



Protective plantation managed as a forest park outside Damascus, Syrian Arab Republic

7. Summary and conclusions

The Forestry Outlook Study for West and Central Asia (FOWECA) was undertaken to provide an overview of the emerging state of the forestry sector taking into account the impact of the various driving forces. Specifically, a number of questions were raised (see Box 1.1) on the future roles of forests, woodlands and trees, the state of resources and how countries may enhance the flow of goods and services. This chapter summarizes the key findings and recommendations, answering the questions raised at the beginning of the study.

CHANGES IN THE STATE OF FOREST RESOURCES

The overall forestry situation in the West and Central Asia region in 2020 will largely depend on the proportion of countries in the different scenarios. The situation that may emerge in the next 15 years will be as diverse as it is today, although this will depend on the overall efforts to bring about changes in the economic and institutional fronts. Some of the likely developments regarding forest resources are summarized below.

Forest cover to stabilize and increase in most countries

On the whole, forest cover in most countries of the region is expected to stabilize and improve, mostly because the importance of agriculture (including animal husbandry) as the main source of income and employment is declining. Increasing urbanization and the development of the manufacturing and services sectors could reduce some of the pressures on forests and rangelands as horizontal expansion of agriculture slows down. Afforestation efforts, even though limited, would further help to stabilize and improve forest cover.

Conflict-related instability as a major problem

Continuing conflicts in the region will remain a major obstacle to improving the region's forestry situation. Wars have destroyed woodlands (including windbreaks, shelterbelts and avenue trees) either as collateral damage or as a deliberate act to minimize cover for combatants. Conflicts and consequent instability have undermined the ability of forestry organizations to manage forests and this has encouraged illegal logging in a number of countries.

Degradation of forests and rangelands

While the forest cover situation may stabilize and marginally improve, the degradation of forests and rangelands may persist in a number of countries, particularly those countries with sluggish economic growth, persistent poverty and a high proportion of people dependent on agriculture and animal husbandry. Notwithstanding the

fossil fuel wealth, the rural population in some of the countries will continue to use biomass as a main source of energy. Illegal collection of fuelwood and production of charcoal, which caters to the demand for energy but is also a source of income, is likely to persist, resulting in continued degradation.

ROLE OF FORESTS AND TREES IN THE REGION

Provision of environmental services as the primary objective

Provision of environmental services, as outlined below, will remain the major function of forests and trees in the future.

Arresting desertification. The preponderance of desert conditions prevailing in most of the region would imply that management of forests and woodlands gives emphasis to arrest land degradation and desertification. Protecting agricultural land and habitations from shifting sand dunes will be a major concern.

Afforestation of degraded areas. Land degradation is a major problem in several countries, and in many cases it has been caused by faulty land management practices, including the diversion of water for irrigated agriculture. Arresting further degradation would be a key priority requiring substantial investments in afforestation. Mobilization of resources and building up the necessary institutional and technical capacity to implement an effective programme of afforestation will require particular attention.

Urban forestry. Urbanization and the growth of some of the cities in the region as centres of international trade and commerce will require increased attention to urban forestry, especially to create green spaces for improving the environment and to enhance recreational amenities. Largely this will depend on the growth of income. There will also be situations where unplanned urbanization in low-income conditions could result in destroying green spaces and also degrading forests and woodlands in the adjoining areas.

Recreational use of forests and woodlands. A related priority will be to improve the recreational value of forests. Especially in the context of increased income, tourism, both domestic and international, is expected to grow rapidly, if there are no major instability and insecurity problems. Forests and woodlands will have to cater to the increasing demand for tourism, and efforts will have to be directed to prevent degradation with the increase in visitor pressure. The problem of increased recreational pressure is already evident in some of the countries and steps are necessary to make recreational use more environmentally friendly.

Conservation of biological diversity. Protecting the biodiversity in the region will be another priority. The region has 5 of the 32 global biodiversity hotspots and hosts a number of unique species of plants and animals. While most countries have

established a network of protected areas, considerable scope exists for improving their management. Weak institutional capacity has led to illegal hunting, especially in some of the Central Asian countries. While managed trophy hunting could generate income to local communities, currently trophy hunting is unorganized, and in many cases existing rules and regulations are not enforced nor is the income accruing to local people.

Declining importance of industrial wood production

With the exception of a few countries, the role of forests and trees in the production of industrial wood will be very limited. Even some of the countries where wood production was a key objective, this has declined in importance with provision of environmental services gaining primacy. The very low proportion of area under forests and other wooded land and especially the low productivity from unfavourable environmental conditions make wood production economically unviable.

Rapid increase in the demand for wood and wood products

The consumption of wood and wood products is likely to increase in the entire region, especially owing to the population growth, urbanization, increases in income and changes in lifestyles. During the next 15 years consumption is expected to grow at an average annual rate of 3 to 4 percent for sawnwood and 4 to 5 percent for wood-based panels and paper and paper board. Faster growth (in relative terms) is expected in Central Asia, whose economies have recovered in recent years. Currently, the region is a net importer of forest products, exceeding about US\$12 billion (in 2004), and this is likely to double in real terms during the next 15 years. West and Central Asia will remain one of the most important net global forest product importing regions, largely because of its extremely poor resource base.

The scope for enhancing raw material supply from within the region is extremely limited and most of the demand will be met by increased imports from outside the region (mainly Europe, including the Russian Federation, followed by Southeast Asia). Some of the countries that are strategically located and have a large domestic market (for example, the Islamic Republic of Iran and Turkey) will be in a better position to develop forest industries based on imported industrial roundwood. The declining profitability of the wood industry in Europe could further speed up relocation of industries, to the advantage of some of the countries with low cost labour, stable investment climate and access to wood supplies. Although most countries may not have any natural advantage in producing wood, they may still be in a position to develop wood industries through their competitive advantage.

Demand for woodfuel to decline

Substitution with fossil fuels will reduce the overall demand for woodfuel in most countries. However, in a number of countries fossil fuels remain out of reach to some segments of the population, especially in the low-income groups. Collection of wood and production of charcoal will remain important sources of income for the

rural poor. Furthermore, in many countries charcoal use is expected to increase, as traditional cooking has become a status symbol. While most of the demand will be met through imports, there will also be increasing pressure on forests and woodlands. Legal restrictions are in place in some countries, but because of institutional weaknesses they have not curtailed illegal charcoal production.

Constraints in implementing sustainable forest management to persist

Although there may be some increase in forest cover, the ability of most countries to implement sustainable forest management will remain limited. This largely stems from policy and institutional weaknesses and, more importantly, the low level of investments. Even countries that are economically better off have not been able to build up institutional and technical capacities. Public-sector forestry organizations are poorly developed and continue to focus on law enforcement rather than actively promoting and facilitating the involvement of other stakeholders in the management of forests and woodlands.

OPTIONS AVAILABLE TO IMPROVE THE SITUATION

The priorities and strategies will differ between the countries depending on the current and emerging economic and institutional scenarios. As the overall economic and institutional environment changes, the demand for forest products and services and society's ability to provide them will undergo changes. While existing and future scenarios may result in very different demands on the forest sector, similarities would enable the adoption of common approaches in addressing the problems. Accomplishing sustainable forest management is a long-term goal for all countries, and the overall priorities and strategies will be somewhat similar. Such a broad framework could accommodate the conditions specific to the different countries and areas, and the priorities and strategies could be elaborated more precisely depending on the specific situation.

Overall priorities and strategies

Emphasis on environmental services. Considering the current environmental situation in the region – the arid and semi-arid conditions, the high level of desertification, declining agricultural and rangeland productivity, land degradation, loss of biodiversity, increasing water stress – provision of environmental services will be the most important concern for almost all countries. With the increasing proportion of people living in urban areas, improving the urban environment will continue to be another priority for a number of countries. Use of forests for recreational purposes – e.g. ecotourism – is another growth area, especially in view of the growth of domestic and international tourism.

What precisely should be given importance largely depends on the specific ecological conditions and the economic situation. For example, in many countries (most countries in the Arabian Peninsula, Afghanistan, Armenia, Iran and Turkmenistan) control of desertification, including sand-dune stabilization, will



Use of forests for recreation and ecotourism is an area of growth: cedar forest reserve, Lebanon

be a priority. In several countries with mountainous topography, watershed management will be the most important objective. This will be particularly important in some of the countries where water is harnessed for irrigation and electricity generation (for example Iran, Kyrgyzstan, Tajikistan and Turkey).

Integrated approach to resource management. Considering the overall state of forest and tree resources in the region and the continuum of different land uses, accomplishing the objectives of management – whether the provision of environmental services or the production of wood and other products – warrants an integrated approach to resource management. This would imply that forestry will not be able to exist as a distinct sector, but that forestry concerns would be integrated with other land uses, especially agriculture and rangeland management – mainstreaming aspects such as growing and managing trees into all land uses.

Policy and institutional adaptations. The focus on provision of environmental services and the need to adopt an integrated approach to resource management would necessarily imply making substantial improvements in the policies and institutional arrangements relating to land use in the region. Traditionally, forest policies have largely focused on areas that are under the control of public-sector forestry agencies (State Forest Funds, as in the case of many former Soviet Republics). An increase

or decrease of goods (wood and non-wood products) and environmental services is often dependent on land that is not designated as forests. Adoption of an integrated land-use approach requires more broad-based policies, going beyond the domain of forests. Furthermore, many of the environmental problems such as the loss of biodiversity, desertification, soil erosion and watershed degradation stem from inappropriate use of agriculture and rangelands.

The formulation and implementation of policies for integrated land management requires that countries have more broad-based institutions. Revamping public-sector forestry agencies, which currently play a dominant role, will require a re-examination of the core values, functions and structures and to make appropriate changes. Public sector forestry agencies will have to work very closely with other sectors, especially agriculture, animal husbandry, urban development and tourism. The increasing role of the private sector, community groups and civil society organizations provides new opportunities for the provision of goods and environmental services. Collective action with other governmental and non-governmental agencies will require redefining the roles and responsibilities of each and developing appropriate policy and institutional frameworks. In some cases this would require substantial re-invention of existing institutions.

Subregional, regional and international collaboration. Ecological contiguity of countries and the similarities of the problems underscore the importance of intercountry collaboration at different levels. Sharing of information and technology and undertaking joint initiatives are particularly important to reduce costs and to enhance the effectiveness of resource management initiatives. Subregional and regional collaboration is particularly important in addressing problems such as fire and pest and disease incidence. The management of transboundary protected areas will particularly require stronger intercountry collaboration. Resource assessment, education, research and training are other areas that could significantly benefit (especially as they reduce costs) from subregional and regional collaboration.

Scenario-specific priorities

Differences in the current and emerging economic and institutional environment necessitates that countries fine-tune their priorities and strategies to make them relevant to the specific scenarios.

Struggling to achieve development. Countries passing through the “struggling to achieve development” scenario face substantial economic and institutional problems and, therefore, the priorities and strategies will have to acknowledge them. Severe financial and human resource constraints will be of particular concern. Forestry is unlikely to be a high-priority sector. The overall approach under this scenario could be summarized as “build up from the base” and focuses on the following:

- meeting people’s basic needs sustainably;
- building up local institutional capacity;

- improving and adapting local-level technologies and upgrading skills;
- focusing on less resource-demanding investment options.

Unbalanced development. Although the resource situation is more favourable under this scenario, the rapid growth of a dominant sector (one that generates most of the economic surpluses) undermines the economic viability of the other traditional sectors. Production aspects of forests and forestry are unlikely to get much political attention. In addition, wood production will be economically less attractive in view of low productivity and the high real costs of inputs like water. Furthermore, the favourable economic situation provides an easy option of imports. Priorities and strategies will have to be designed taking this into account. Countries facing this scenario will have to focus on a strategy of “improve fundamentals and change direction”, which involves the following components:

- encouraging pluralistic institutional arrangements;
- improving the role of public-sector agencies as facilitator in support of development of other institutions;
- increasing investments in upgrading technologies and skills.

Balanced development. Countries under this scenario are in a relatively better position because of their balanced economic and institutional development. However, they operate in a highly globalized environment in that their economies are closely intertwined with that of other countries. Policy processes and legislation will have to comply with regional and international agreements and take into account the perception of stakeholders outside the country. The participation in regional economic cooperation bodies such as the European Union implies the need to be more competitive and efficient. Policies relating to energy, agriculture and the environment at the regional level will have significant influence and it will be necessary for countries to adjust and adapt to the changing policies and legislation in these areas. Strong external linkages also increase the competition in both domestic and external markets and this would necessitate continuous scaling up of the quality of products and services provided. The overall approach under this scenario can be summarized as “keep moving forward”, with the focus on:

- maintaining vibrancy of institutions and their adaptability;
- investing in human skills to improve efficiency and competitiveness;
- focusing on unique and high-value products and services.

FOLLOW-UP WORK

The next 15 years will witness significant political, economic, social and environmental changes in the region, especially as countries become more integrated into the world economy and new opportunities and challenges emerge. Undoubtedly, environmental issues will be at the forefront of policies relating to natural resource management. At the same time, a number of countries will have to continue addressing poverty and make the best use of natural resources

to tackle development challenges. Priorities and strategies need to be designed taking into account the overall economic and institutional constraints. The broad priorities and strategies outlined under the different scenarios are indicative, and they need to be elaborated and refined at the country level. The following are some of the areas for follow-up.

Strengthening national forest programmes

The Forestry Outlook Study for West and Central Asia provides a broad indication of the emerging opportunities and challenges and outlines the overall regional and global context of forestry development. Inevitably this involves some generalization and it is important that country-specific efforts are made to refine and adapt the findings. The national forest programmes provide a unique framework to take on board the findings of FOWECA and to elaborate them based on in-depth assessment of the specific situation.

Institutional improvements

FOWECA has clearly indicated the need for substantial strengthening of institutions dealing with forests and forestry in the region. In many cases existing institutions have failed to adapt to the overall changes and thus their ability to address current and emerging issues has been undermined significantly. Weaknesses are widespread in almost all institutions, including government forestry agencies, research organizations and educational and training institutions. There is, therefore, a strong case to review the institutional frameworks and where necessary to reinvent them to address the emerging challenges.

Capacity building in strategic planning

Although forestry is a long-term investment, the ability to develop and implement long-term strategic plans in the sector is poorly developed. The outlook process has made some effort to remedy this. However, substantial country level efforts are required to improve the capacity to undertake strategic planning, taking into account intersectoral linkages and visualising the long-term changes outside the sector. This is all the more important in the context of adopting an integrated approach to land and natural resources management.

Improving the information base

An important issue in improving strategic planning in the forest sector is the poor state of information on forests and forest products and services. Most countries in the region have not been able to provide recent information on the area under forests and other wooded land, the condition of forests and growing stock, as well as with production, consumption and trade of forest products. Although environmental services from forests are becoming important, here again information on biophysical and economic aspects of their provision is very poor. Improved planning for the development of the sector requires addressing this weakness.

Review and updating

A major challenge for all outlook studies is the change in the various assumptions that form the basis of the analyses. The complex interaction of the driving forces and the long time horizons enhances the uncertainties. Scenario analysis helps to some extent to identify the uncertainties and explore the implications of alternative paths of developments. However, there are several factors that could change in less predictable directions. This necessitates that planners and policy-makers understand the changes and reassess their implications on a regular basis.