the policy has made the Bank wary of getting involved in experiments to improve forest management or to address illegal logging.*" With reference to the World Bank/WWF Forest Alliance, the report went on to say that the 200 million hectare target of certified sustainably managed forest "*deserves more emphasis in a revised forest policy. It offers the potential for 'win-win' outcomes with better yields and more conservation.*" The OED documents can be obtained at: <http://www.worldbank.org/html/oed>
- The UK's WWF 95+Group, has received funding from the World Bank/WWF Alliance to carry out a project designed to advance certification in Ghana. The Alliance has funded a paper comparison of the Ghanaian standard and the FSC system. A workshop is planned for the spring to take the project forward.
- The Alliance is carrying out two inter-related in-depth studies on forest certification and on land restitution to private owners in several Eastern European countries. The aim of the studies is to help countries learn from experiences in neighbouring countries at different stages of implementation.
- The proceedings of a recent Alliance Certification/Verification workshop are now available on the Web at www-esd.worldbank.org/wwf. The Alliance convened a meeting of 80 forestry experts and stakeholders on November 9-10, 1999 to share experiences of certification and verification systems. The website includes copies of all papers and presentations from the workshop.
- The Alliance held a certification Workshop in Slovakia, February 25. With over 40% forest cover, Slovakia is one of the most forested countries in Europe. The Alliance believes that "*certification could provide a means for achieving a better market position while creating a strong incentive to manage forests according to the highest standards.*" The Alliance is funding a WWF project to facilitate trade in certified forest products from Slovakia. The project has identified the existing obstacles to certification. These were shared at the February 25 workshop with Slovakian forest sector professionals and representatives of companies seeking certified timber. Details are available from Zoltan Rakonczay at zoltan.rakonczay@elender.hu

3.3 Indonesia LEI Certification Scheme

Details are emerging of the operation of Indonesia's LEI forest certification scheme. The scheme looks fairly comprehensive on paper. It involves a detailed set of forestry standards and a range institutions designed to ensure independent and transparent forestry audits and broad participation during standards-setting. In a country where recent estimates suggest that around 50 million m³ of wood are "unofficially" extracted each year, reliable certification of forest management may be a particularly significant tool for promoting better practice. However, the challenge of introducing a credible system is particularly pronounced.

LEI's performance standards have been developed through a limited participatory process, taking as their starting point the ITTO Guidelines for Sustainable Tropical Forest Management, and the FSC Principles. The scheme so far accommodates natural forests

owned either by industry or by the state. Development of procedures to certify plantations and community forests will follow in the second phase of the program.

A summary of the LEI scheme is contained in the attached LEI Guideline 99 “Sustainable Production Forest Management Certification System” (SPFM). Currently LEI has responsibility both for the development of certification standards, and for the actual process of auditing forestry operations on the ground. LEI is an autonomous organisation, but works closely with both the Indonesian Standardisation Body and the Ministry of Forestry and Estate Crops. In time LEI plans to drop its direct role in forest auditing, and instead take on the role of accreditation body to assess the professional competence of other independent certifiers. LEI refers to these as “Certification Institutions”. The certification process itself will be divided into 4 stages:

- Pre-field inspection by the first expert panel - essentially to filter out those applicants with no hope of complying with the certification requirements.
- Field Assessment and Community input – a Field Assessor checks forest operations on the ground against the set of certification criteria and indicators developed by LEI. At the same time, information on community attitudes to forestry operations is gathered.
- Performance appraisal and certification decision making – a second expert panel from the Certification Institution evaluates all the information from the pre-field inspection, field assessment and community input. If endorsed by the Expert Panel, the Certification Institute will issue a “Certification Institute Decree” and announce the event in the mass media. To encourage continuous improvement, successful applications are also divided into Gold, Silver, and Bronze, while unsuccessful applications are divided into Copper and Zinc (lowest).
- Surveillance – the Certification Institute periodically monitors the certified unit to ensure continuing compliance.

LEI currently has an agreement with the Forest Stewardship Council to co-operate in the promotion of certification throughout Indonesia. Work is also being carried out to develop procedures for joint LEI-FSC certification using FSC accredited certifiers. Ultimately LEI is looking for mutual recognition between their scheme and FSC.

So far, Indonesian companies performance against the LEI standards has been poor. In the early stages of the scheme’s development, numerous companies applied for LEI certification. Only 16 of these were considered worthy of pre-field inspection, and of these, only 2 companies were able to continue on to the field assessment stage. Only one of these companies eventually passed and received LEI certification. The company has now applied for recertification within the framework of LEI's joint initiative with FSC. While saying little for the quality of Indonesian forest management, the failure of so many Indonesian companies to obtain LEI certification reflects well on the independence of the LEI process.

3.4 Forest Stewardship Council links with non-wood schemes

According to an FSC report, in December 1999, the FSC participated at a meeting in Brussels involving the major international environmental and social organisations involved in standards setting, accreditation and labelling. The other organisations represented included:

- Council on Economic Priorities Accreditation Agency (CEPAA)
- Fairtrade Labelling Organizations (FLO) International
- International Federation of Organic Agriculture Movements (IFOAM)
- International Organic Accreditation Service (IOAS)
- Marine Stewardship Council (MSC)

According to the FSC report, *“the objective of the meeting, facilitated by Falls Brook Centre, a Canadian environmental NGO, was to prioritise the common issues that the participating organisations want to work on together and to decide on a framework for moving forward. The six participating organisations are forming an alliance in order to safeguard and promote environmental and labour concerns within international trade as well as to pursue continuing professional improvement.”*

Among the issues that participants prioritised as key areas for further collaboration are an analysis of accreditation procedures leading to a common framework; a peer review process for accreditation that will enhance the transparency of these organisations; research on the overlap of standards between systems and a strategy for increasing compatibility; development of joint training programs; and further discussions on trademark use and logo proliferation.

4. Market Developments

4.1 Keurhout and FSC Co-operate

The Forest Stewardship Council (FSC) and the Dutch Keurhout Foundation have announced a collaboration designed to allow chain of custody certifications under both schemes through a single audit to avoid duplication of effort and costs. Keurhout is the scheme developed by Dutch industry in association with government to label wood products derived from a variety of national forest certification schemes.

The agreement retains independent decision making, acknowledgement and quality control by both schemes. Certification bodies accredited by FSC are authorised to assess the chain of custody and issue certificates for products from FSC-endorsed certified forests. They are now authorised to include in their assessments and reports some additional items which are required by the Keurhout Foundation. Under the arrangement, an FSC-endorsed chain of custody certificate and report may also include elements designed to satisfy requirements of Keurhout which are not included in FSC requirements, and may be submitted to the Keurhout Foundation for endorsement. After full approval by both schemes, market claims may be made with the trademarks of FSC or Keurhout or both. The collaboration does not imply any institutional acknowledgement between FSC and Keurhout.

4.2 EU study on forest certification impact and the role of government

The EU have released a summary paper of a study commissioned to analyse the impact of forest certification in Europe. The report is designed to advise on the potential role of the EU in the further development of certification. The study was conducted by E. Rametsteiner of Vienna University, whose previous work includes some fairly extensive research into European attitudes on forest certification. The summary report, while a little muddled and contradictory, includes a few insights:

- Rametsteiner suggests that the majority of European consumers (he estimates 60% - although it is not clear how this figure is derived) would be interested in the information provided on labels of good forest management, and that most European forest industry organisations (*“around 65%”* he suggests) believe some form of certification scheme is needed. However European forest owners generally believe certification will neither benefit the environment nor assist them economically.
- His survey suggests that European forest owners believe there has been considerably more demand for product certification schemes (like the FSC), than for process certification or site registration programs.

- Rametsteiner's analysis of European consumer markets, including private and institutional public procurement, suggests certification will not increase overall consumption levels of wood, except perhaps in the case of tropical timber. He notes further that *"the European market is the most advanced market, which means that effects on other markets, such as the US, are likely to be even smaller."*
- He confirms the now widely held view that price premiums for certified wood are unlikely to be significant in the long term. Most certification schemes are not aiming for high value niche markets, but for the mass market instead.
- He suggests that *"the quantitative impact on consumer markets is expected to be small. Much of these findings can be attributed to the fact that the product feature in question, namely the sustainability of forest management, is non-tangible and does not have any physical effects on the consumer. Furthermore, as [our] consumer survey results have shown, the label will have only a limited influence on the image of wood products."*
- The impact of certification on markets will be strongly dependent on *"the communication efforts surrounding certificates"* and will not be a direct effect of the certificate alone. To have any impact, labels must be backed by a concerted marketing effort.
- Rametsteiner interviewed European forest policy experts to assess likely impacts of certification on European forest management. His survey suggested that the overall impact is likely to be limited. High costs and limited financial returns mean that certification is usually only applied to forest areas which are already well managed. Furthermore there may be negative effects, as the higher costs of forest management may mean more areas are left unmanaged. However Rametsteiner notes that the majority of experts believe the overall effect will be positive and that certification will contribute to improved European forestry, although its impact will be slow.
- Some useful figures are provided: certified forests in Europe achieved a potential production volume of certified timber of more than 20 million m³ in 1998, or a potential market share of more than 5% of industrial round wood production in Europe. However, by mid 1999, only about an estimated 0.6 million m³ of certified timber was actually available on the European market
- The strongest substitution effect of forest certification will be to allow a slow reversal of tropical woods' lost market share. However this will have little effect on total European forest product markets due to the small market share of tropical timber. Tropical timber is also likely to substitute non-wood products.
- While the direct impact on forestry practice has so far been limited, the debate over forest certification is bringing about significant changes in European forest policy. In particular it has increased the role of the private sector and other non governmental interests in the development of forest policy.
- After a detailed analysis of the potential contribution of European government in the further evolution of forest certification, Rametsteiner concludes that this role should remain limited. He believes the EU should only support work *"to define voluntary standards or guidelines for certification systems within the framework established by Ministerial Conference on the Protection of Forests in Europe."*

Full copies of this paper can be obtained free of charge from Dr. Ewald Rametsteiner, Institute of Forest Sector Policy and Economics, University of Agricultural Sciences Gregor Mendel Str. 33 A-1180 Vienna, E-mail: e.rametsteiner@lu-vienna.at; ramet@edv1.boku.ac.at

4. Environmentalist campaigns

4.1 Global Forest Watch

The World Resources Institute has announced the introduction of Global Forest Watch, “a major new network and tracking system that uses satellite imagery and ground level observations to improve global knowledge about the state of forests.” To coincide with the announcement, Global Forest Watch released maps and reports alleged “to reveal widespread logging in the forests of the Congo Basin, and extensive mining, energy and road construction projects in the forests of Canada.” The reports included “A First Look at Logging in Gabon”, “Canada’s Forests at a Crossroads: An Assessment in the Year 2000”, and “An Overview of Logging in Cameroon.” The reports and the maps are available online at: www.globalforestwatch.org.

According to WRI “Global Forest Watch addresses the international problem of the lack of transparency and easy access to information”. Over the next five years, the international network is intended to span 21 countries. Global Forest Watch also intends to “identify and promote successful forest management practices; enable governments to better manage their forests; and provide local groups with the information they will need to participate in the management of their forests.”

According to WRI, Global Forest Watch would not have been possible a few years ago. “It is a reality now because of the growth of local citizen’s groups, the expansion of the Internet and other digital technologies and the new partnerships being forged by businesses, governments and environmental groups.” Global Forest Watch has received support from both environmental groups and industry. It currently has 75 partners in seven countries. Software companies such as Environmental Systems Research Institute (ESRI) and ERDAS, and home furnishings company IKEA, have given major donations to support Global Forest Watch.

Rupert Oliver
AF&PA Technical Consultant
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