



**FORESTRY DEPARTMENT**

**AUTO-EVALUATION OF  
FORESTRY SECTOR OUTLOOK STUDIES  
(Programme Entity: 243A1/ 242A3)**

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Forest Products and Economics Division, Rome

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## EXECUTIVE SUMMARY

### INTRODUCTION

1. Since 1996, FAO has implemented the Programme Entity “Forestry Sector Outlook Studies” resulting in a number of global and regional forest sector outlook studies (see Box 1) to help improve national forest programmes and to enhance the information base for improved policy formulation and strategic planning in the sector at different levels. Their main purpose is to provide an indication of the emerging opportunities and challenges and thus to facilitate appropriate responses to enhance the contribution of the sector for sustainable development. Broadly speaking, outlook studies contribute in three main areas:
  - a. National policy development and planning;
  - b. International policy dialogue on forests; and
  - c. Investment planning.

#### BOX. 1: KEY OUTPUTS OF FAO FORESTRY SECTOR OUTLOOK STUDIES

##### Global Outlook Studies:

- Global forest products consumption, production, trade and prices: Global forest products model projections to 2010;
- The global forest products model: Users manual and guide to installation;
- The global outlook for future wood supply from forest plantations

##### Regional outlook studies

- Asia Pacific Forest Sector Outlook Study;
- Forestry Outlook Study for Africa;
- Latin America Forestry Sector Outlook Study (completed – report to be reviewed and printed)
- European Forestry Sector Outlook studies ( completed – report to be edited and printed)
- Forestry Outlook Study for West and Central Asia (work in progress)

2. The forest sector outlook studies directly contribute to FAO’s Strategic Objective E2 (Regular assessments, analyses and outlook studies for food and agriculture).The main beneficiaries of the programme entity would be forestry policy makers and other stakeholders, especially those concerned about developing forest policies. In addition, investors, owners and managers in the forestry sector will benefit from this work, especially through having better information about future trends in the sector to base their decisions accordingly.

### AUTO-EVALUATION

3. In response to the Director-General’s Bulletin 2001/33, the FAO Forestry Department undertook an auto-evaluation of the Programme Entity 243 A1 “Forestry sector outlook studies”. This entity was created in the PWB 1996-98, was updated in the framework of the Medium Term Plan 2002 – 2007 and reformulated as 242 A3 during the MTP 2004 – 2009. The evaluation covers all the global and regional outlook studies undertaken during the period 1998 – 2004, but excluded the State of Forests Reports, which has also been an integral part of the Programme Entity until PWB 2004-05.

## **METHODOLOGY**

4. This auto-evaluation has largely followed the approach outlined in the guidelines issued by PBEE in November 2003. In undertaking the evaluation, substantial effort was made to assess the views of the users of the outlook studies (see Box 2). Information gathered through questionnaire surveys, targeted interviews, citation studies, etc. provided the basis for internal reflection and analysis. An early draft of the main conclusions and recommendations was circulated among those involved in implementing the outlook studies, and the report was revised on the basis of the feed back.

### **BOX. 2: ASSESSMENT OF THE OUTLOOK STUDIES**

1. An internet survey was undertaken in which interested persons were encouraged to respond to a questionnaire either by directly from the FAO website or through E.Mail. The auto evaluation questionnaire was distributed to 863 persons in over 70 countries. In all 246 persons responded to the questionnaire survey and these were tabulated and analysed.
2. A telephonic interview of opinion formers and experts was undertaken by an outside expert to assess their view of FAO outlook studies. Over 25 persons responded and their views were analysed and a report was provided by the consultant.
3. A web-site survey of citations of forestry outlook studies were undertaken to assess the extent to which FAO outlook studies are referred to in various publications. Hitherto a total of 100 citations to the forestry outlook studies have been found. The context in which the outlook studies has been cited has been analysed to assess the use of the outlook studies.
4. More than 40 staff members in FAO, in HQ and in regional offices, were interviewed to assess their perception and use of the outlook studies.
5. The outlook studies page in the FAO Forestry website received on average of 49 hits per week, of which is higher than the average hit for all the sites.

## **MAIN CONCLUSIONS**

### **Accomplishments**

5. On the whole the programme has been implemented effectively resulting in a series of outlook studies providing the global and regional perspectives for the development of the forest sector. Although there have been some minor slippages in terms of target dates in completing the studies, all the outputs envisaged in the PWB and the MTP have been produced and a number of high quality reports have been delivered. Both the global and regional outlook studies have helped to demonstrate FAO's leadership in this important area. The forestry sector outlook studies have also formed the basis of broader initiatives like "Agriculture towards 2015/2030 and the NEPAD's "Comprehensive Africa Agriculture Development Programme".
6. Most respondents to the questionnaire survey indicate that the outlook studies have been extremely useful to understand the trends and outlooks in the forest sector. In the process, substantial awareness on the concept of outlook has been created, often through regional and sub-regional meetings and workshops. Informal networks created in the process have directly and indirectly helped in sharing information. Although not explicitly stated, FAO outlook studies have helped to underscore the importance of adopting a long-term and broader perspective in the forest sector. It is however difficult to assess whether these have led to important changes in the approach to forest sector planning, especially considering the diversity of the conditions and the fact outlook information is just one of the several components of decision-making process.

### **Quality of outputs**

7. Feed back from the users of the outlook studies suggest their satisfaction with the various outputs. Of the sample of 246 respondents of the internet questionnaire survey 89% rated FAO forestry outlook studies as good or very good and only 3% rated them as poor. Eighty four percent of the respondents indicated that FAO forestry sector outlook studies have enhanced their knowledge of emerging forestry issues. Most of those responded to the internet questionnaire survey indicated that no other organization, public or private, is providing such broad-based informative studies and most have urged that FAO continues with the production of regional and global outlook studies.

### **Clients of FAO forestry outlook studies**

8. The main clients of the forestry sector outlook studies seem to be largely academic and research institutions and to a lesser extent government and other public sector organizations. The former accounted for over 40% of those responded to the questionnaire survey while 24% belonged to the government and other public sector organizations. Non-governmental organizations and consulting companies are other important clients. The fact that only 3% of the respondents were from intergovernmental organizations, is a cause of concern, especially in view of the influence of these organizations in supporting country level initiatives.

### **Process of outlook studies**

9. All the outlook studies have been implemented with substantial involvement of the key stakeholders. In the case of the various regional outlook studies, the Regional Forestry Commissions have played a lead role in guiding the process. The precise approach however varied depending on the specific circumstances. In any case there has been significant involvement of the countries, especially in the case of the regional outlook studies. In the case of Africa, Latin America and West and Central Asia, substantial efforts were made to prepare country outlook papers, largely through country focal points/ consultants. Substantial opportunities were provided to country focal points to enhance their understanding of outlook studies and to share their experience through regional and sub-regional meetings and seminars.
10. In addition to the country outlook papers, a number of thematic papers addressing topical cross-cutting issues were prepared involving experts from the region. Expertise from within and outside FAO was tapped through internal and external advisory committees. Other stakeholders especially regional organizations, including development banks, international donor agencies, etc. also participated in the outlook process. Draft outlook reports were discussed in the Regional Forestry Commissions and the comments and suggestions were incorporated before the final reports were disseminated.
11. All the outlook studies have been implemented adopting a judicious mix of quantitative and qualitative analyses, largely determined by the issues addressed and factors like availability of reliable data. Where appropriate, as in the case of some of the global outlook studies, substantial efforts have been made to use econometric models for projections drawing upon the best available expertise in the field. There are however situations where qualitative approaches are more relevant as in the case of some of the regional outlook studies. For example, in the case of the Forestry Outlook Study for Africa there has been substantial thrust on aspects like policy and institutional aspects that are less amenable for econometric modelling. Also reliance on econometric models would be misleading in the context of the poor data quality. Most readers of some of the regional outlook studies are interested in understanding the broad prospects and how various driving forces are impacting the development of the sector, rather than getting precise figures on a limited number of indicators.

## **Relevance**

12. Interviews, questionnaire surveys, citation analysis and discussions indicated clearly that the outlook studies are extremely relevant in the context of long term strategic planning at various levels. The extent of participation by the countries and other stakeholders is a clear indication of the importance that the countries attach to the outlook studies. The internet questionnaire survey indicated that 92% of the 285 respondents regarded the FAO forestry sector outlook studies as important. And 95% of the respondents indicated that it is important that FAO continue to produce forestry sector outlook studies.
13. A number of respondents made the point that, though they made little direct use of the study, they had benefited from being involved in the process of developing the study for their region. It was also argued that the wide spread of such involvement in the preparation of recent studies had been useful in getting people to think about the issues confronting the forest sector. Those interviewed cited a number of strengths of the FAO outlook studies (see Box)

### **Box 3: Strengths of FAO Outlook Studies**

- FAO deploys an unrivalled forest and forest products database; no other source yet compares with it;
- FAO data and studies have a credibility that others lack (a point made by many) – frequently characterised as unbiased, providing outputs that do not pursue a particular agenda, developed through a transparent process and freely available;
- The forest sector outlook studies provide long term, multi-country analysis not available elsewhere and assemble and present information that would be difficult to access otherwise;
- The outlook studies draw upon FAO's position as the leading world forestry agency and the only one that can effectively place forestry within the broader agriculture and land use

14. Most users indicated that they have no access to other comparable sources of forest sector outlook analysis. Even those working on forest product and forest sector analysis for private industry point out that they largely rely on FAO data, and their studies do not have the same temporal or geographic coverage, face the same methodological problems and are very costly.

## **Extent of use of outlook studies**

15. Survey of citations and interviews with various users suggest that outlook studies are being used extensively. There are two components of the outlook studies, namely (a) an analysis of the current situation and (b) the outlook segment that provide the future scenarios and possible situation in the future. On the whole both the components are used, although it would appear that analysis of the present situation is used more often, especially as a source of information, while the outlook part does not probably get the attention it deserves.
16. Within some agencies and organisations, outlook studies were being used as an input into processes to formulate overall, regional and sub-regional forest sector policies and strategies, or to set targets for particular multi-country programmes and projects. They were also sometimes being used to provide briefing on the situation in individual countries. In a few organisations their use was routine in forest sector operations, more frequently use was confined to particular managers or analysts, and particular programmes.
17. Some organizations engaged in development-related research in the forest sector reported quite extensive use of information from FAO outlook studies (e.g. METLA in Finland, CIRAD in France, Forest Trends in USA). Others cited little or no use (e.g. IIED and ODI in

- the UK). It was unclear whether these differences in levels of use were due to the type of studies respondents had engaged in, or to their familiarity – or lack of familiarity – with the FAO outlook study programme.
18. Respondents from consulting groups working mainly for the private sector proved to be major users of the studies, in particular for assignments requiring multi-country coverage, or/and analysis over relatively long time horizons. Among the uses described was that of helping potential new suppliers understand the functioning of the forest and forest products sector in the major consuming regions, and the requisites for successfully engaging in such markets.
  19. Academic respondents emphasised that the outlook studies provide an important reference and teaching source for courses and texts on world forestry, and feature prominently in university forestry libraries. It was argued that this can impact on a large number of foresters and others concerned with the forest sector. One European academic who has been a principal adviser to his country's forestry aid programme for many years, commented that much of the knowledge about developments in the forest sector that he had been able to bring to the latter resulted from his use of the outlook studies in developing his teaching courses and materials.
  20. Several of the respondents were individuals who feature prominently as speakers and paper authors at international forestry and forest-related congresses and conferences. All identified the outlook studies as being among the main sources that they draw upon.

### **Impact on policies**

21. However, when it comes to the expected outcome of policy changes in the forest sector, it is extremely difficult to establish a direct relationship between outlook studies and their effect in bringing about policy changes. Policy changes are a long-drawn process and it is unrealistic to expect the outlook studies to have a direct and immediate impact. Evidence hitherto however suggests that the outlook studies do percolate to the policy process, often indirectly, though it is difficult to establish a direct cause-effect linkage. Many of the outlook studies have been widely used by academic and research institutions, consultants, governments and the private sector and this has helped to create an overall awareness of the situation.
22. Impacts of outlook studies thus appear to be largely indirect; through the policy documents, consultant and research reports, conference outputs, etc., that are shaped in part by using inputs from outlook studies. As such the impacts are difficult to identify, and even more difficult to measure. Very few respondents managed to identify specific impacts resulting from use of an outlook study.

### **Marketing of the outlook products**

23. This brings in the issue of how the product is produced and marketed. While the need for undertaking global and regional outlook studies are well established (especially since these emanate from the various regional forestry commissions and COFO). However, marketing of outlook studies, especially to those responsible for decision-making outside the forest sector remains extremely weak. There is therefore a need to redesign and market the outlook studies taking into account the needs of policy makers, especially in the ministries of planning and finance and not just those in the ministries dealing with forestry.
24. One difficulty is that most outlook studies have attempted to address the needs of several stakeholders, including policy makers, academic and research institutions, practising foresters, non-governmental organizations, industries and so forth. Addressing the concerns of different players, inevitably results in dealing with a number of technical and economic issues and thus in dilution of focus. This is all the more so when it comes to reaching the key policy decision makers, whose interest is rather limited to the policy implications. FAO need to consider

sharper targeting of the stakeholders, and if the main purpose of the outlook studies is to bring about policy changes, this need to be reflected in the product and the process. Adopting a catch-all approach is attractive, but in terms of making an impact it may be less effective.

25. In addition to making the reports available through internet and in print, FAO uses the sessions of the Regional Forestry Commissions and COFO as means of conveying the findings of the outlook studies. While important, often this amounts to preaching to the converted, while key players whose actions have significant impacts on the forest sector are often unaware of the existence of such studies. This has important implications on the eventual impact of the studies, especially in bringing about more informed policy decisions in sectors that have significant effects on the forest sector.

## **RECOMMENDATIONS**

### **Continuation of outlook studies**

26. Almost all those interviewed and most of those responded to the internet survey questionnaire clearly expressed that FAO continue with the programme on outlook studies at the global and regional level. It was pointed that FAO has a unique advantage, not available to other organizations and the objectivity and neutrality of FAO are very much appreciated. FAO is also in a much better position to provide a cross-sectoral perspective, in view of its wealth of information on the developments in other sectors like agriculture, animal husbandry, etc.
27. In view of the fact that forestry outlook studies directly contribute to the strategic objective of regularly providing information on future trends, it is recommended that this may be established as a continuing programme as is the case with similar programmes in other departments.

### **Improved marketing of the outlook studies**

28. One of the major weaknesses of the outlook studies is that they are not effectively marketed and the existence of the outlook studies are not widely known. There are clear indications that inadequate resources are expended in promoting and marketing the outlook studies. Although outlook studies outputs are communicated through printed reports, internet and some promotion during events like COFO, this is far from adequate to capture the attention of potential users at the decision-making level, especially in the key ministries like planning and finance. FAO should have a clear marketing strategy, which should become an integral part of the production of outlook studies and in some cases it is advantageous to work backwards on the production process.
29. Most products of the outlook studies are not designed to reach key policy decision makers and end use studies indicate that academic institutions are the primary users of the FAO outlook studies. While this may have indirect impacts, FAO need to address directly policy makers if the outlook studies are to have an impact in shaping the future of the forest sector. It is recommended that FAO produces short and succinct policy briefs (1-2 pages) outlining key findings from the outlook studies and their implications on each country.
30. In addition to COFO and the sessions of the Regional Forestry Commissions, efforts should be made to inform broader audience, especially in other sectors. Opportunities provided by the Regional Commissions, meetings of regional and sub-regional economic organizations, etc. should be taken advantage of to inform the findings of the outlook studies. FAO need to adopt a pro-active approach in this regard.

### Enhanced coherence in the outlook methodologies

31. Although FAO has undertaken a number of outlook studies, there are inconsistencies in the approaches between different outlook studies. This largely stems from the inadequate effort to learn from the experience and adapt approaches and methodologies in the subsequent outlook studies. Often the outlook studies are implemented by different people, with widely differing skills and understanding of outlook studies and the exchange of information and experience is often limited. Continuity and consistency between different outlook studies need to be ensured to refine and improve methodologies so that the quality and implementation efficiency are improved continuously. To facilitate this it is recommended that a **core group takes the full responsibility for the design and implementation of all the outlook studies**.
32. There is an urgent need to develop guidelines and manuals on undertaking outlook studies, drawing upon the extensive experience that the Forestry Department now possesses in implementing outlook studies. As such there is a danger that the valuable experience that individuals gain in the process of undertaking outlook studies are not documented and institutionalised. It is therefore recommended that FAO invests sufficient time and resources to develop appropriate guidelines and methodologies in for undertaking outlook studies at the global, regional and national levels.
33. **Establishment of a core group of staff who will be able to undertake all outlook studies would help to substantially reduce the start up time of outlook studies**. In fact there should be a seamless shift from one outlook study to the next, drawing upon the lessons and findings from the previous one. As such there is significant discontinuities in terms of approaches, personnel and time

### Redesigning the methodology of implementation

34. As such considerable time and resources are expended in the preparatory phase of the outlook studies, especially to obtain concurrence and participation from the countries. Informing the countries, getting nominations of focal points from the countries, getting arrangements in place to prepare the country outlook papers, organizing planning workshops to brief the national focal points, etc. consume a substantial time of the participants. However the quality of the country outlook papers, in spite of considerable efforts, is extremely varied and often not commensurate with the efforts expended. The Forestry Department should carefully consider various options to achieve a balanced distribution of time and resources between (a) the preparatory phase, (b) the production phase and (c) the dissemination phase. In many cases the production of the final report and its dissemination receives less attention that they deserve, especially all the previous steps creates a fatigue and much of the effort is directed to complete and close the process.
35. While participatory approaches and processes are important, to ensure ownership of the studies by the stakeholders, here again efforts should be made to strike a balance between the process and the timely production of quality product. FAO outlook studies need to strike an acceptable balance and ensure that under no circumstance quality is sacrificed.
36. One of the problem about the outlook studies is that they become fast outdated, especially in the case of the long term outlook studies with a time horizon of over 10 years. While it is important to provide an indication of the long term scenarios and how society-forest relationship is likely to change over time, it is also important to provide regular updates, and to take cognizance of key shifts from the paths anticipated earlier. These shifts are particularly significant in some of the developing regions/ countries and require regular monitoring and updating. FAO should consider (a) establishing a system of regularly monitoring critical changes in the regions and countries that are particularly likely to have significant

global/regional impact and (b) incorporate the changes to refine the outlook at shorter intervals.

37. During the interval between two successive regional studies, FAO should identify key thematic issues that need to be analysed in depth. To some extent this is being done as is the case of the Asia Pacific region. These thematic studies should focus on key areas that have been identified as important in the regional outlook study and in a way form an important input for initiating the next round of outlook studies.
38. This would require some **changes in the way the outlook studies are managed within the Forestry Department**. Currently outlook studies are undertaken by ad hoc teams constituted for each region as and when the studies are undertaken. This doesn't help to build up core capacity in outlook studies on a long term basis. Now that a complete set of regional outlook studies have been undertaken and much of the work will involve regular updating, the Forestry Department should consider having a different system in place for this task. While a senior officer should be responsible for the overall programme, one officer should be assigned to monitor the developments in each region, in collaboration with the concerned regional forestry officer.

#### **Internal coherence and linkage with other programmes within FO and FAO**

39. Current level of efforts to develop linkages with other programmes in the Forestry Department, especially national forest programmes and forest resource assessment need substantial improvement. Appropriate mechanisms need to be established within FO to strengthen the coordination between the three key programmes namely resource assessment, national forest programmes and sector outlook studies.
40. Within FAO there is considerable potential for synergy with other Departments. In fact the major strength of FAO in undertaking outlook studies in the forest sector stems from the opportunity to take advantage of the enormous wealth of information in key sectors like agriculture. Unfortunately the linkage now remains very weak. Contrary to the intentions, current institutional mechanisms like PAIA-GLOP are not effective in providing a broader focus to the outlook studies. While there is an urgent need to strengthen PAIA-GLOP, other measures, both formal and informal, need to be pursued to enhance collaboration with other departments, specifically to improve the understanding of cross-sectoral impacts.

#### **Updating global demand and supply projections**

41. Notwithstanding the limitations of data, there is a continued demand for information on future demand for wood and wood products and the outlook for global and regional supply changes. This is critical for a wide group of clients including industries, international organizations, governments, etc. Although there are outlook studies by various interest groups (especially by industries) these are partial and seldom address the broader issues. FAO therefore need to invest adequate resources to periodically update the forecast for global and regional demand and supply for forest products and build up necessary in-house capacity to lead the production of such forecasts.

#### **Follow up of outlook studies at the country level**

42. Most often once the regional outlook studies are completed, there are inadequate efforts to take the findings to the country level and to outline how regional and global developments as also developments in other sectors are likely to impact the forest sector in the long term. FAO should make concerted efforts to incorporate the findings from the outlook studies while providing support to countries in implementing national forest programmes as also in developing proposals for support under the TCP.

**Improving forest products information**

43. The strength of the FAO outlook studies largely stems from its information system particularly relating to forest products that covers almost all countries and a number of decades. However, the quality and reliability of information is extremely varied, largely depending on the capacity of the countries to establish and maintain an effective system for collection, processing and analysing information. In many countries formal system in the forest sector is at best under-developed and to that extent affects the reliability of projections in the outlook studies. There is an urgent need to invest in improving the information system in most countries, especially the developing countries.

## **AUTO-EVALUATION OF FORESTRY SECTOR OUTLOOK STUDIES**

### **1. INTRODUCTION**

#### **1.1. Background**

FAO has been in the forefront of providing technical support to countries in the field of forestry for a long time. In addition to addressing specific field level problems, strengthening the overall information system, especially through forest resources assessment and providing information on production, consumption and trade of forest products, has been important focal areas of FAO's forestry activities for a long time. The UNCED and the various post-UNCED international dialogue on forests led to enhanced interest in forestry issues requiring more thorough analysis of the changing society forest linkages. The post 1990 period witnessed a growing concern about the availability of environmental services, in particular conservation of biological diversity, climate change mitigation, control of desertification and conservation of water resources. The period also witnessed an acceleration of globalisation such that the interdependence between countries increased significantly. The rapid expansion of trade in forest products, movement of technology and capital between countries and the growing concern for protection of environment, especially for the provision of global public goods all underscored the need for providing a broader perspective to the formulation and implementation of national forest programmes.

The meeting of the FAO Working Group on Forestry Statistics held in November 1995 highlighted the need for (a) "adding value" to data through the provision of highlights and by producing and disseminating analyzed information and (b) giving more emphasis to regional conditions, trends and highlights. Providing a global and regional perspective of emerging opportunities and challenges was seen as important in the context of the increasing interdependence of countries. It is in this context that FAO initiated more broadly focused outlook studies to provide both quantitative and qualitative information on emerging changes taking into account the various driving forces. In 1996 FAO initiated the study on global forest products trends and the Asia Pacific Forestry Sector Outlook Study. Since then FAO has undertaken regional forest sector outlook studies covering almost all geographical regions. These were undertaken within the framework of the Programme Entity "Forestry Sector Outlook studies" (243 A1), created in the PWB 1996-98 and 242 A3 under the MTP 2004 – 2009.

#### **1.2. Context**

As indicated earlier, the FAO Forestry Department has been implementing a number of critical programmes, especially in the area of improving information on forest resources and forest products and supporting the national forest programmes. Strengthening policies and institutions has been another thrust area of the Forestry Department's work programme. The outlook studies are seen as integrating the wide range of information available within and outside FAO and to provide a long term global and regional perspective that will help countries to formulate better strategies and plans to address the rapid economy-wide changes.

The forestry sector outlook studies are undertaken in accordance with the Strategic Framework for FAO 2000-2015. *Improving decision-making through the provision of information and assessments and fostering knowledge management for food and agriculture* is one of the thrust areas and the forestry sector outlook studies particularly contribute to the following:

*E2: Regular assessments, analyses and outlook studies for food and agriculture; and*

*E1: An integrated information resource base with current, relevant and reliable statistics, information and knowledge made accessible to all FAO clients. (see Box 1)*

**Box 1: Regular assessments, analyses and outlook studies for food and agriculture:  
Strategy components**

- Analysing and assessing the state of, trends in and outlook for nutrition, food, agriculture, fisheries, forestry and related natural resources, wherever possible basing assessments on diversified data sources and carrying them in participation with external partners;
- Identifying and analysing current and emerging issues and drawing them to the attention of the international community; this will include the development of improved indicators for use in assessing progress towards sustainable agriculture and rural development; and
- Facilitating the participation of countries in assessments and outlook studies, including through regional and global information networks and providing technical support to countries in carrying out their own strategic assessments.

Source: The Strategic Framework for FAO 2000-2015

### **1.3. Auto-evaluation**

The auto-evaluation of the Programme Entity 243A1/242A3 “Forestry Sector Outlook Studies” was undertaken in response to the Director-General’s Bulletin 2001/33. The evaluation covers all the global and regional outlook studies undertaken during the period 1996 – 2004, but excludes the State of World’s Forests , which has also been an integral part of the Programme Entity until PWB 2004-05. The auto-evaluation was undertaken primarily as an internal process within the Department with substantial efforts to assess the views of end-users of the various outlook studies. Details of the methodology adopted are described in a subsequent section.

## **2. FORESTRY SECTOR OUTLOOK STUDIES: RELEVANCE TO PRIORITIES AND NEEDS OF MEMBER NATIONS**

### **2.1. Development problem to be addressed**

In order to achieve sustainable development in the forest sector, forest managers and policy makers must have regularly updated analysis including information about future economic, environmental, technological and social trends that will affect the sector and how sustainable forest management can be achieved given the various constraints that many countries face. The need for such analyses has been underscored by the Intergovernmental dialogue on forestry, which has repeatedly stressed the need for improvements in areas such as trade and the analysis of deforestation and forest product supply and demand.

### **2.2. Objectives and rationale:**

The choices made now will shape the future of forests and forestry and the FAO programme of outlook studies seeks to identify the range of outcomes and implications for forestry that may arise from the actions today. The main objectives of the outlook studies are:

- To improve policy and programme formulation in countries through taking into account long term opportunities and challenges of the forestry sector;
- To support international policy dialogue on forests; and
- To enhance the strategic planning capability of the countries.

The main beneficiaries of the programme entity are forestry policy makers and other stakeholders, especially private sector, non-governmental organizations, academic and research organizations and bilateral and multilateral organization. Outlook studies describe how forests around the world might look in the future. An understanding of the broad trends of what is happening in the sector and what factors are driving the changes helps to provide an indication of how the role of the sector is undergoing changes and what may be done to improve the situation. More importantly the outlook studies help countries place their own policy objectives in the wider global and regional context, facilitating better informed national policy development and planning.

### **2.3. Activities and outputs**

As regards accomplishments, the programme has been effective in producing all the outputs as scheduled in the programme of work and budget notwithstanding the delays in the case of some of the regional outlook studies, partly stemming from the substantial effort required to initiate activities in the countries.

Some of the main outputs from the outlook studies are as indicated below:

#### *The Global Forest Products Outlook Study*

The main outputs under the Global Forest Products Outlook Study are:

- Global forest products consumption, production, trade and prices: Global Forest Products Model Projections to 2010, Global Forest Product Outlook Study Working Paper No: GFPOS/WP/01 (published in 1998).
- The global forest products model (GFPM): Users manual and guide to installation, Global forest product outlook study working paper no: GFPOS/WP/02 (published in 1998);
- The global outlook for future wood supply from forest plantations, Global forest product outlook study working paper no: GFPOS/WP/03 (published in 2000)

#### *The Global Fibre Supply Model (GFSM):*

This was initiated in late 1995 to ascertain the future fibre supply situation using a simple forecasting model. The study includes a compilation of the most recent forest inventory statistics as well as recovered and non-wood fibre data. In general terms, the study contributes to forest policy development by highlighting and underscoring the pressing need for reliable data, information and analysis on industrial fibre sources and their utilization, which will in turn support "efforts" to achieve sustainable forest management. The main output from this is the Global Fibre Supply Model published in 1998.

These global outlook studies have found extensive use and have been an important source of information, supporting policy discussions at various levels. As such these seem to be the only reliable source of global outlook on the forest sector available now. An important spin-off from these has been their elaboration through a series of studies in support of the World Bank's forest policy review (see Box 2).

**Box 2: Outlook inputs for the World Bank Forest Policy Review:**

As the outlook studies were being undertaken, the World Bank requested FAO's assistance for a series of outlook studies and reviews in support of the Bank's forestry policy review. Under this the following reports were prepared:

- Beyond sustainable forest management: opportunities and challenges for improving forest management in the next millennium (published in 1999)
- Towards sustainable forest management: An examination of the technical, economic and institutional feasibility of improving management of the global forest estate (published in 1999);
- Forest product market developments: the outlook for forest product markets to 2010 and the implications for improving management of the global forest estate (Published in 1999);
- Forest management in temperate and boreal forests: current practices and the scope for implementing sustainable forest management (Published in 1999);
- Tropical forest management techniques: a review of the sustainability of forest management practices in tropical countries (Published in 1999);

*The Asia Pacific Forest Sector Outlook Studies (AFSOS)*

The purpose of this study is to broadly assess the status, trends and outlook for the region's forestry sector to 2010. The study takes a holistic view of forestry covering the broad diversity of forest values. Implementation involved the preparation of national profiles for all countries and over 40 specific thematic studies which are analysed jointly and providing the necessary information base for the regional outlook study. The overall coordination and direction of the study comes from the Asia Pacific Forestry Commission, which has also taken up the responsibility for follow up of the outcome and implementation of some of the recommendations. The main outputs from AFSOS are:

- 50 Working papers covering a wide range of topics as also reviewing the forestry situation in most of the countries in the Asia Pacific Region (published during 1997- 2000);
- Main APFSOS report and Executive Summary published in 1998;

*The Forestry Outlook Study for Africa (FOSA)*

As in the case of the Asia Pacific Forestry Sector Outlook study, the Forestry Outlook study for Africa was also undertaken as a highly participatory effort involving all the countries in Africa, and under the overall guidance of the African Forestry and Wildlife Commission. The study commenced in 1999 and all reports were completed and published in 2003. The main outputs from FOSA are:

- 46 country outlook papers providing an overview of the forestry situation in the countries;
- 3 Base line studies (on demographic and economic aspects, institutional issues and demand and supply of forest products);
- 5 sub-regional reports and one regional overview report ( published in Arabic, English and French);
- A summary report (in Arabic, English and French).

*The Latin America and Caribbean Forestry Sector Outlook study (LAFSOS)*

The study was commenced in 2002 and hitherto 18 country reports, 4 sub-regional reports and a regional overview report have been produced. The draft regional report was presented to the Latin America and Caribbean Forestry Commission during its session in October 2004. The report is under finalisation and is expected to be released at the beginning of 2005.

*The European Forestry Sector Outlook Studies:*

This study, a joint initiative of UNECE and FAO commenced in 2002, has led to the preparation of a series of discussion papers involving a number of experts and institutions in Europe. The draft regional report was presented to the UNECE Timber Bureau/ European Forestry Commission meeting in October 2004. This has undergone extensive revisions and the final version of the main report was prepared in December 2004. Printed version of the report will be released in early 2005.

*The Forestry Outlook study for West and Central Asia*

Currently the Forestry Outlook Study for West and Central Asia (FOWECA), covering 23 countries in West Asia, Central Asia and the Caucasus, is in progress. Two sub-regional planning workshops have been completed and country outlook papers are under preparation. A major portion of the work of preparation of the regional outlook report is expected to be completed by end of 2005.

### **3. METHODOLOGY OF AUTO-EVALUATION**

This auto-evaluation is limited to the global and regional outlook studies carried out until now, but excludes the component, namely, State of the World's Forests Report, which was an integral part of the Programme Entity upto the biennium 2002-03. In undertaking this auto-evaluation a number of tools as outlined in the PBE Guideline were used to capture the perception of those closely involved in the implementation of the programme as also the multitude of end users of the outputs. The key tools used in undertaking the auto-evaluation are indicated below:

#### **3.1. Questionnaire survey:**

An outlook study survey questionnaire was designed by the team responsible for the auto-evaluation (the questionnaire is attached as see Annex I) and the collection and analysis was performed using an on-line tool, **SurveyMonkey. Com**. The on-line questionnaire was made available in three languages, English, French and Spanish. The auto-evaluation questionnaire was distributed to 863 persons who requested the outlook studies. In addition a slightly modified questionnaire was distributed to another 173 people who requested other publications from the FAO Forestry Department. In all 285 persons responded, but in view of the absence of information of the country from where the questionnaire was sent, only 246 were analysed. The overall response rate of about 24% is considered quite high for a survey like this. Table below provides the geographical spread of the responses. The report of the questionnaire survey is attached as **ANNEX I**. Some of the key findings of the survey are summarised in Box 2.

### **BOX 3: AN OVERVIEW OF THE FINDINGS OF THE QUESTIONNAIRE SURVEY**

- About 92% of the respondents indicated that the outlook studies are important to quite important to their work;
- 41% of the respondents were from academic institutions including students. The other important groups who responded include government and public sector companies (24%), consulting companies (14%) and non-governmental organizations (9%).
- Awareness of most the respondents was limited to the outlook studies pertaining to their region, and most were unaware that FAO is undertaking other outlook studies;
- 84% of the respondents indicated that the outlook studies have enhanced their knowledge of emerging forestry issues;
- As regards continuation of outlook studies by FAO, 86% of the respondents stated this as important to very important.
- As regards the priority topics to be dealt under the outlook studies, most respondents indicated that priority be given to (a) projections for forest resource and environment, (b) analysis of historical trends in forest resources and environmental issues (c) analysis of driving forces affecting the future outlook and (d) policy recommendations.

### **3.2. Interviews:**

About 35 persons who are opinion makers and users of/ contributors to outlook studies were interviewed by an outside consultant to assess the extent of their use of the outlook studies. Specifically they were requested to indicate the extent of use of FAO outlook studies, strengths and competitive advantages of the FAO outlook studies in comparison with other outlook studies, shortcomings and limitations, methodological issues, and future directions as regards the production and dissemination of the outlook studies. Report of the Consultant who undertook the interview is attached as ANNEX II. Some of the important conclusions emerging from the interviews as regards the future direction of work are summarised below:

- Virtually all respondents, even those who use them infrequently, stated that there is continuing need for analysis and projections for the forest sector, even though the threat of global timber and fibre shortages no longer threatens. The importance of long term sector analysis work as a tool for monitoring changes, and likely impacts of changes, in the balance of different demands being placed on the forest sector was also emphasised.
- Most also argued that FAO should continue to be taking the lead in producing such outlook studies. As was noted earlier, most users and practitioners consider that FAO has strong competitive advantages in this area, which no alternative provider is likely to be able to match.
- There was not much support for the proposition that FAO might shift some of the resources that it has available for outlook studies, from carrying out regional studies to strengthening capacity for carrying out forest sector outlook analysis at the country level.
- There was support for a greater focus on groups of similar countries – within regional frameworks. It was noted that this allowed more meaningful conclusions to be drawn than is possible for large heterogeneous regions such as Africa and Asia-Pacific as a whole.
- There was also general support for a continued broadening of the focus of the work to take account of the growing importance of demands on the forest sector for goods and services

other than timber and fibre<sup>1</sup>, and towards more analysis of the policy implications of the projections. However, it was argued that the extent and nature of the shifts that are appropriate vary considerably from region to region.

Some of the main shortcomings emphasized by the respondents relate to the ineffective dissemination of the outputs. Specifically these relate to:

- The fact that they exist is not well advertised outside the meetings at which they are launched. This seemed to be confirmed by the surprising number of persons contacted who stated that they had not known about the existence of a study, or in some cases of the FAO forest sector outlook study programme at all.
- Their findings are not widely broadcast and consequently are not available to or taken into account in other related sectors;
- It is not always clear who the intended target audience for a study is.
- They are large, dense, very technical reports not easy to read or extract information from, and are therefore likely not to be read by busy people in key policy and decision-influencing positions (several respondents stated that they have the studies but have not read them);
- FAO does not do enough to take the outputs down to the country level and help explore their implications at that level.

### **3.3. Citation survey and web statistics:**

FAO also undertook a citation analysis to assess the extent to which the outlook studies have been quoted in the various publications and reports. In all 105 citations of the outlook studies were located and the extent of use of the outlook studies was assessed. Each of the citations was analysed to find out the nature of outlook study information used and the end users of the information. The report of the citation survey and the analysis of web statistics is attached as ANNEX III.

### **3.4. Internal discussion and interviews:**

In addition a number of people in FAO, within and outside the Forestry Department, were interviewed to assess their perception about the outlook studies and the extent of their use of the information. The perception of FAO staff in Rome and the various regional offices was assessed using a questionnaire. Specifically FAO staff were requested to indicate the use of the outlook studies, the purpose of using them, quality of the outputs and their perception of the importance of outlook studies in the work of FAO. In all 37 staff were interviewed and the information gathered was synthesized and analysed (see Box 4). Report based on the feed back from within FAO is attached as ANNEX IV.

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<sup>1</sup> Though it was suggested that it was this shift that accounted for the declining interest of the forest products industries in the FAO forest sector outlook studies programme.

**Box 4 : Summary of findings from the FAO staff interviews**

A series of interview revealed that the OS has not been fully utilized as it was aimed to. Considering the users' opinions, the OS team should take the following steps to improve the OS:

- Clearly identify the target audience;
- Design the OS in accordance with their needs (e.g. contents, methodologies, analyses and study coverage);
- Create effective marketing instruments to deliver the OS to the targeted audience; and
- Establish a regular review and update mechanism.

#### **4. IMPLEMENTATION PROCESSES**

##### **4.1. Partnerships and collaborative processes**

While there is some variation in the process of undertaking the outlook studies in the different regions, in all cases FAO has made substantial efforts to promote partnership and collaboration with the key stakeholders. Specifically this included:

###### Involvement of Regional Forestry Commissions

Almost all the regional outlook studies were initiated at the request of the concerned Regional Forestry Commissions and thus had substantial endorsement and support from the countries who are members of the regional forestry commissions. The Regional Forestry Commissions also monitored the progress of the outlook studies and discussed and endorsed the final reports.

###### Participation of the countries

Active involvement of the countries has been an important thrust of all the regional outlook studies. In the case of the African and Latin American outlook studies and the ongoing outlook study in West and Central Asia, country participation is ensured through preparation of country outlook papers. In most cases the Governments were informed of the intention to undertake the outlook study and the countries were invited to participate in the process through a letter from the Director-General to the minister responsible for forestry. Regional and sub-regional planning workshops have been organized to inform the countries and to provide the national focal points an idea of what the outlook is all about as also the approach to the preparation of country outlook papers. The regional and sub-regional meetings helped the country focal points to establish contacts with their counterparts from other countries and in the process helped improved collaboration and networking.

FAO's support to countries for the preparation of the country outlook paper included the following:

- Limited financial support to cover part of the costs of preparation of the country outlook paper. This varied from US\$ 1,000 in the case of Africa to US\$ 5,000 in the case of Latin America;
- Technical guidance and support, especially through country visits and technical review of the draft paper;
- Opportunity to share ideas and exchange information through regional and sub-regional meetings.

In the process FAO also encouraged a broad-based approach involving all the key sectors that impact the forest sector. To the extent feasible, countries were encouraged to establish national working groups involving all key stakeholders so that the country outlook papers give due attention to

the impact of developments in other sectors on forests and forestry. In some cases, especially in Latin America, preparation of national outlook papers has been an elaborate process.

These efforts to involve the countries have created substantial awareness among the participants of the issues that influence the long term development of the forest sector. With the limited resources and time most countries have tried their best to actively participate in the process and to provide substantial inputs to develop a broader perception of emerging trends. No doubt, there has been significant variation in the quality of the country papers, largely depending on the technical capacity of the national focal points and the resources that were available to them.

#### Participation of international, regional and national institutions

Regional and sub-regional organizations have actively participated in the process. For example, The African Development Bank and the Economic Commission for Africa and the various sub-regional organizations in Africa (for example SADC, IGAAD, ECOWAS, CILSS) played important role in the case of the African outlook study especially in providing feed back during discussions. In several cases international regional organizations were entrusted with the task of preparation of thematic papers as also in organizing regional meetings. For example, the African Development Bank shouldered the responsibility of preparation of thematic studies (with support from the Swedish Trust Fund), while the World Bank funded studies on institutional aspects of forestry in the case of the Forestry Outlook Study for Africa. EC supported regional trust fund projects, especially on data collection and analysis in Africa and Latin America provided critical inputs for the outlook studies. Participation of academic institutions and regional organizations has been particularly strong in the case of the European Forestry Sector Outlook Studies, with several of the institutions preparing discussion papers on key topics.

#### Other institutional mechanisms to promote collaboration:

In undertaking the outlook studies significant efforts were also made to tap expertise from within and outside of FAO. An expert group comprising of forestry experts from the region reviewed and revised the draft Asia Pacific Forestry Sector Outlook Study. Similarly an External Advisory Group consisting of 7 experts from Africa provided guidance and direction as also reviewed the draft regional and sub-regional reports of the Forestry Outlook Study for Africa. In the case of the European Forestry Outlook Studies a Team of Specialists and the Working Group on Economics and Statistics provided guidance and direction.

#### Mechanisms for with-in FAO collaboration

Internal mechanisms within FAO particularly included the Internal Advisory Group, involving representatives from key divisions in the Forestry Department. However, it would appear that this was not very effective in taking advantage of the knowledge internal to the system. Interaction with other departments has been rather limited, often largely based on personal contacts. Potentials of institutional mechanisms like PAIA – GLOP were not fully utilised (partly due to the fact that GLOP-PAIA has not been very active) and much depended on individual initiatives of those who coordinated the work. Although the fact that what happens in forestry is determined largely by what happens in critical sectors like agriculture, the vast wealth of knowledge within FAO was fully taken advantage of. Also linkages with key programmes within the Forestry Department, like forest resource assessment and national forest programmes remained weak.

#### Meetings and workshops

As part of the process of undertaking the global and regional outlook studies, FAO organized a series of workshops and meetings that brought together expertise at various levels, enabling significant sharing of perception on the future of forests and forestry. This also had a significant capacity building impact that the concept of looking ahead and visualising future changes has become

more widespread. The impact of these goes far beyond the immediate outputs, especially through influencing the thinking on a long term basis.

#### Overall impact of the collaborative process

But for some problems indicated above (especially that the full information potential within the organization was not fully utilized) all the outlook studies have been undertaken as a highly collaborative process, involving all the key stakeholders. Nominees of the forestry agencies have been involved in the preparation of the country outlook paper. During the preparation of the country outlook papers, national focal points were encouraged to establish working groups involving experts from other sectors and thus ensure that inter-sectoral issues are fully taken into account. Several of the experts contributed to the process of preparing the regional and global outlook studies. This participatory approach has resulted in ownership of the outlook reports, although this in itself is not a sufficient condition to facilitate the uptake of the findings and their implementation.

#### **4.2. Methodology of implementation of outlook studies**

All the outlook studies have been implemented adopting a judicious mix of quantitative and qualitative methods, largely determined by the issues addressed and factors like availability of reliable data. Where appropriate, as in the case of some of the global outlook studies, substantial efforts have been made to use econometric models for projections drawing upon the best available expertise in the field. There are however situations where qualitative approaches are more relevant as in the case of some of the regional outlook studies. For example, in the case of the Forestry Outlook Study for Africa there has been substantial thrust on aspects like policy and institutional aspects that are less amenable for econometric modelling. Also reliance on econometric models would be misleading in the context of the poor data quality. Most readers of some of the regional outlook studies are interested in understanding the broad prospects and how various driving forces are impacting the development of the sector, rather than getting precise figures on a limited number of indicators.

### **5. ASSESSMENT OF RESULTS AND EFFECTIVENESS**

#### **5.1. Audience of the PE and documented outcomes**

The outlook study outputs are aimed at a wide range of stakeholders including policy makers, academic and research institutions, industries, and donor agencies, development organizations and large international NGOs. Partly such a broad focus has been the outcome of the collaborative process, requiring that the diverse concerns are addressed. While this has helped to provide a broad focus, to some extent this has also led to criticisms from the perspective of certain clients. For example, from the perspective of policy makers the outlook studies are seen as too bulky and detailed, discouraging them from going through the document. On the other hand many academics find the reports too broad based, failing to go into specific technical details. Striking the right balance that satisfies diverse interests is hence a difficult task. While an all encompassing report is appropriate for catering to the needs of wider readership, there is a case for production of very short policy briefs that are particularly focused on policy makers who are unlikely to have the time to read long reports.

Interview of users (see ANNEX II) indicated a marked degree of variation in the use of outlook studies from one organization to another and among individuals within a particular organization. Among the donor agencies and development organizations outlook studies were being used as an input into the processes to formulate regional and sub-regional forest sector policies and strategies or to set targets for particular multi-country programmes and projects. They were also being used to provide briefing on the situation in individual countries. In a few organizations their use was routine in forest sector operations, more frequently use was confined to particular managers or analysts and particular programmes (see Box 5 and 6 for examples).

#### **BOX 5: EXAMPLES OF USE OF OUTLOOK STUDIES**

- Use of FOSA in the African Development Bank in providing assistance to sub-regional bodies such as SADCC and ECOWAS in developing their strategies for the forest sector;
- Use of FAO forest resource, production, trade, and outlook data in the preparation of a goal statement and new targets for forest protected areas and sustainable forest management in World Bank client countries, for negotiations to renew the World Bank - WWF Alliance for Forest Conservation & Sustainable Use;
- APFSOS documents used as strategic inputs in identifying CIFOR research priorities in the region;
- The GFPOS plantations study used as a source document in a Conservation International assessment of the impact of plantations on the environment.

Interviews also revealed that respondents from consulting groups working mainly for the private sector proved to be important users of the studies, in particular for assignments requiring multi-country coverage, or/and analysis over relatively long time horizons. Among the uses described was that of helping potential new suppliers understand the functioning of the forest and forest products sector in the major consuming regions, and the requisites for successfully engaging in such markets.

#### **BOX 6: USE OF OUTLOOK STUDIES**

Academic respondents emphasised that the outlook studies provide an important reference and teaching source for courses and texts on world forestry, and feature prominently in university forestry libraries. It was argued that this can impact on a large number of foresters and others concerned with the forest sector. One European academic who has been a principal adviser to his country's forestry aid programme for many years, commented that much of the knowledge about developments in the forest sector that he had been able to bring to the latter resulted from his use of the outlook studies in developing his teaching courses and materials. Several of the respondents were individuals who feature prominently as speakers and paper authors at international forestry and forest-related congresses and conferences. All identified the outlook studies as being among the main sources that they draw upon.

A number of respondents made the point that, though they made little direct use of the study, they had benefited from being involved in the process of developing the study for their region. It was also argued that the wide spread of such involvement in the preparation of recent studies had been useful in getting people to think about the issues confronting the forest sector.

Impacts of outlook studies therefore appear to be largely indirect; through the policy documents, consultant and research reports, conference outputs, etc., that are shaped in part by using inputs from outlook studies. As such the impacts are difficult to identify, and even more difficult to measure. Very few respondents managed to identify specific impacts resulting from use of an outlook study.

## **5.2. Progress towards the realization of the objective**

While the ultimate expected outcome of the PE is to improve policy processes through strengthening the knowledge base, establishing an immediate and direct impact of the outputs as regards policy changes is extremely difficult. There are clear indications that the PE significantly contributed to enhancing the knowledge base, especially since no other organization is involved in undertaking such broad based global and regional sector outlook studies. One of the reasons for adopting a protracted process of stakeholder involvement in the outlook studies is create ownership of the process so that results are easily mainstreamed into decision-making. However, this did not happen and more often the impact has been more indirect. It is also unrealistic to expect immediate and direct policy actions based on the outlook studies, as notwithstanding the involvement of the countries and other stakeholders, policy making takes substantial time and resources. In such a situation, outlook studies need to be seen as one of the sources of information, and changes in policies and plans stem largely from a number of other factors.

An issue that links the outputs to concrete outcomes in the field of forest policy changes is the extent to which the products are designed to meet the needs of key policy decision makers. While the outlook studies have reached policy makers in the forest sector (especially in the forest departments and ministries dealing with forests), this in itself is not a sufficient condition to facilitate desired action. In many countries those in the ministries and departments of forests are not influential enough to bring about policy changes that will have a perceptible impact on forests. In most cases the ministries responsible for economic development, finance and agriculture are more influential in affecting the fate of forests directly and indirectly. Unfortunately, these critical decision makers have largely remained outside the reach of the outlook studies.

It would appear that involvement of a national focal point nominated by governments, although it lends some credibility to the process, need not necessarily result in better ownership of the process. In most situations, the task of preparing country outlook papers and participating in the process was assigned to someone in the forestry department. In most cases the involvement of other departments/ ministries is rather limited and this is an important factor that influences the uptake of the conclusions and recommendations. However, given the institutional arrangements that are sector focused, it is unrealistic to expect significant involvement of other sectors in the outlook study process.

## **5.3. Achievements in terms of equity and gender issues:**

In addressing gender and equity issues, the outlook studies rather focused on two aspects namely:

- What is likely to happen to the forest sector in the foreseeable future in the context of the collective impact of the driving forces?
- What are the options available to address some of the anticipated negative impacts and shift to a better scenario so that forests and forestry could enhance the contribution to sustainable development.

Consideration of equity issues was more direct, especially in those relating to the regional studies, although it varied depending on the specific situation in the different regions. Specific attention was given to changes in income and its distribution and their possible impact on the demand for forest products. Based on these findings, some of the regional studies (for example the Forestry Outlook Study for Africa) emphasized the need for focusing on the poverty alleviation role of forests. In fact the Forestry Outlook Study for Africa specifically identifies poverty alleviation as one of the

two pillars of forestry development in Africa and makes a number of recommendations on how this may be pursued in the five different sub-regions.

#### **5.4. Cost-effectiveness**

Total investment on the outlook studies over the last three biennium ( 2000-2005) is estimated as US\$ 2.59 million and this has resulted in a substantial body of knowledge on the long term outlook of the sector, globally and regionally. Probably some savings could have been effected if some of the processes were cut short. However, the fact that this is the first time that FAO is making an effort to undertake systematic outlook studies, and in fact the prior knowledge on the method and processes of outlook studies were limited, it was necessary to go through a protracted process. This need to be considered as an investment that could benefit future studies, especially if the lessons are taken on board and methodologies improved and refined.

#### **5.5. Major factors affecting project results**

The following are some of the deficiencies that need to be addressed in making the outlook studies more effective:

##### Improving internal coordination and taking full benefit from the in-house information:

Although those responsible for implementing the outlook studies did consult with those in other disciplines and mechanisms like internal advisory group presented opportunities to seek in-house guidance and support, this is still an area that requires considerable improvement. Although the outlook studies were visualised as a department-wide effort, synthesizing knowledge from within and outside the Forestry Department and providing a basis for global and regional discussion on the changing forest-society relationship, it is yet to evolve in that direction. There is considerable potential to have close collaboration with key initiatives like the national forest programme and the forest resource assessment. While the outlook studies could gain a lot from these two programmes, they in turn could also gain considerable insights from the outlook studies, providing an indication of long term issues that may help to improve the implementation of these programmes. However, this synergy has not been fully taken advantage of.

##### Marketing the products and advocacy:

While the participatory approach adopted in implementing the outlook studies has led to ownership of the studies, this in itself is not a sufficient condition for adoption of the findings for sector planning at various levels. While the outlook studies have found acceptance in the different statutory bodies like COFO and the regional forestry commissions, this is almost like preaching to the converted. Although all the outlook studies have clearly taken cognizance of the fact that it is the developments in other sectors that crucially impact the developments in the forest sector, the post-studies phase has not adequate attention to take the message to decision-makers, especially outside the forest sector. Once the studies have been published, for all practical purpose it is seen as an end in itself.

In informing the outcome of the outlook studies, it is important to adopt a different approach and probably adopt an advocacy approach. While the bulky outlook studies provide a strong technical base, it is important to appropriately redesign advocacy outputs in easily understandable policy briefs, indicating what are likely to happen, if the current trend continues and what needs to be done to shift towards more positive scenarios. It is also important to look for opportunities other than the regional forestry commissions (where essentially it is focused on those who are already aware of the issues and where discussions tend to be more technical). It is important that outlook studies are disseminated

more effectively in other fora, including the FAO regional commissions and regional and sub-regional economic development agencies. Unfortunately, this has not been the case hitherto and has to some extent affected the realisation of the full potential of such outlook studies.

#### Follow up at the country level

Once the regional outlook studies are completed, practically no effort is made to follow up the findings at the country level and to help countries to adapt the findings to develop national strategies. This has to some extent affected the actual use of the outlook studies, especially in situations where country capacity in strategic planning is very limited.

### **5.6. Strengths, weaknesses, opportunities and threats:**

Based on the discussion and analysis some of the strengths, weaknesses, opportunities and threats that the current programme of outlook studies confront are indicated below:

#### **Strengths:**

- FAO has a global perspective and is able to provide a wider perspective that most organizations are unable to provide.
- As a non-political and neutral body, FAO's work is widely accepted and considered unbiased.
- FAO is probably the only organization that has global information on forest resources and forest products. This provides unique strengths in undertaking outlook studies that are not available to other organizations;
- FAO has also the most extensive information relating to agriculture and other allied sectors that are critical to support the outlook studies in the forest sector. No other organization has such extensive wealth of information.
- FAO's approach of involving all the stakeholders, especially the countries are a distinct advantage in ensuring ownership of the outputs. This is particularly important in ensuring better follow up of the findings and recommendations;
- The regional approach adopted in implementing the outlook studies is well appreciated and in most cases is owned and pursued by the Regional Forestry Commissions. This is an important strength of FAO's work on outlook studies.

#### **Weaknesses:**

- The need to carry all the constituents together often dilutes FAO's ability to provide objective and politically sensitive conclusions.
- Such broad-based involvement also has a disadvantage in increasing the transaction costs. Ensuring the participation of the countries requires a protracted process of convincing all the countries of the importance of the outlook studies and mobilising political and institutional support which is extremely time-consuming.
- In view of the inherent weaknesses in information, especially at the country levels, dependence on such information often affects the reliability and accuracy of forecasts on demand and supply of forest products;
- Although FAO has a wealth of information, especially relating to sectors that critically impact the developments in the forest sector, these are not fully taken advantage of. The extent of effort to collect, synthesize and analyse in-house information needs significant improvement.
- Notwithstanding the efforts to involve all key stakeholders in the outlook studies, they are still not widely known, especially among key decision makers. Marketing and advocacy of outlook study findings seem to be far from satisfactory.
- Efforts to follow up the findings of the outlook studies at the country level and to translate them into country level initiatives are very limited.

## **Opportunities**

- Increasing pace of globalisation would necessitate that countries take into account the long term perspectives in strategic planning and there will be an increased interest in long term outlook studies. Particularly so in the context of expanding global and regional trade of forest products and the changing loci of demand and supply.
- As new mechanisms for global, regional and sub-regional economic cooperation emerges, there will be increasing demand for studies that provide broader perspectives. This is particularly so in the context of the various international forestry processes.

## **Threats**

- The rapid pace of changes in the context of globalisation also enhances uncertainties, requiring FAO to continuously monitor changes, in the absence of which the outlooks may become outdated soon, undermining their credibility.
- With increasing access to information and the potential for networking among smaller organizations, many of them may be in a position to develop comparable outlook studies, although for sometime to come they may continue to depend on information provided by FAO;
- Industry organizations are undertaking their own outlook studies focusing on particular products and markets. As they are more focused and are able to mobilise substantial resources, it may undermine the need for FAO to undertake outlook studies, especially on products and markets that are covered by such organizations.

## **6. FINDINGS AND RECOMMENDATIONS**

### **6.1. Important findings**

#### Lack of reliable information

Lack of reliable information is identified as a major methodological problem in undertaking the outlook studies. Many respondents expressed the view that not only is this not getting appreciably better, in some situations it is getting worse. Largely this stems from the weaknesses in national information systems. While the demand for wood and wood products could be estimated within a broad range, wood supplies are difficult to predict, especially as this is dependent on several factors. Among the wood and wood products, one category that has been particularly affected is that of woodfuel, which accounts for almost 50% of the roundwood production. In most developing countries, production and consumption of woodfuel takes place in the informal sector and consequently no reliable information is available. The lack of information is particularly serious in the case of non-wood forest products. Only in the case of commonly traded products some data are available and in the case of most of the products no reliable estimates are available.

#### Need for consistency in the approaches to outlook studies:

While FAO Forestry Department has been undertaking sector outlook studies for the last many years, the approaches and methodologies have not been streamlined and often there is some inconsistency in the approaches adopted in undertaking the outlook studies, largely reflecting the perceptions of individuals shouldering the responsibility for implementing the outlook studies. While this is inevitable and to some extent required, the expertise and experience acquired over time in the implementation of the outlook studies need to be better institutionalised so that the process of implementing future outlook studies is streamlined and the learning process improved. This is particularly important to improve consistency and comparability, especially when the regional outlook studies form an important source of information for global outlook studies. There is thus a need to

develop guidelines and methodologies that are regularly updated based on the various experience from the outlook studies.

Lack of follow up on the outcomes:

There is some concern that the potential of the outlook studies are not fully recognised and insufficient efforts are made to follow up the findings and recommendations. Systematic efforts to follow up and implement recommendations are however wanting. In some of the regions like Africa, there is a need to incorporate the findings in the national forestry programmes and to improve strategic planning capacity. However, on account of the limited resources follow up activities could not be pursued systematically. Much of the follow up action rests with the various stakeholders, but:

- Due to inadequate efforts to publicise the outcome and recommendations the awareness of the existence of outlook studies remains rather poor.
- Even if there are useful recommendations, translating these into follow up action, especially at the country level faces a number of problems.

Some of the global outlook studies have formed the basis for global discussion, especially in international fora. Another major problem is that once an outlook study is completed and the reports published, there is very little follow up, firstly to publicise and market the product and to encourage the various stakeholders to take advantage of the findings. Ideally the global and regional outlook studies are intended to support the development and implementation of the national forest programmes. Available evidence suggests the need for substantial post-study follow up to enhance the uptake of the findings. Partly this stems from the limited resources available to invest in follow up activities.

In-house use of the outlook studies:

A similar problem exists as regards the use of outlook studies in improving the focus of other programme entities within FAO and in particular the Forestry Department. Although there is awareness of the existence of the various outlook studies and the broad approach that could provide a basis for improving the implementation of other programme entities, this potential remain far less taken advantage of. It is incorrect to say that the outlook studies are not effectively used in-house. These outlook studies have formed the basis of other important initiatives like Agriculture 2015/2030 and the companion volume to the Comprehensive Africa Agriculture Development Programme of the New Partnership for Africa's Development (NEPAD). However, it would appear that the full potential of outlook studies in improving the activities in other areas of activities of the Forestry Department has not been realised.

Developing a common framework

Although FAO has been undertaking outlook studies in forestry and allied areas, the absence of a common framework is evident. There is particularly scope for using a common database and information for many of the driving forces – especially demographic changes, economic changes, developments in the field of policies and institutions, etc. – that could be used in most of the outlook studies, including in other sectors. Instead every time an outlook study is initiated substantial time is devoted in collecting and compiling this information from various sources. This is an area where time and resources could be saved through organization-wide initiatives, especially through improved access to critical information. PAIA-GLOP could be an important mechanism to facilitate the sharing of information among those undertaking outlook studies in the different sectors.

### Impacts of the outlook studies

The telephonic survey of opinion formers and other users of the outlook studies provided interesting results. It showed a marked degree of variation in use of the outlook studies from one organisation to another, and even among individuals within a particular organisation. The main uses of the outlook studies and their impact are summarised below:

- *Donor agencies, development banks and large international NGOs* – Global, regional and sub-regional policy and strategy formulation, and target setting; more limited use in briefing on situation in individual countries
- *National forestry administrations* - Monitoring broader contexts such as regional markets and forest product supply availability; source of information on practices in other countries relevant to what might be appropriate in the home country; background information for use in formulating national positions in meetings of international forestry bodies such as UNFF and ITTO
- *Research and consultancy organisations* - Source of data and analytical information, in particular for work commissioned by the donor community and industry
- *Education and advocacy* - Reference and teaching source for courses and texts on world forestry; reference source for keynote papers and presentations at international congresses and conferences

Impacts of outlook studies therefore appear to be largely indirect: through the policy documents, consultant and research reports, conference outputs, etc. that are shaped in part by using inputs from outlook studies. As such they are difficult to identify, and even more difficult to measure. Very few respondents managed to identify specific impacts resulting from use of an outlook study.

## **6.2. Recommendations**

### Continuation of outlook studies

1. Almost all those interviewed and most of those responded to the internet survey questionnaire clearly expressed that FAO continue with the programme on outlook studies at the global and regional level. It was pointed that FAO has a unique advantage, not available to other organizations and the objectivity and neutrality of FAO are very much appreciated. FAO is also in a much better position to provide a cross-sectoral perspective, in view of its wealth of information on the developments in other sectors like agriculture, animal husbandry, etc.
2. In view of the fact that forestry outlook studies directly contribute to the strategic objective of regularly providing information on future trends, it is recommended that this may be established as a continuing programme as is the case with similar programmes in other departments.

### Improved marketing of the outlook studies

3. One of the major weaknesses of the outlook studies is that they are not effectively marketed and the existence of the outlook studies are not widely known. There are clear indications that inadequate resources are expended in promoting and marketing the outlook studies. Although outlook studies outputs are communicated through printed reports, internet and some promotion during events like COFO, this is far from adequate to capture the attention of potential users at the decision-making level, especially in the key ministries like planning and finance. FAO should have a clear marketing strategy, which should become an integral part of the production of outlook studies and in some cases it is advantageous to work backwards on the production process.
4. Most products of the outlook studies are not designed to reach key policy decision makers and end use studies indicate that academic institutions are the primary users of the FAO outlook studies. While this may have indirect impacts, FAO need to address directly policy makers if the outlook

studies are to have an impact in shaping the future of the forest sector. It is recommended that FAO produces short and succinct policy briefs (1-2 pages) outlining key findings from the outlook studies and their implications on each country.

5. In addition to COFO and the sessions of the Regional Forestry Commissions, efforts should be made to inform broader audience, especially in other sectors. Opportunities provided by the Regional Commissions, meetings of regional and sub-regional economic organizations, etc. should be taken advantage of to inform the findings of the outlook studies. FAO need to adopt a proactive approach in this regard.

#### Enhanced coherence in the outlook methodologies

6. Although FAO has undertaken a number of outlook studies, there are inconsistencies in the approaches between different outlook studies. This largely stems from the inadequate effort to learn from the experience and adapt approaches and methodologies in the subsequent outlook studies. Often the outlook studies are implemented by different people, with widely differing skills and understanding of outlook studies and the exchange of information and experience is often limited. Continuity and consistency between different outlook studies need to be ensured to refine and improve methodologies so that the quality and implementation efficiency are improved continuously. To facilitate this it is recommended that a **core group takes the full responsibility for the design and implementation of all the outlook studies.**
7. There is an urgent need to develop guidelines and manuals on undertaking outlook studies, drawing upon the extensive experience that the Forestry Department now possesses in implementing outlook studies. As such there is a danger that the valuable experience that individuals gain in the process of undertaking outlook studies are not documented and institutionalised. It is therefore recommended that FAO invests sufficient time and resources to develop appropriate guidelines and methodologies in for undertaking outlook studies at the global, regional and national levels.
8. **Establishment of a core group of staff who will be able to undertake all outlook studies would help to substantially reduce the start up time of outlook studies.** In fact there should be a seamless shift from one outlook study to the next, drawing upon the lessons and findings from the previous one. As such there is significant discontinuities in terms of approaches, personnel and time

#### Redesigning the methodology of implementation

9. As such considerable time and resources are expended in the preparatory phase of the outlook studies, especially to obtain concurrence and participation from the countries. Informing the countries, getting nominations of focal points from the countries, getting arrangements in place to prepare the country outlook papers, organizing planning workshops to brief the national focal points, etc. consume a substantial time of the participants. However the quality of the country outlook papers, in spite of considerable efforts, is extremely varied and often not commensurate with the efforts expended. The Forestry Department should carefully consider various options to achieve a balanced distribution of time and resources between (a) the preparatory phase, (b) the production phase and (c) the dissemination phase. In many cases the production of the final report and its dissemination receives less attention that they deserve, especially all the previous steps creates a fatigue and much of the effort is directed to complete and close the process.
10. While participatory approaches and processes are important, to ensure ownership of the studies by the stakeholders, here again efforts should be made to strike a balance between the process and the timely production of quality product. FAO outlook studies need to strike an acceptable balance and ensure that under no circumstance quality is sacrificed.

11. One of the problem about the outlook studies is that they become fast outdated, especially in the case of the long term outlook studies with a time horizon of over 10 years. While it is important to provide an indication of the long term scenarios and how society-forest relationship is likely to change over time, it is also important to provide regular updates, and to take cognizance of key shifts from the paths anticipated earlier. These shifts are particularly significant in some of the developing regions/ countries and require regular monitoring and updating. FAO should consider (a) establishing a system of regularly monitoring critical changes in the regions and countries that are particularly likely to have significant global/regional impact and (b) incorporate the changes to refine the outlook at shorter intervals.
12. During the interval between two successive regional studies, FAO should identify key thematic issues that need to be analysed in depth. To some extent this is being done as is the case of the Asia Pacific region. These thematic studies should focus on key areas that have been identified as important in the regional outlook study and in a way form an important input for initiating the next round of outlook studies.
13. This would require some **changes in the way the outlook studies are managed within the Forestry Department**. Currently outlook studies are undertaken by ad hoc teams constituted for each region as and when the studies are undertaken. This doesn't help to build up core capacity in outlook studies on a long term basis. Now that a complete set of regional outlook studies have been undertaken and much of the work will involve regular updating, the Forestry Department should consider having a different system in place for this task. While a senior officer should be responsible for the overall programme, one officer should be assigned to monitor the developments in each region, in collaboration with the concerned regional forestry officer.

#### Internal coherence and linkage with other programmes within FO and FAO

14. Current level of efforts to develop linkages with other programmes in the Forestry Department, especially national forest programmes and forest resource assessment need substantial improvement. Appropriate mechanisms need to be established within FO to strengthen the coordination between the three key programmes namely resource assessment, national forest programmes and sector outlook studies.
15. Within FAO there is considerable potential for synergy with other Departments. In fact the major strength of FAO in undertaking outlook studies in the forest sector stems from the opportunity to take advantage of the enormous wealth of information in key sectors like agriculture. Unfortunately the linkage now remains very weak. Contrary to the intentions, current institutional mechanisms like PAIA-GLOP are not effective in providing a broader focus to the outlook studies. While there is an urgent need to strengthen PAIA-GLOP, other measures, both formal and informal, need to be pursued to enhance collaboration with other departments, specifically to improve the understanding of cross-sectoral impacts.

#### Updating global demand and supply projections

16. Notwithstanding the limitations of data, there is a continued demand for information on future demand for wood and wood products and the outlook for global and regional supply changes. This is critical for a wide group of clients including industries, international organizations, governments, etc. Although there are outlook studies by various interest groups (especially by industries) these are partial and seldom address the broader issues. FAO therefore need to invest adequate resources to periodically update the forecast for global and regional demand and supply for forest products and build up necessary in-house capacity to lead the production of such forecasts.

#### Follow up of outlook studies at the country level

17. Most often once the regional outlook studies are completed, there are inadequate efforts to take the findings to the country level and to outline how regional and global developments as also developments in other sectors are likely to impact the forest sector in the long term. FAO should make concerted efforts to incorporate the findings from the outlook studies while providing support to countries in implementing national forest programmes as also in developing proposals for support under the TCP.

Improving forest products information

18. The strength of the FAO outlook studies largely stems from its information system particularly relating to forest products that covers almost all countries and a number of decades. However, the quality and reliability of information is extremely varied, largely depending on the capacity of the countries to establish and maintain an effective system for collection, processing and analysing information. In many countries formal system in the forest sector is at best under-developed and to that extent affects the reliability of projections in the outlook studies. The need to invest in improving the information system in most countries, especially the developing countries, still remains important.

**ANNEX I PRELIMINARY FINDINGS FROM FORESTRY OUTLOOK  
STUDIES USER SURVEY**

**Preliminary findings from Forestry Outlook Studies  
User Survey  
(first draft)**

*by*  
*consultant Arvydas Lebedys*  
*Forest Economics Service, Forestry Department*

November 2004

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## **INTRODUCTION**

Over the past years FAO has carried out a number of forestry outlook studies (OS). Study reports were requested and used by many different stakeholders. Opinion and feedback from OS users is important for focusing on relevant issues, topics in ongoing and future FAO forestry outlook studies.

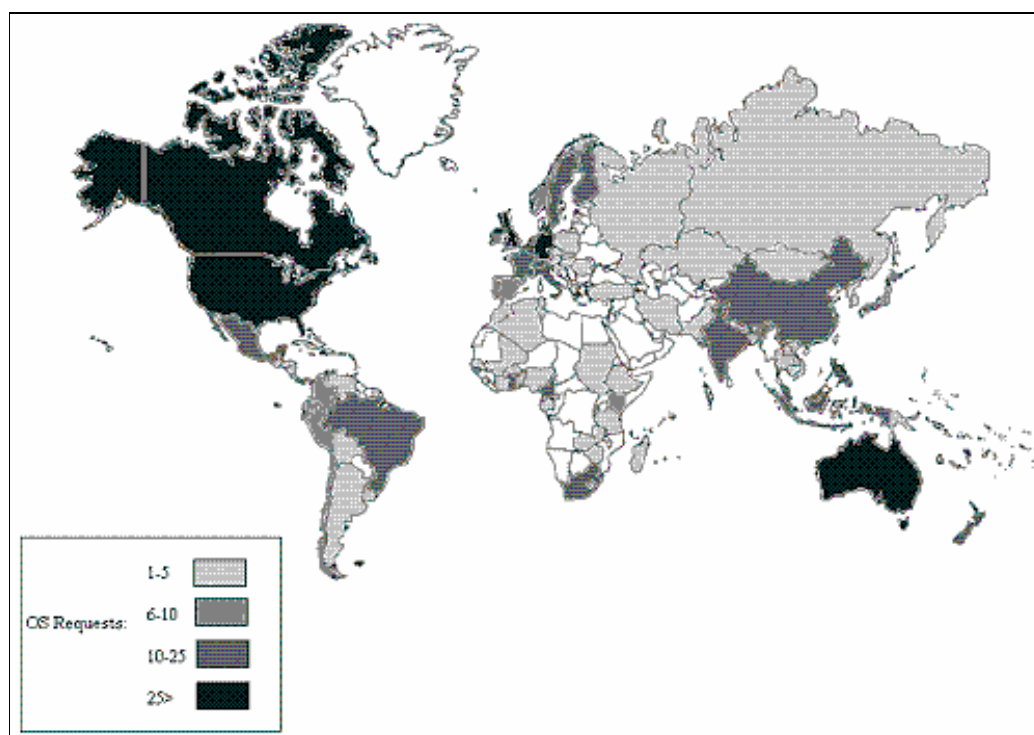
Purpose of the report is to present the preliminary findings<sup>2</sup> from the quantitative and qualitative responses to the electronic survey carried out in autumn 2004.

Report covers the users' opinion on the following outlook studies:

- Fifth European Timber Trends Study (1996)
- North American Timber Trends Study (1996)
- Global Fibre Supply Model (1998)
- Global Forest Products Outlook Study (1998-2002)
- Asia-Pacific Forestry Sector Outlook Study (1998)
- Papers for the World Bank Forest Policy Review (1999)
- Forestry Outlook Study for Africa (2003)

Auto evaluation questionnaire was distributed worldwide (over 70 countries) to 863 people, who requested OS reports (*see Figure 1*). The list of people was provided by FAO.

**Figure 1** Outlook study requests by countries



<sup>2</sup> FAO forest outlook studies autoevaluation survey was started in October and will be open until 15 December 2004. Preliminary findings in the report are based on the responses received by 30 November.

In addition, slightly differently designed, more general questionnaire was distributed:

- to other 137 people who requested from FAO any other data (statistics, etc.)
- posted as a link on FAO Forestry Outlook Studies website
- posted as a link on forestry on-line forum websites mailing lists

The rest of this report is in three main sections. The first section briefly describes the methodology (questionnaire). The second section presents preliminary results of the survey. Annex data tables give the detailed information about the responses.

### **METHODOLOGY**

OS user survey questionnaire was designed by FAO. Collection and analysis of the responses was performed using an on-line tool SurveyMonkey.com ([www.surveymonkey.com](http://www.surveymonkey.com)). Surveymonkey allows easily distribute (email lists, link to email message or link to website) and analyse the responses (export to summary and detailed responses to spreadsheet format).

The on-line survey was distributed in 3 languages, English, French and Spanish. Questionnaire was designed in the way that same person's response is recorded into the system only once, i.e. the respondent's computer is recognised according to IP address. This option allows avoiding multiple responses by the same person, i.e. gives reliable results of the survey.

*NOTE: Currently the survey is open until 15 December 2004, and the final results will be consolidated into simple database and transferred to FAO after the survey is closed.*

### **PRELIMINARY RESULTS OF THE SURVEY**

#### *Respondents' characteristics*

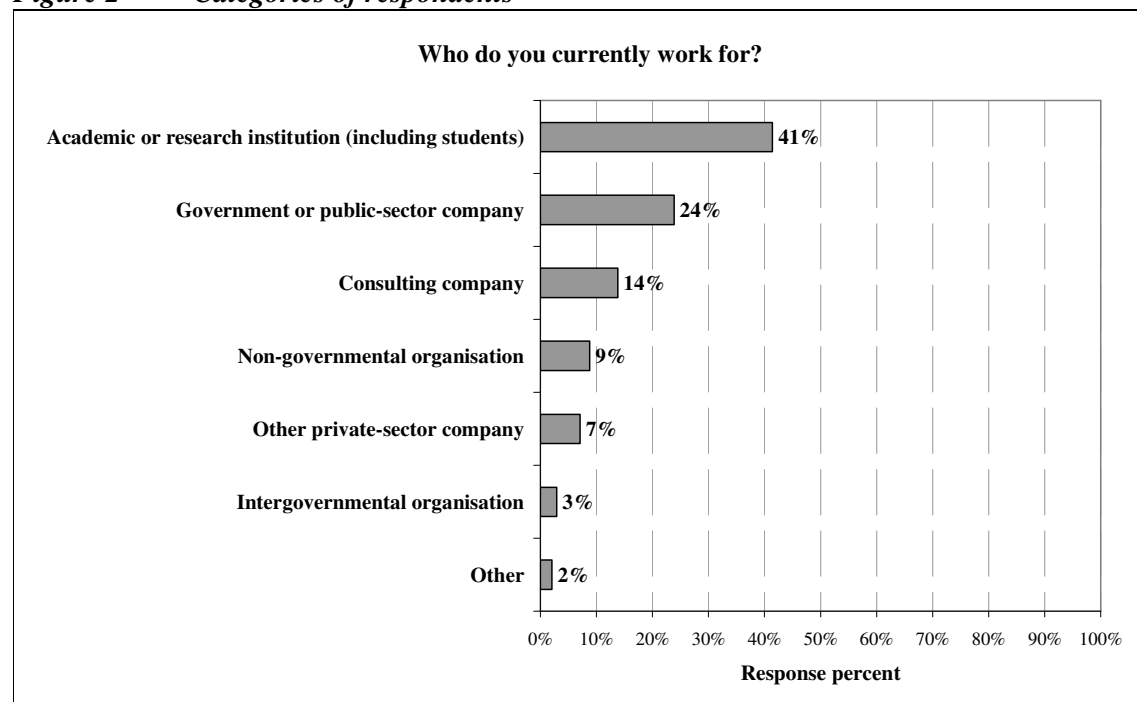
**Table 1**      ***Questionnaire distribution and responses statistics (30-11-2004)***

	<b>Type of questionnaire</b>		
	<b>People who requested OS</b>	<b>Other people</b>	<b>Total</b>
1. Distributed to mailing lists provided by FAO	863	173	1036
2. Number of invalid emails	325	46	371
3. Number of valid emails (1-2)	538	127	665
4. Number of tracked responses from email lists	176	54	230
5. <i>Percentage of tracked responses (4 / 3)</i>	<i>33%</i>	<i>43%</i>	<i>35%</i>
6. Anonymous responses	X	55	55
<b>Total responses</b>	<b>176</b>	<b>109</b>	<b>285</b>

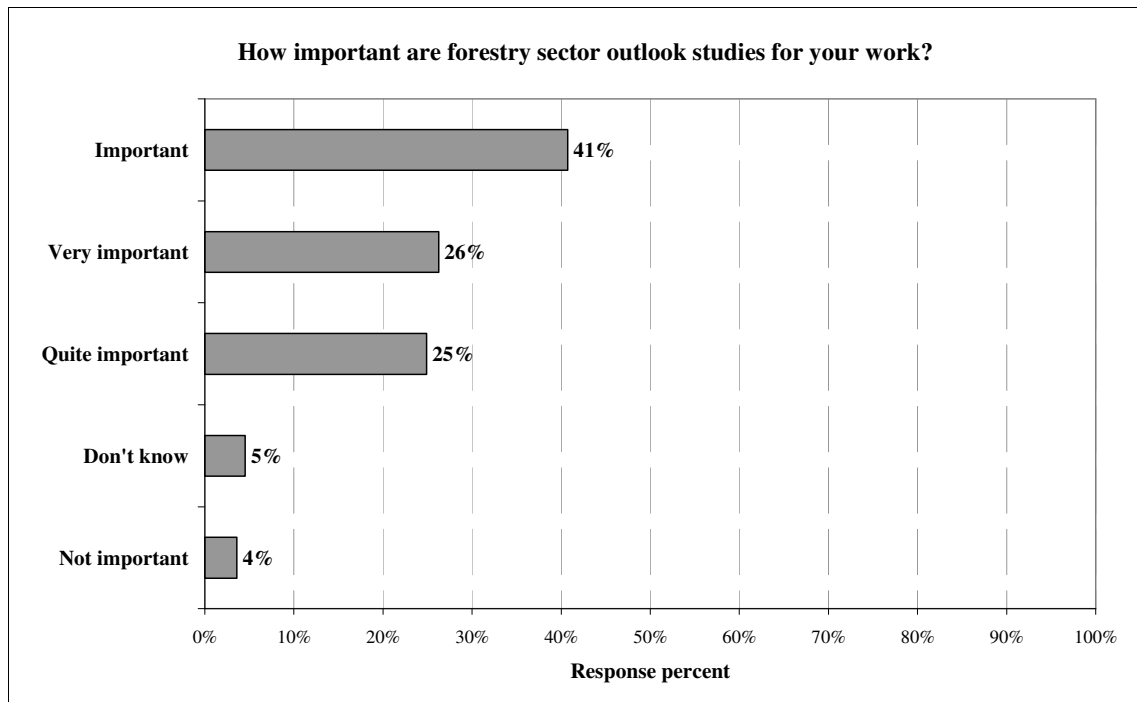
**Table 2 Responses regional statistics (30-11-2004)**

	Number of countries	Number of responses
Africa	12	28
- tropical Africa	10	23
- temperate Africa	2	5
Asia	20	43
- tropical Asia	11	29
- temperate Asia	9	14
Oceania	4	18
- tropical Oceania	2	2
- temperate Oceania	2	16
Europe	18	74
North and Central America	8	58
- tropical NC America	6	11
- temperate NC America	2	47
South America	7	23
- tropical S. America	5	21
- temperate S. America	2	2
<b>World total</b>	<b>&gt; 69</b>	<b>285</b>
- tropical countries	> 34	86
- temperate countries	> 35	160
- unspecified	...	39

**Figure 2 Categories of respondents**

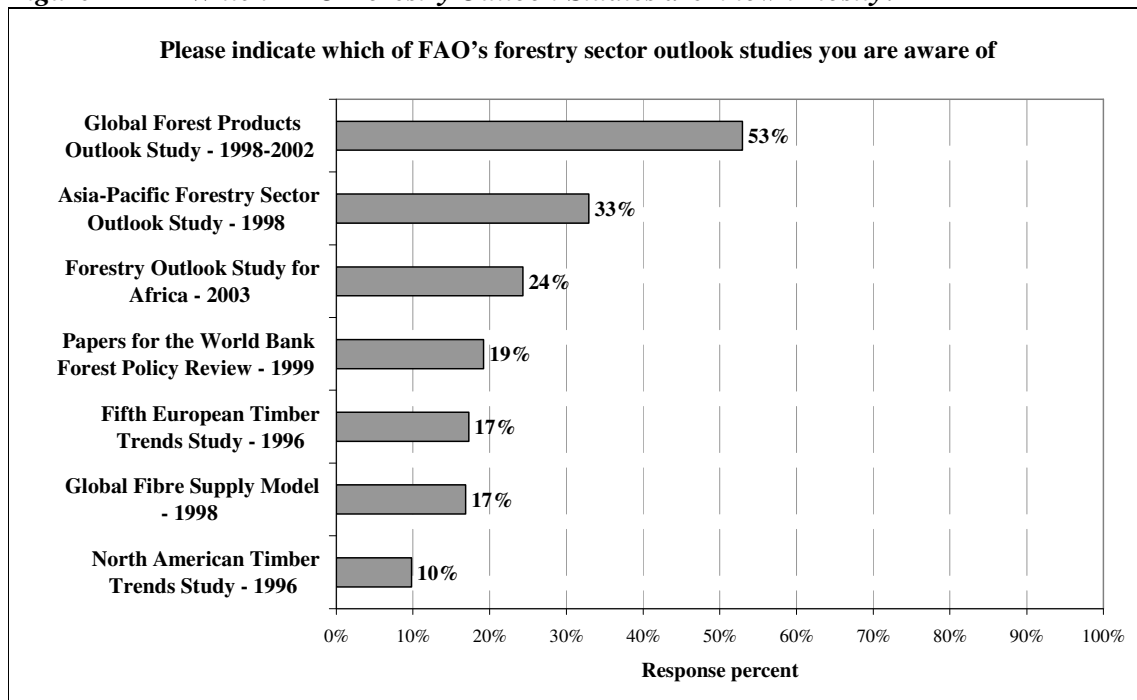


**Figure 3** *How important for respondents are forestry outlook studies*

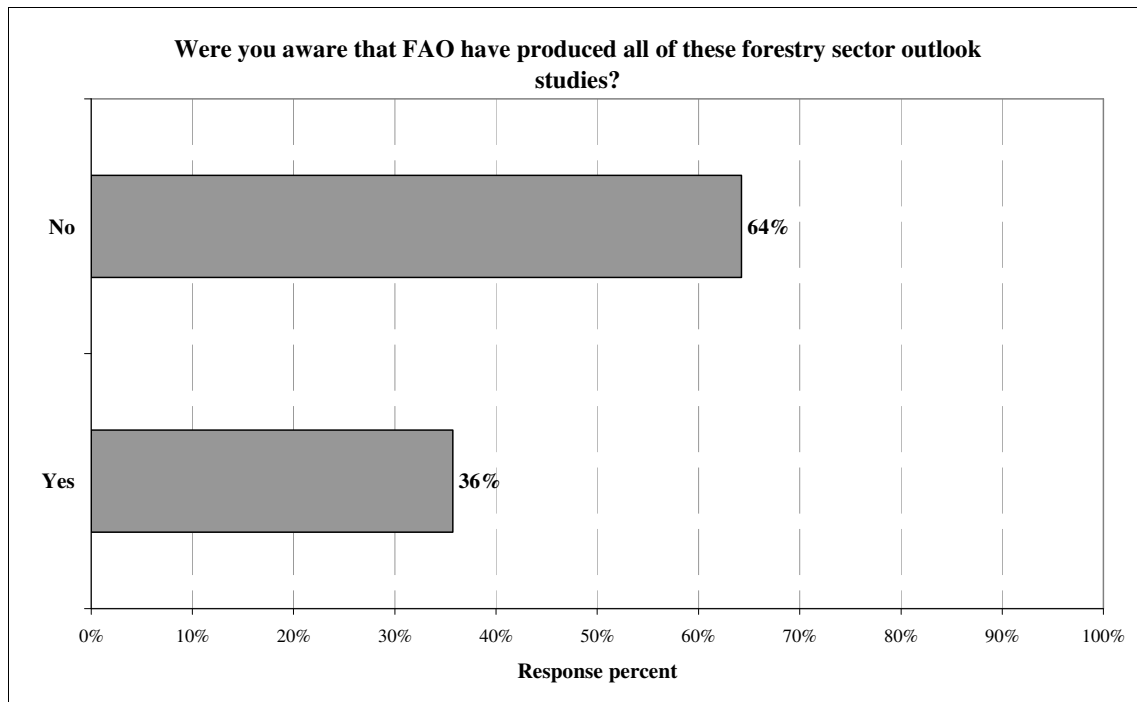


*Awareness about FAO Forestry Outlook Studies*

**Figure 4** *Which FAO Forestry Outlook Studies are known mostly?*

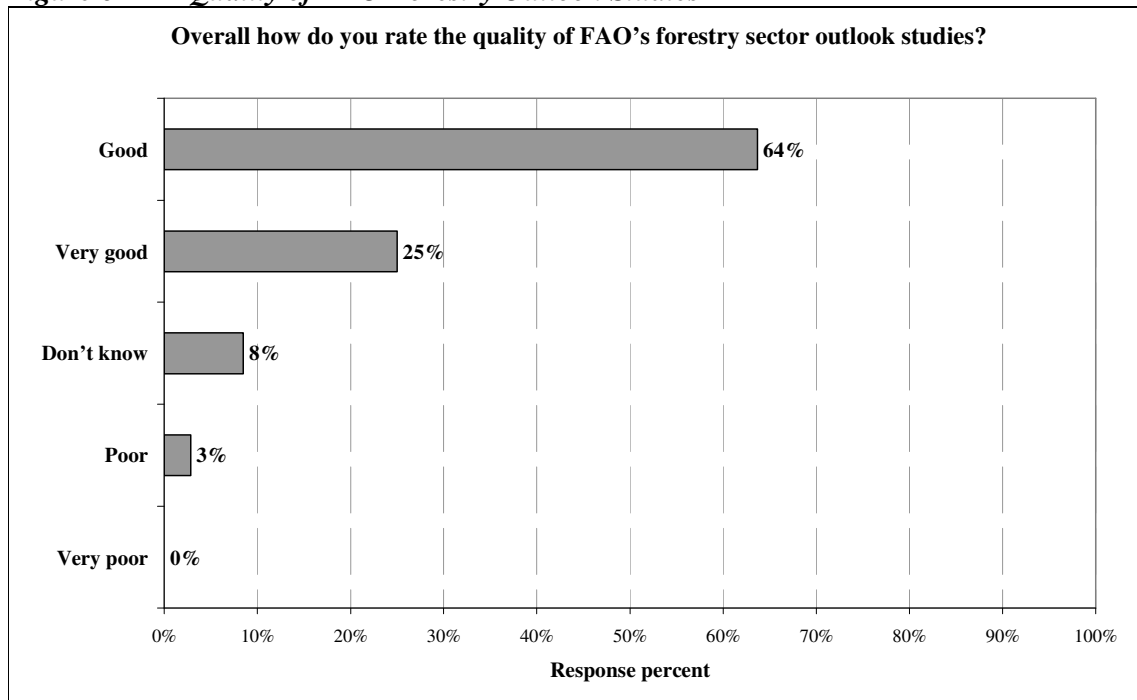


**Figure 5** *Is FAO recognised as producer of Forestry Outlook Studies*



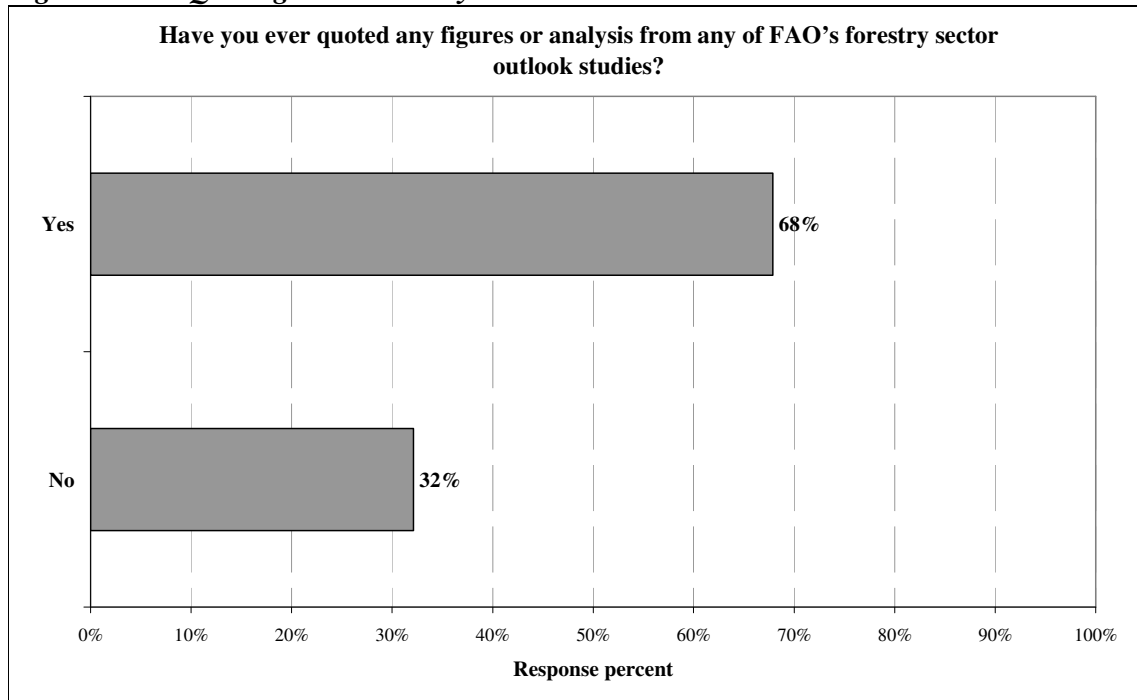
*Quality of FAO Forestry Outlook Studies*

**Figure 6** *Quality of FAO Forestry Outlook Studies*

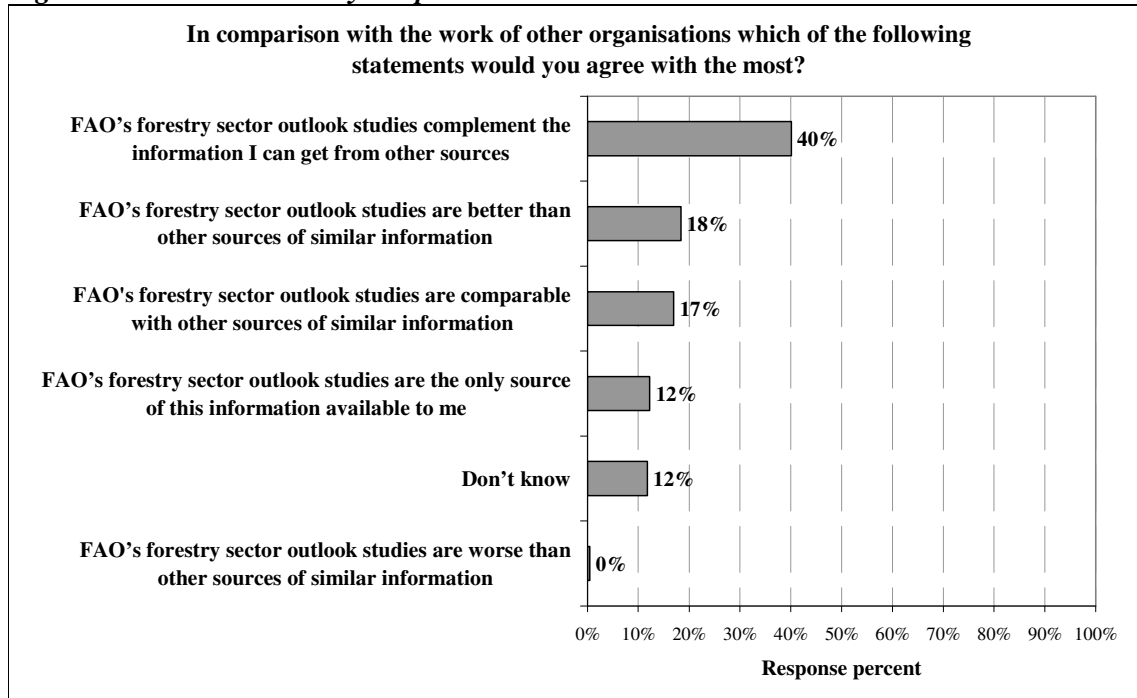


Use of Forestry Outlook Studies

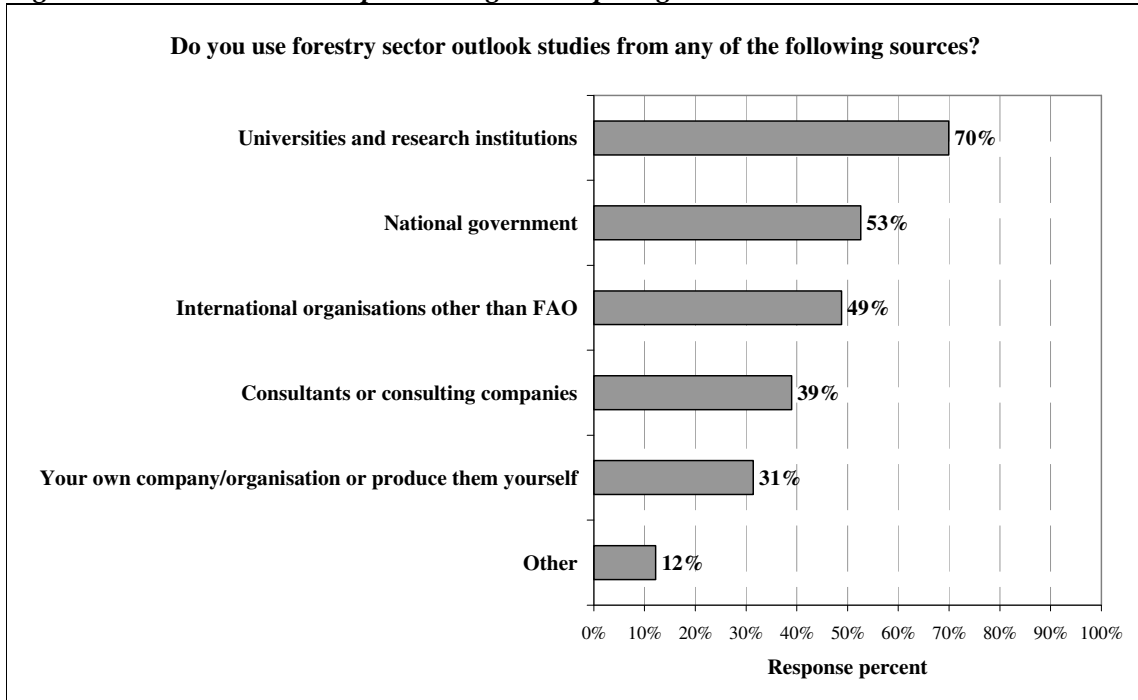
**Figure 7** *Quoting FAO Forestry Outlook Studies*



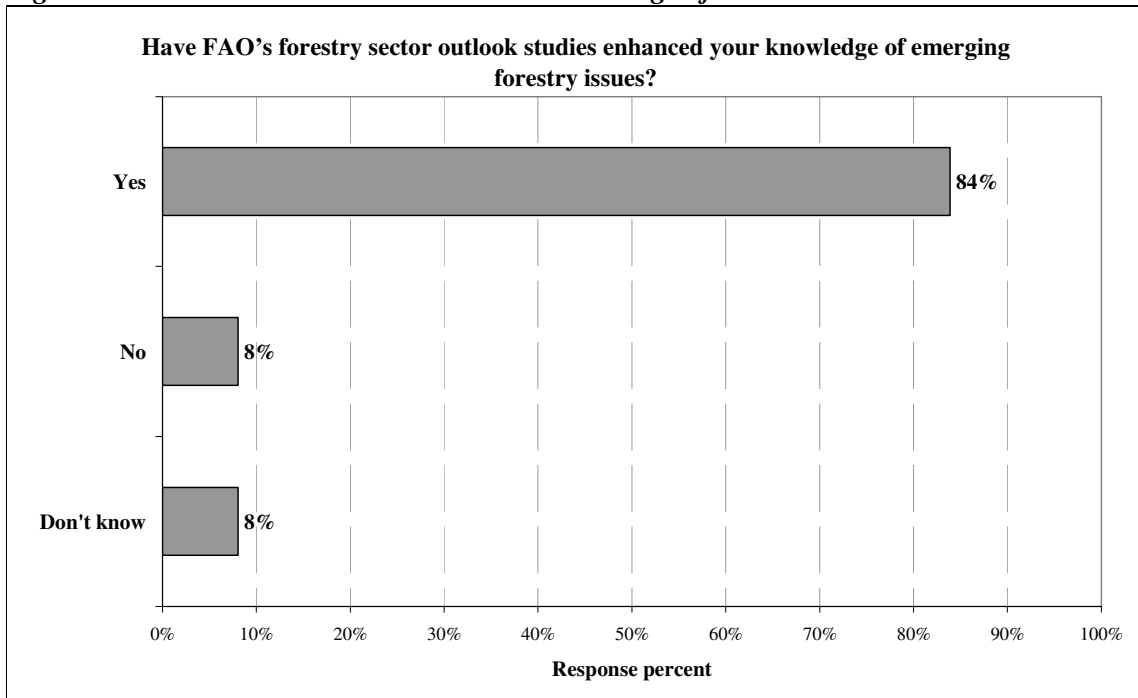
**Figure 8** *FAO Forestry OS position*



**Figure 9** *Other OS complementing or competing with FAO OS*



**Figure 10** *Have FAO OS enhanced the knowledge of users*



FAO mandate for future in the field of OS

Figure 11 Should FAO continue with Forestry Outlook Studies

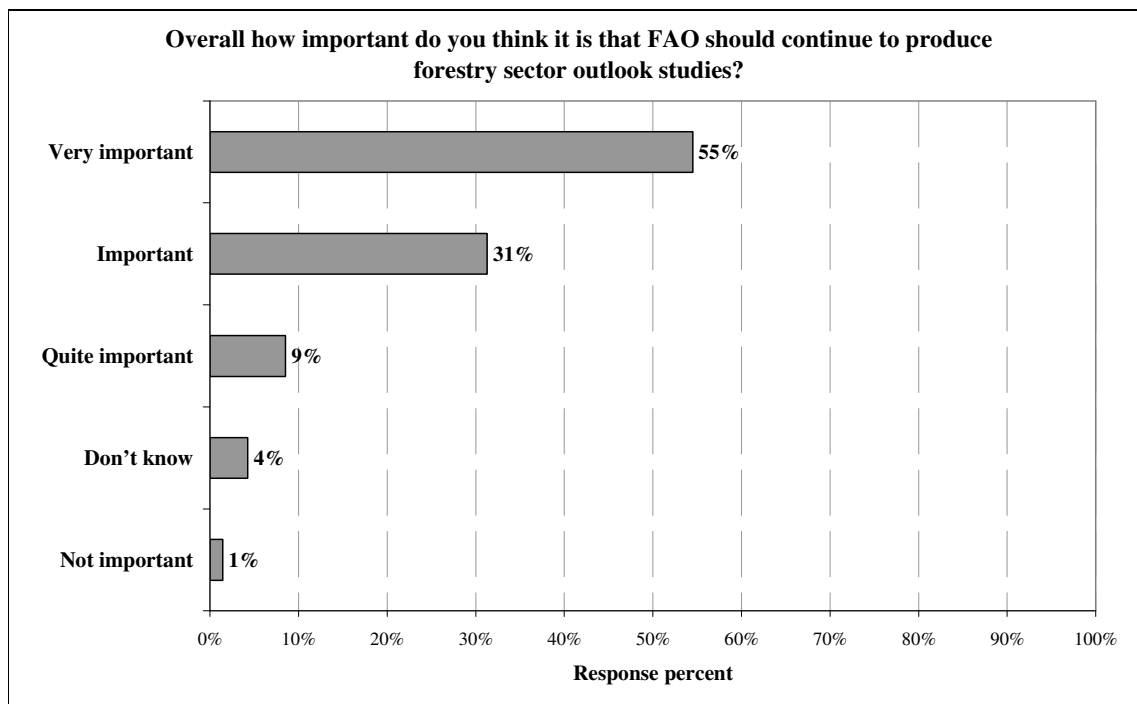
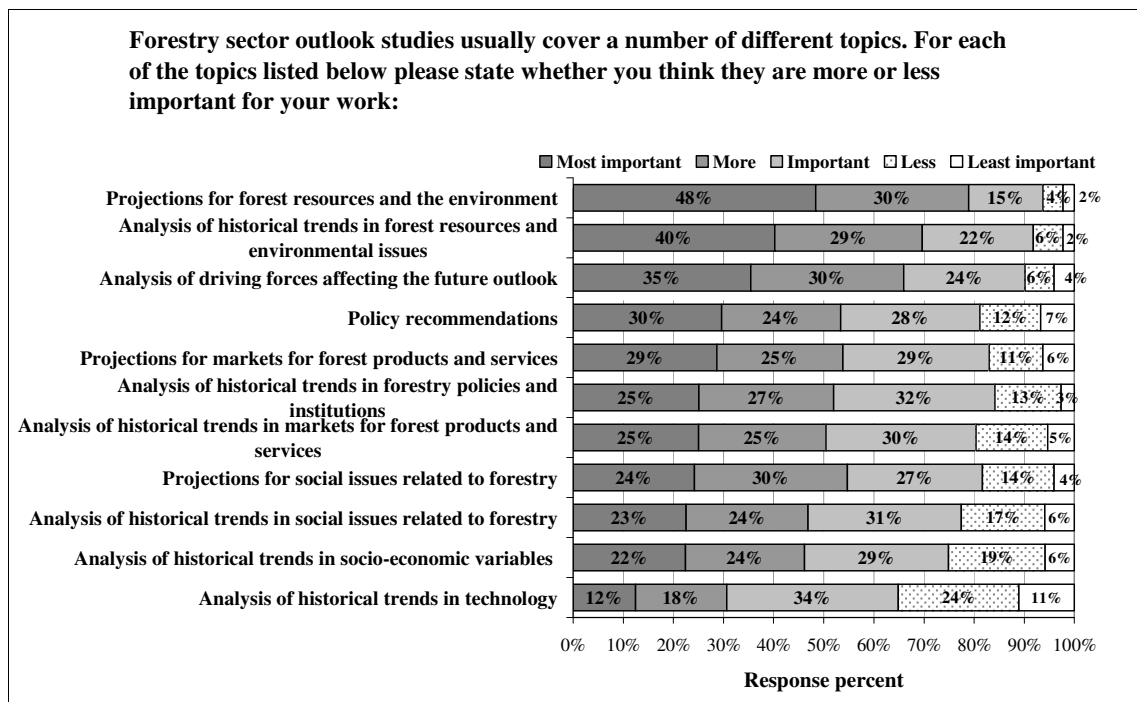


Figure 12 Suggested priority topics for FAO Forestry Outlook Studies



## Annex 1 RESPONSES BY COUNTRIES AND REGIONS

(number of responses)

Burkina Faso	1
Niger	1
West Sahelian Africa	2
Kenya	7
Sudan	2
East Sahelian Africa	9
Nigeria	3
Togo	1
West Moist Africa	4
Cameroon	5
Uganda	1
Central Africa	6
United Republic of Tanzania	1
Zambia	1
Tropical Southern Africa	2
Insular East Africa	0
Total: Tropical Africa	23
Algeria	1
North Africa	1
South Africa	4
Temperate Southern Africa	4
Total: Temperate Africa	5
<b>Total: Africa</b>	<b>28</b>

Bangladesh	3
India	8
Nepal	1
Pakistan	2
South Asia	14
Cambodia	1
Laos	2
Viet Nam	2
Continental Southeast Asia	5
Indonesia	2
Malaysia	4
Philippines	3
Singapore	1
Insular Southeast Asia	10
Total: Tropical Asia	29
Iran (Islamic Republic of)	1
Jordan	1
Turkey	1
United Arab Emirates	1
Uzbekistan	1
Yemen	1
Western and Central Asia	6
China	5
Japan	2
Republic of Korea	1
East Asia	8
Total: Temperate Asia	14
<b>Total: Asia</b>	<b>43</b>

Fiji	1
Papua New Guinea	1
Total: Tropical Oceania	2
Australia	13
New Zealand	4
Total: Temperate Oceania	17
<b>Total: Oceania</b>	<b>19</b>
Finland	8
Norway	3
Sweden	6
Northern Europe	17
Austria	4
Belgium	2
Denmark	3
France	6
Germany	9
Ireland	2
Italy	3
Netherlands	6
Portugal	2
Spain	3
Switzerland	3
United Kingdom	10
Western Europe	53
Czech Republic	2
Hungary	1
Poland	1
Eastern Europe	4
<b>Total: Europe</b>	<b>74</b>

Canada	16
United States	32
Total: Temperate North and Central America	48
Costa Rica	5
Guatemala	1
Mexico	2
Nicaragua	1
Panama	1
Central America and Mexico	10
Cuba	1
Caribbean	1
Total: Tropical North and Central America	11
<b>Total: North and Central America</b>	<b>59</b>

Brazil	7
Colombia	6
Paraguay	1
Peru	6
Venezuela	1
Total: Tropical South America	21
Argentina	1
Uruguay	1
Total: Temperate South America	2
<b>Total: South America</b>	<b>23</b>

<b>Africa</b>	<b>28</b>	11%
<b>North and Central America</b>	<b>59</b>	24%
<b>South America</b>	<b>23</b>	9%
<b>Asia</b>	<b>43</b>	17%
<b>Europe</b>	<b>74</b>	30%
<b>Oceania</b>	<b>19</b>	8%
<b>TOTAL</b>	<b>246</b>	
- tropical countries	86	35%
- temperate countries	160	65%

## **ANNEX II AUTO-EVALUATION OF FAO FORESTRY SECTOR OUTLOOK STUDIES WORK-PROGRAMME ELEMENT**

### **AUTO-EVALUATION OF FAO FORESTRY SECTOR OUTLOOK STUDIES WORK-PROGRAMME ELEMENT**

#### **Final Report of the Auto-evaluation Consultant**

J.E. Michael Arnold, 29 December 2004

#### **Coverage**

This survey forms part of a wider auto-evaluation by FAO of its programme entity “Forestry Sector Outlook Studies”. This covers studies produced within that programme in the past six years. Other components of the evaluation include a desk study of literature citations of the studies, an internet questionnaire survey directed at people who had received copies of one or more of the studies, and interviews with selected FAO staff.

The present survey, conducted through telephone interviews, was intended to explore the views of a sample of external users and persons involved in the preparation of the studies<sup>3</sup>, to be structured as follows:

##### *Opinion former and decision maker users*

People using the studies in a policy or strategy formulation, investment decision making, or knowledge dissemination, context. Interviews to focus on how they have used the studies and what the impact has been.

##### *Expert users*

People engaged in forest sector analysis who have used the FAO studies, or who produce similar studies. Interviews to explore perceptions of the quality of the FAO studies.

##### *Contributors*

People who have written part of, or contributed papers to, one or more FAO studies, or been involved in their preparation in some other way. Interviews to examine the effectiveness of the process of producing the studies, and interactions with the contributors’ own work.

The intention was to interview about 60 people, split evenly between these three categories. Interviewees were to be selected to provide as good a balance as possible by geographical region and professional interest (government, NGOs, academic, private sector, etc.).

A shortlist of potential interviewees in each of the three groups defined above was drawn up at a meeting between the consultant and FOPE staff at FAO on 11 November 2004. However, when contacted a substantial proportion of those initially listed proved to be not available, or declined to participate because they had had little or no exposure to any of the studies. The list

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<sup>3</sup> The terms of reference for the survey are shown in Annex I.

therefore had to be augmented from a reserve list, and from names of colleagues who were believed to have used the studies suggested by those who felt unable to participate. However, participation rates continued to be low in some groups of user and expert, as identified below, and summarised in the following table.

<b>Distribution of approaches and responses</b>					
Category		1	2	3	total
<i>total approached</i>		22	18	43	83
of which:					
<i>opinion formers</i>					
approached		21	15	18	54
no contact		2	4	5	11
no reply		4	4	3	11
users		5	2	4	11
slight users		5	1	1	7
not users		5	4	5	14
<i>experts</i>					
approached		0	1	13	14
no reply		0	1	5	6
users		0	0	6	6
not users		0	0	2	2
<i>contributors</i>					
approached		1	2	12	15
no contact		0	0	2	2
responded		1	1	9	11
no reply		0	1	1	2
<b>Notes</b>					
		1 = donors, development organizations, international NGOs			
		2 = national forestry administrations			
		3 = academic, research, consultants, private sector			

In total 83 people were approached for interviews. Thirteen of these approaches failed because the contact information available proved to be no longer valid and current contact details could not be obtained. Of those who were contacted, 73% replied. Of these, nearly a third reported that they did not use and had not used the studies – and a fifth of the users indicated that they had made only slight use of them.

Both the response rate, and the proportion of users who use FAO forestry sector outlook studies therefore proved to be lower than expected. Non-response and non-use was highest in the ‘opinion former’ user category, being particularly high among people approached in national forestry administrations. There was also a very low response from respondents from developing countries other than from Africa, and few responses from industry.

This report therefore primarily reflects information provided by users and practitioners from the donor/development and academic/consulting/research communities<sup>4</sup>. Such follow-up of non-responders as was possible in the time available suggested that many of the ‘opinion formers’ who did not reply were also non-users, or casual users who did not consider their level of use to warrant participation in the survey. It also seemed that there was a tendency among busy respondents not to participate when it would have required some homework on their part to re-acquaint themselves with the content of studies they had used – a circumstance that probably also suggests a low level of use.

Though fewer than initially hoped for, the interviews produced a substantial amount of material. Almost without exception, interviewees proved to be well informed and able to provide

<sup>4</sup> A full list of all those approached, and of responses received, is given in Annex II.

the information requested. The messages that emerged were generally clear and consistent across participants. The consultant was left with the impression that it is unlikely that larger samples from among those categories willing to participate in the survey would have generated a significantly different set of findings. However, the findings relating to categories where participation in the survey was low may be less representative.

Responses from those in the 'expert users' group tended to be similar to the responses by users classified as 'opinion former and decision maker users' or the responses from the 'contributors' category, and in total did not result in findings that could be distinguished from the findings for these two categories. In practice, therefore, the report relates to findings from two categories of involvement with the outlook studies – 'users' and 'practitioners' - and is structured to reflect this.

## **User responses**

### **Patterns of use and user**

The survey showed a marked degree of variation in outlook studies use from one organisation to another, and among individuals within a particular organisation. The categorisation below records the main categories of organisation within which examples of outlook studies use were encountered, and the main uses, but does not necessarily demonstrate broader patterns.

#### *Donor agencies, development organisations and large international NGOs*

Within some agencies and organisations, outlook studies were being used as an input into processes to formulate overall, regional and sub-regional forest sector policies and strategies, or to set targets for particular multi-country programmes and projects. They were also sometimes being used to provide briefing on the situation in individual countries. In a few organisations their use was routine in forest sector operations, more frequently use was confined to particular managers or analysts, and particular programmes. Examples of uses reported by respondents in the course of the survey included the following:

Use of FOSA in the African Development Bank in providing assistance to sub-regional bodies such as SADCC and ECOWAS in developing their strategies for the forest sector;  
Use of FAO forest resource, production, trade, and outlook data in the preparation of a goal statement and new targets for forest protected areas and sustainable forest management in World Bank client countries, for negotiations to renew the World Bank - WWF Alliance for Forest Conservation & Sustainable Use;  
APFSOS documents used as strategic inputs in identifying CIFOR research priorities in the region;  
The GFPOS plantations study used as a source document in a Conservation International assessment of the impact of plantations on the environment.

#### *National forestry administrations*

The small number of responses from this category means that the survey has identified no more than a few examples of use:

- In Japan APFSOS was used in monitoring broader regional supply availability and demand trends and developments;
- A number of respondents had used a regional study for briefing government departments, the private sector and national NGOs on broader forest sector developments within their region;
- Some gave examples of the use of a study as a source of information on practices in other countries relevant to what might be needed in the home country (e.g. forest legislation in Ghana, scenario forecasting in the UK);
- Regional studies have also been used by countries as background information for use in formulating their national positions at meetings of international forestry bodies such as UNFF and ITTO.

Examples also emerged of exercises in which a study would have been used if the respondent had known of its existence (e.g. APFSOS in a review of national forest policy in India).

#### *Research and consultancy organisations*

Some organizations engaged in development-related research in the forest sector reported quite extensive use of information from FAO outlook studies (e.g. METLA in Finland, CIRAD in France, Forest Trends in USA). Others cited little or no use (e.g. IIED and ODI in the UK). It was unclear whether these differences in levels of use were due to the type of studies respondents had engaged in, or to their familiarity – or lack of familiarity – with the FAO outlook study programme.

Respondents from consulting groups working mainly for the private sector proved to be major users of the studies, in particular for assignments requiring multi-country coverage, or/and analysis over relatively long time horizons. Among the uses described was that of helping potential new suppliers understand the functioning of the forest and forest products sector in the major consuming regions, and the requisites for successfully engaging in such markets.

#### *Education and advocacy*

Academic respondents emphasised that the outlook studies provide an important reference and teaching source for courses and texts on world forestry, and feature prominently in university forestry libraries. It was argued that this can impact on a large number of foresters and others concerned with the forest sector. One European academic who has been a principal adviser to his country's forestry aid programme for many years, commented that much of the knowledge about developments in the forest sector that he had been able to bring to the latter resulted from his use of the outlook studies in developing his teaching courses and materials.

Several of the respondents were individuals who feature prominently as speakers and paper authors at international forestry and forest-related congresses and conferences. All identified the outlook studies as being among the main sources that they draw upon.

Impacts of outlook studies therefore appear to be largely indirect; through the policy documents, consultant and research reports, conference outputs, etc., that are shaped in part by using inputs from outlook studies. As such the impacts are difficult to identify, and even more difficult to measure. Very few respondents managed to identify specific impacts resulting from use of an outlook study.

A number of respondents made the point that, though they made little direct use of the study, they had benefited from being involved in the process of developing the study for their region. It was also argued that the wide spread of such involvement in the preparation of recent studies had been useful in getting people to think about the issues confronting the forest sector.

### **Strengths and competitive advantages**

Those among respondents who did make substantial use of outlook studies had clear and generally consistent views on their value and usefulness, with the same points about their usefulness recurring time and again:

- FAO deploys an unrivalled forest and forest products data base – no other source yet compares with it;
- FAO data and studies have a credibility that others lack (a point made by many) – being frequently characterised as unbiased, providing outputs that do not pursue a particular agenda, developed through a transparent process, and freely available;
- Outlook studies provide long term, multi-country analysis not available elsewhere, and assemble and present huge amounts of information that would be very difficult to access otherwise;
- Outlook studies draw upon FAO's position as the leading world forestry agency, and the one that can most effectively place forestry within the context of broader agriculture and land use situations.

As is evident from the above, the findings provide little evidence that users have access to other comparable sources of forest sector outlook analysis<sup>5</sup>. Even those working on forest product and forest sector analyses for private industry pointed out that these largely rely on FAO data, do not have the same temporal or geographic coverage, face the same methodological problems, and are very costly. Where the competitive advantage of private sector analysis is seen to lie is in being better able to address rapid short term changes, such as is occurring in China, and market analysis.

### **Shortcomings and limitations**

The most frequently voiced user criticism of the outlook studies is that their content is not effectively disseminated, and is not made available in sufficiently accessible and easily assimilable forms. This has a number of dimensions:

- The fact that they exist is not well advertised outside the meetings at which they are launched. This seemed to be confirmed by the surprising number of persons contacted who stated that they had not known about the existence of a study, or in some cases of the FAO forest sector outlook study programme at all. This included a number of people in positions where they depended on information of the kind that the outlook studies provide<sup>6</sup>, and who were using FAO forest resource, production and trade data, under the impression that this was all that was available;

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<sup>5</sup> A few respondents stated that they also drew on the Global Forest Watch data from WRI.

<sup>6</sup> For instance, the analyst responsible for the review of the forest sector for India's Ninth Plan in 2000 (who had not known of APFSOS), the head of studies in a large forest industry corporation who monitors plantation developments in competitor countries (but was unaware of the GFPOS plantation study), the person at WWF responsible for that

- Their findings are not widely broadcast and consequently are not available to or taken into account in other related sectors;
- It is not always clear who the intended target audience for a study is.
- They are large, dense, very technical reports not easy to read or extract information from, and are therefore likely not to be read by busy people in key policy and decision-influencing positions (several respondents stated that they have the studies but have not read them);
- FAO does not do enough to take the outputs down to the country level and help explore their implications at that level. This was a concern expressed particularly by respondents when discussing Africa;
- The information they contain is less clearly presented, and is less readily accessible, than FAO's forest resource assessment and yearbook data; as a result many turning to FAO for country and multi-country information use these rather than outlook studies.

Combinations of these factors would seem to explain a large part of the low level of use, and awareness - it was notable how many respondents dwelt on this issue. It was also argued that lack of awareness of findings from the FAO forest sector outlook studies contributes to the low profile of forestry in broader policy initiatives such as country Poverty Reduction Sector Papers.

Another comment made by several respondents was that the analysis in outlook studies is often overly cautious and too concerned with government and industry sensitivities.

The point was also made by several that the findings tend to date quite quickly, so that they have a rather short shelf life as source documents for policy analysts and decision makers.

A frequent comment, advanced not as a critique but as explanation for the limited use of outlook studies, was that the respondents seldom need information in the depth and over the time scales that the studies provide. Often they need little more than information that illuminates the present situation, or access to resource, production and trade data that they need in order to be able to carry out more limited short term analyses of their own. A related comment was that the outlook study outputs may need to be tailored more closely to the needs of the different audiences they serve.

## **Practitioner responses**

About two thirds of the respondents who commented on methodology and process aspects of the FAO outlook studies were from the 'contributor' category. However, many of the 'expert users' who participated in the survey had also had some involvement in one or more of the studies, and commented on these aspects of the studies. In practice the two groups therefore constituted a single 'practitioner' category. Many of their comments related to recent work on the FOSA and EFSOS studies.

## **Methodological issues**

The principal concern expressed by most respondents was about the quality of data used. Many respondents expressed the view that not only is this not getting appreciably better, in some situations it is getting worse. For instance, in parts of Africa where there has been little ground

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organisation's work on plantations (not familiar with the GFPOS study), the head of the forestry research group at ODI.

surveying in recent years, and increasing reliance is being placed on information from satellite imagery. It was stated that even in Europe internal inconsistencies between raw material and processing data sets indicate that there are still substantial weaknesses in the data situation.

It was widely argued that higher priority within the overall outlook programme needs to be given to improving the basic data. Most interpreted this as needing more FAO assistance to countries in developing their data generation practices;

Some argued that FAO needs to develop its own data series, rather than relying on unreliable data supplied by governments<sup>7</sup>;

Given the uncertainties surrounding the reliability of data used, some respondents said that the studies should provide more commentary on the sources of the data used, with comparison of different sources of data, and explanation of the reasons for choosing the information employed.

Some also said that individual outlook studies had failed to make use of all the data that was available – for instance, arguing that there is more information on forest management in Africa than was used in FOSA.

The improvements that have been made in the analytical models, and the structural changes to accommodate the growing importance of non-timber functions and values, were generally welcomed. However, a number of concerns were raised:

The comment was made that there is considerable variability in the quality of the analyses and in the underlying formulation of analytical and projection models, across the different FAO forest sector outlook studies. Some argued that where the data continues to be poor it is not logical to use such sophisticated models. Others felt that outputs from models created to explore relationships at the global level were sometimes being used to provide findings for smaller geographical or product categories for which these relationships may not be as strong; Some also expressed the view that, if the outlook studies are now intended primarily as an input into policy processes they are overly detailed, providing much more than policy analysts and decision makers need, or can use. It was argued that less elaborate approaches and simpler methodologies could be more appropriate;

Others were concerned that the resource and demand-supply components of studies, and the work to generate data in these two areas, have not been sufficiently integrated within FAO. Another concern was that more attention needs to be given to analysing and forecasting price trends

The view was also expressed that there is need for further updating of the global models developed in the 1990s, and that careful thought should be given in designing this work to the appropriate balance between building up specialised capacity in-house within FAO, and contracting out to research groups in universities. Concerns were expressed that the latter are seldom assured of continuity of support from their parent institutions, and therefore might not be able to provide assurance that they could continue to take responsibility for such work in the future. However, some argued that it may be the dominant position that FAO presently occupies in this field that makes it difficult for other groups to build up a more substantial presence and

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<sup>7</sup> However, this contrasts and conflicts with the view expressed by several users that they found FAO data more credible than alternatives because it was based on material supplied by governments.

capability. Overall, most respondents who commented on this favoured a strengthening of partnerships between FAO and other expert contributors in this subject field.

### **Process issues**

The efforts that FAO, and ECE and its other partner organisations, have made to adapt the process of carrying out individual outlook studies to changing needs was acknowledged. Most respondents recognised that efforts have been made to incorporate lessons from carrying out one study into the management process of the next. However, there were comments about perceived shortcomings in individual studies:

- In FOSA the emphasis on initial consultation with countries, and use of country consultants, had left too little time or resources for subsequent discussion of the analysis as it developed with different stakeholder groups within each country. As a result some important factors, such as governments' budgetary constraints, had received insufficient attention. (As was noted earlier, some respondents also felt that not enough attention had been given to helping countries interpret and follow up the findings of this regional study.)
- In EFSOS, it had not been possible to adapt the process sufficiently to the rapid changes in priorities taking place, in particular in western European countries. As a result, it had become unclear who the 'customers' for the study now are, and what output they need;
- A more general concern is that the studies are very demanding for those taking part, with comments focusing mainly on difficulties contributors had had because they were largely working in isolation. Many, but not all, said that more interaction among contributors, and with the secretariat, was desirable (e.g. to ensure more discussion of results as these are being developed).

### **Future directions**

Virtually all respondents, even those who use them infrequently, stated that there is continuing need for analysis and projections for the forest sector, even though the threat of global timber and fibre shortages no longer threatens. Respondents pointed to the continuing need to monitor the supply and demand situation for major structural changes at the regional level, such as are evolving at present due to the rapid increases in demand in China. They also pointed to the importance of outlook analysis in providing information about potential changes in future prices. The importance of long term sector analysis work as a tool for monitoring changes, and likely impacts of changes, in the balance of different demands being placed on the forest sector was also emphasised.

Most also argued that FAO should continue to be taking the lead in producing such outlook studies. As was noted earlier, most users and practitioners consider that FAO has strong competitive advantages in this area, which no alternative provider is likely to be able to match. A number of developing country respondents also expressed concern that withdrawal from outlook studies would weaken FAO's capacity to provide leadership in the forest sector (a point that reflected a broader concern that emerged in interviews that the Organization's presence in forestry is diminishing, and that no other international organisation is providing a comparable replacement).

However, it was questioned whether, at their present low levels and frequencies of use, the outlook studies are cost effective. It was widely argued that FAO needed to examine how to

ensure fuller and wider use of the wealth of information and analysis that they provide. A number of approaches were proposed:

- An email network to alert a wide audience to new outputs, the gist of their findings, and identification of where to obtain follow-up material – for instance, something similar to the POLEXserv network of CIFOR;
- More proactive ‘marketing’ of outputs through shorter reader-friendly reports, journal articles, press releases and media briefings, etc.; outputs that are more easily accessible; and shorter reports that are more easily downloadable (some respondents referred to the way Forest Trends presents and disseminates its outputs to illustrate this point);
- Convening meetings devoted solely, or mainly, to presenting and discussing the findings of each new study;
- Providing more proactive support to individual developing countries, to assist them in interpreting and acting upon the findings from each study relevant to them.

There was not much support for the proposition that FAO might shift some of the resources that it has available for outlook studies, from carrying out regional studies to strengthening capacity for carrying out forest sector outlook analysis at the country level. The latter was seen as being desirable, but not at the expense of the multi-country studies. It was argued that the latter provide at least some policy guidance to countries where domestic capacity for such analysis is absent or weak, and likely to remain weak for some time, and therefore need to continue to be made available at least until that weakness is rectified. (It was suggested that where support is needed in a particular country that it should be provided through a separate project, rather than as part of the sector outlook studies programme.)

There was support for a greater focus on groups of similar countries – within regional frameworks. It was noted that this allowed more meaningful conclusions to be drawn than is possible for large heterogeneous regions such as Africa and Asia-Pacific as a whole. It also provided support to sub-regional planning and policy initiatives. However, some concern was raised that this could weaken the usefulness of outlook studies in providing needed analysis for a region as a whole where this is still needed (for instance in Europe).

There was also general support for a continued broadening of the focus of the work to take account of the growing importance of demands on the forest sector for goods and services other than timber and fibre<sup>8</sup>, and towards more analysis of the policy implications of the projections. However, it was argued that the extent and nature of the shifts that are appropriate vary considerably from region to region. Some in fact argued that, unless there is an intention to produce a substantive global study from the overall output, there should be less emphasis on developing the regional studies within a common framework, to allow them to be more closely tailored to the needs and possibilities of each region. It was suggested, for example, that the work on Europe would benefit from being put on a continuous basis, to make more effective use of the experience and mechanisms that have been built up, but which at present are largely disbanded between studies. In contrast, it was argued that the need for outlook information and analysis for the forest sector in North America is already provided by the USA and Canada, and there may be no need for FAO to also cover this region.

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<sup>8</sup> Though it was suggested that it was this shift that accounted for the declining interest of the forest products industries in the FAO forest sector outlook studies programme.

In short, many of the points raised about desirable changes in the FAO forest sector outlook studies programme tended to underline the need for the studies to identify their audiences more clearly, and to be better targeted to meeting the needs of these audiences.

## **Annex I: Terms of Reference for the Auto-evaluation Consultant**

### **Background**

The Forest Economics service of FAO will be evaluating past activities under the outlook studies component of the Forestry Department's work-programme. This evaluation will examine all of the regional and global outlook studies prepared over the last six years.

One component of the evaluation will be a telephone survey of experts and opinion-formers who are familiar with FAO's work on this subject. The auto-evaluation consultant will be recruited to implement this survey and produce a brief report of the findings of the survey.

### **Tasks of the consultant**

Under the general guidance of the Chief, Forest Economics Service and in close collaboration with the FOPE staff involved in the auto-evaluation, the Consultant will be responsible for the following tasks:

- Create a shortlist of potential interviewees (i. opinion formers; ii. expert participants; and iii. other experts on outlook studies), to give a reasonable balance by geographical region and professional interest (e.g. academics, government, NGOs, private sector, etc.).
- Design a simple structured interview format for each of the three groups outlined above, focusing on: i. the impact of FAO's outlook studies; ii. the process used to produce outlook studies; and iii. the quality of the final product.
- Implement the survey, to achieve a sample size of approximately 20 people in each of the three groups outlined above.
- Consolidate and summarise the results of the survey, producing a short (10 page) report of the results of the survey and a one-page summary of the main responses for each of the three groups.

**Duration:** 1 month  
**EOD:** November 2004  
**Language:** English  
**Duty station:** UK, with one trip to Rome for briefing (1 day)

**ANNEX III AUTO-EVALUATION OF FAO FORESTRY SECTOR OUTLOOK  
STUDIES WORK-PROGRAMME ELEMENT**

**Auto-Evaluation of FAO forestry sector outlook studies work-programme  
element**

*by*

*Andrius Mierkis*

*Forest Economics Service, Forestry Department*

January 2005

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## **SUMMARY**

One component of the auto-evaluation FAO forestry sector outlook studies (OS) is a survey of citations. This report reviews and analysis various findings citations in all of regional and global outlook studies prepared over the last six years, provides total number of OS reports printed and distributed, examine the number of visits to FAO outlook study web pages and compare these figures with other parts of the Forestry Department website.

The aim of report is to provide an approximately overview with an OS citations role and distribution in the literature, try to defend what key message of OS frequently interpreting in the publications and identify citations impact range for promoting, enhancing and shaping policy in the national, regional and global sustainable forest management way. Similarly, by guidance of OS citations survey overview whom, when, where and how serve OS outcomes in the literature.

In this auto-evaluation using a brief internet search tools, Forestry and main libraries was collected and processed 105 various references to FAO outlook studies. Findings citations were classify by date, type of document, type of end user and location. Appreciate citations useful by various impact trends it was divide in these main areas:

- citations impact to the public sector as overview of OS outcomes;
- citations impact to the private sector (industrial) to make investing decisions;
- citations impact as support to the national, international policy development and planning.

Also in this report were used FAO files and records for collecting information about the total number of OS reports printed, distributed, and examines the number of visits to FAO outlook studies webpage.

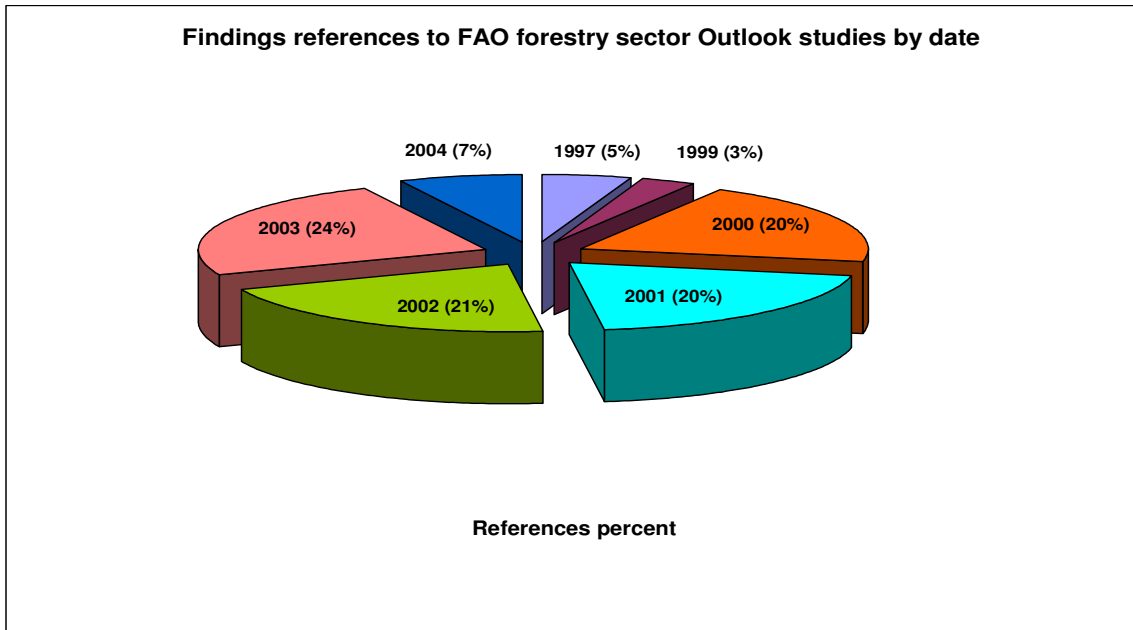
## **DISTRIBUTION OF FINDINGS REFERENCES TO FAO OUTLOOK STUDIES**

Around 105 references were found to FAO outlook studies using brief internet search tools, forestry and main libraries. Fundamental OS citations were detected in various types of journals, newspapers, books, workshops, conventions, projects, seminars, reports, presentations and other papers.

### **Distribution of findings references by date**

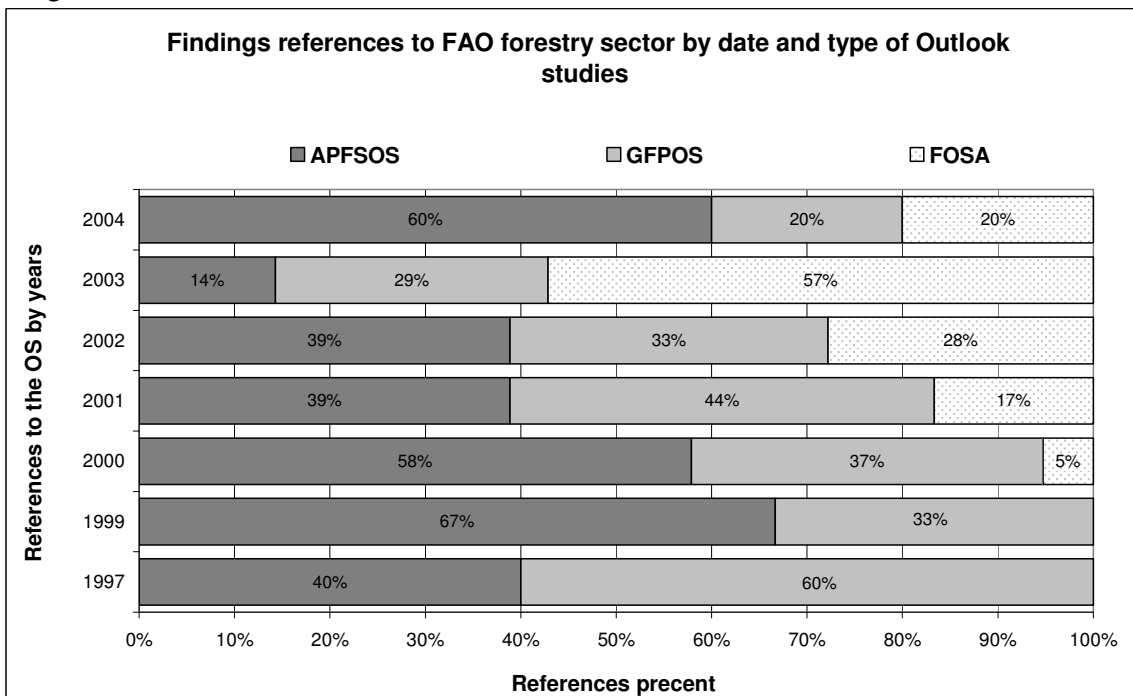
Finding references included eight years period<sup>1</sup>. Mostly OS in the literature were cited in 2000 and 2001 years (20% all findings citations), 2002 – (21%) and 2003 – (24%).

1. Figure



2 figure indicate what percentages of references compose appropriate type of OS in the separate years. Because in 2003 year was published the main Forestry outlook study of Africa (FOSA) report, therefore it's no wonder that most percentage share of findings citations compose FOSA in this year.

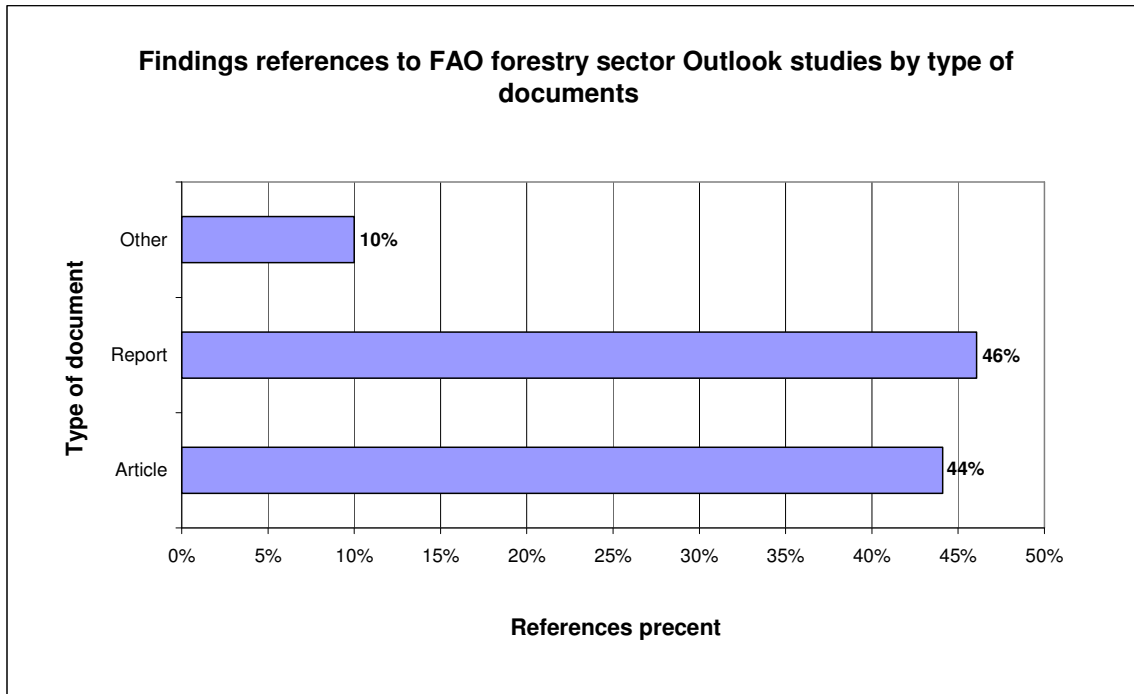
2 Figure



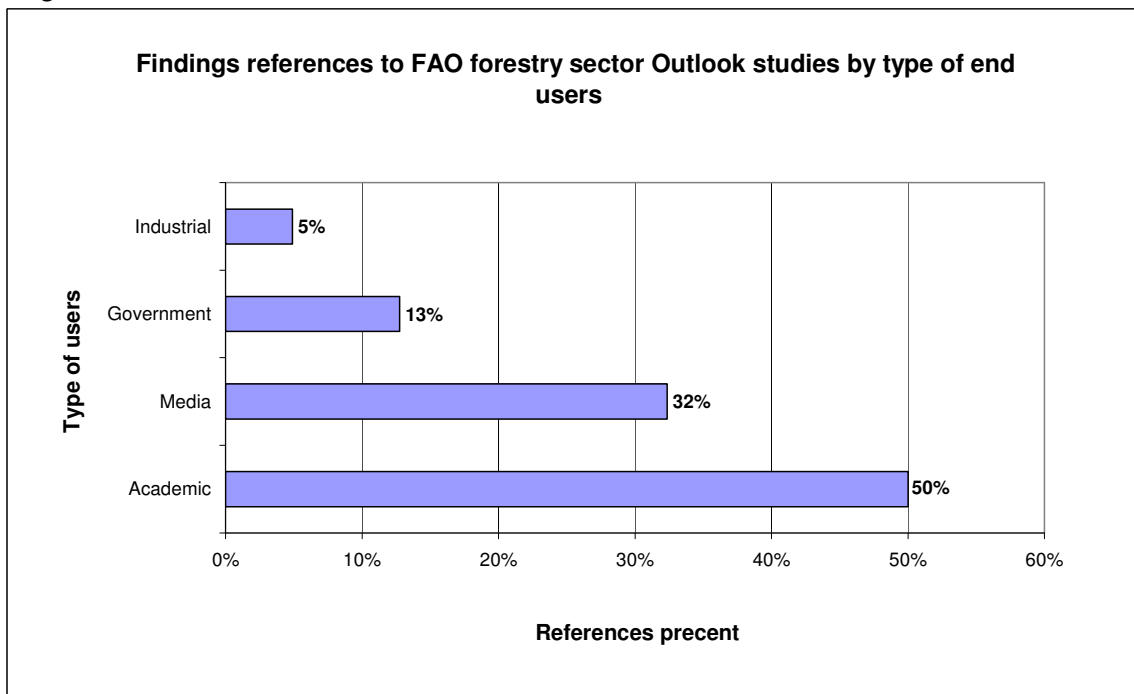
Distribution references by type of document

Major share of OS references were found in reports 46% (all findings references), articles – 44%. Section other type of documents includes workshops, reviews, editorial material.

3 Figure



4Figure

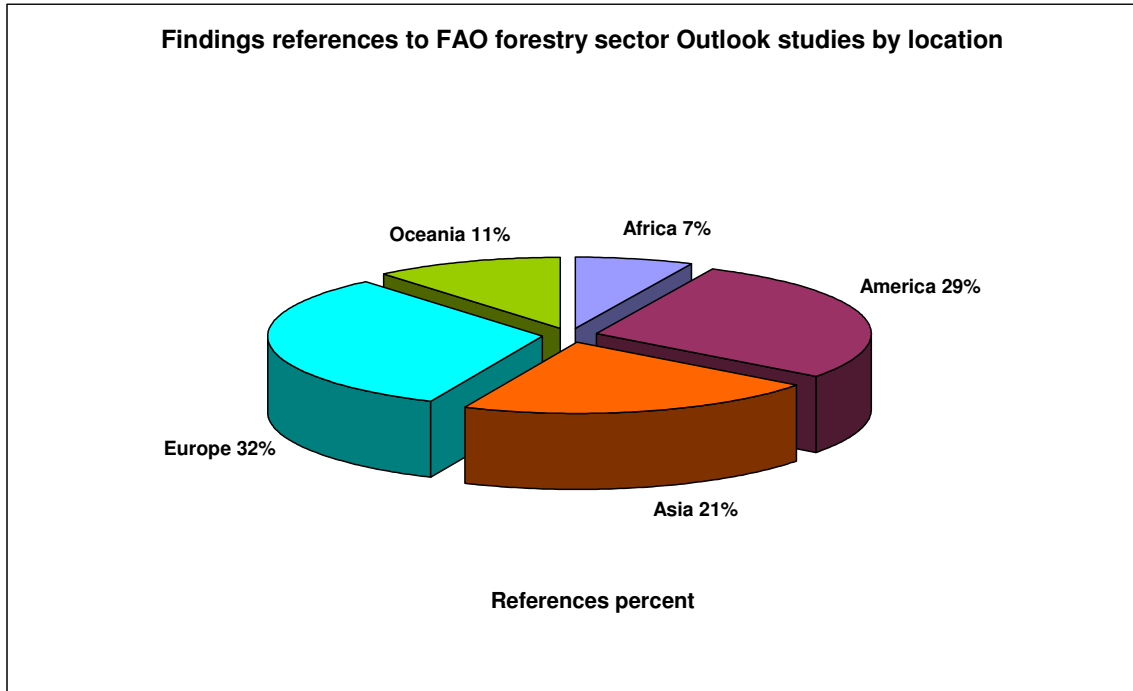


### Distribution references by type of end users

Distribution of findings references to FAO forestry sector OS by type of end users appreciate approximately, because in some cases end users included expected. Around half of all end users compose academics, which guideless OS material continues further researches.

### Distribution references by location

5 Figure



### *CITATIONS SURVEY BY THE IMPACT TRENDS*

Literature publications interpretive OS outcomes in the wide range, consequently citations impact trends divided in these areas: citations impact to the public sector as overview of OS outcomes, citations impact to the private sector (industrial) to make investing decisions, citations impact as support to the national, international policy development and planning. OS materials frequently were cited in literature publications for consideration such global forest challenges and issues: overcoming impediments to reforestation, depletion of forest resources, poverty alleviation and forests, sustainable development for forest management, strategies for reforestation and natural forest regeneration, conservation of biological diversity, protection of tropical deforestation, global forest loss and forest degradation, fuel wood and land use, deterioration of the environment, lobotomy mindset, future supply and demand for industrial wood products and ways to meet future challenges.

### Citations impact to the public sector as overview of OS outcomes

If appreciate by quantity, major findings citations belong to this area. Authors cited OS material with purpose to overview public sector with global environment challenges and opportunities. In that case citations serve to the public sector as information source. Significant publication emphasis compose to Forest outlook study of Africa (FOSA) challenges: African forest face further degradation unless new measures taken, warns of receding forest cover in Africa, forest area could decline further in the next 20 years and progress to protect forest for future generations will be slow, bad management in Ghanaian forestry sector. An OS citation focuses in consideration environmental, economic and social aspects of forest sector. Citations impact to the public sector as overview of OS outcomes is enough important because policy development and reform starts from action when obtain appropriate information and data.

### **Citations impact to the private sector (industrial) to make investing decisions**

Various publications using OS material stimulate investments in direct (plantations, processing and manufacturing) or indirect (equities, managed funds, superannuation schemes) forest and wood products industries which provide growth opportunities for investors. "Asia's new woods: expanding plantations of agricultural and industrial crops, such as rubber, coconut, bamboo, and oil palm, are providing important new "wood" sources for forest industries in Asia. Several of these new woods are becoming mainstream species in the manufacture of traditional forest products and in the production of innovative product lines in Asia. Technological improvements are permitting the use of previously wasted materials into plywood, particleboard, paper, and even lumber and furniture." "Plantations in Australia offer the best returns to investors" (potential investment opportunities associated with this resources) The core is that industrial sector obtains awareness of issues on the future wood balance, concern to make investing decisions in development wood technology, findings of natural forest wood replacement. In that case industrial sector assist to promote sustainable forest resource management.

### **Citations impact as support to the national, international policy development and planning**

Academics use Os information and statistical data in various reports, projects, reviews, workshops, seminars, conferences, articles, books for further researches. Findings citations indicate that academics, guideless OS material, continue further researches focuses on sustainability forest management for achieving environment, social, economic and human benefits.

The policy change process and policy decision are taken largely guidance researches outcomes and recommendations. In this section explore fields of support to the national, international policy development and planning, influence in policy change process. OS citations impact to the policy makers can be direct (policy change process guideless by OS outcomes base) and indirect (OS material included in other authors researches with aim to support for policy development and planning).

OS citations impact (direct and indirect) in supporting policy development and planning, were found in the following fields:

### **Environmental :**

- encouragement in the establishment of forest plantations;
- forest land administration system;
- convention on biological diversity;
- legal and regulatory aspects of forest fires;
- support wetland conservation;
- forest certification;
- strategies for reforestation and natural forest regeneration;
- protection of tropical deforestation;
- global forest loss and forest degradation.

**Economic:**

- issues European solid wood industry;
- national and regional wood supply forecasts;
- investing in the future, private sector and sustainable forest management;
- sustainable development for forest management;
- future supply and demand for industrial wood products.

**Social:**

- poverty alleviation and forest;
- management in secondary forest of lower Mekong subregion (supplemental livelihood products for millions of poor rural household);
- interaction between people and forest.

In the literature, sustainable forest management is a major theme of discussion on the policy and planning levels. Practically major literature publications (produced by guideless OS material) illustrated in different trends are closely relative with each other and have the same object – sustainable forest resource management to achieve environmental, economic, social benefits for present and future generations. Fundamentally, in the literature authors cited OS statistical data, outcomes. OS key messages frequently interpreting in the literature - challenges and issues of global forest resources depletion.

***INFORMATION OF TOTAL NUMBER OUTLOOK STUDIES REPORTS PRINTED  
AND DISTRIBUTED***

Around 2000 copies were printed and distributed of the Asia Pacific Forestry towards 2010 - Report.

1000 copies (12 Oct '98) printed here - 650 mailed to P. Durst + 350 kept here for distribution;  
500 copies (06 May '99) - printed here and sent for distribution, and  
500 copies (Dec 2001) - re-printed in RAPA.

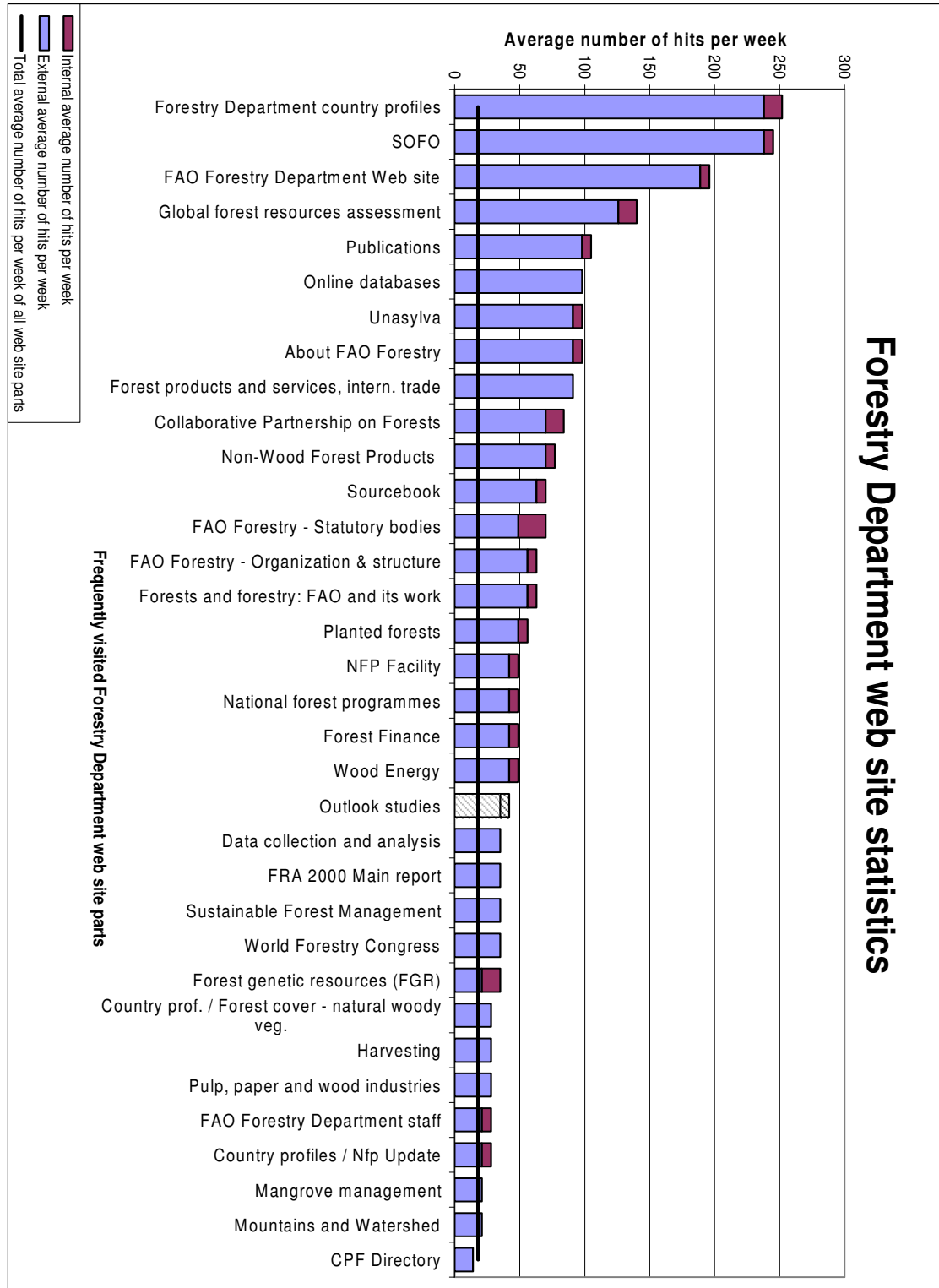
With regard to the Executive Summary - this was entirely handled by RAPA (RAP publication: 1998/22).

It looks like an average of 250 copies were printed for the various (50) Working Papers.

***EVALUATION NUMBER OF VISITS TO FAO OUTLOOK STUDIES WEBPAGE***

214 web pages compose Forestry Department website. 164 web pages official data were found for this evaluation. Around half of all findings web pages data indicate that average number of visits per week compose 0 hits. The best results show Forestry Department country profiles web page, which average number of visits per week - 259 hits (Figure 6). According 164 web pages data, Outlook study web page is in the 22 position by frequently number of visits. Outlook study web page average number of visits per week composes - 49 hits (external visits - 35 hits, internal - 7). Approximately total average number of visits per week of all Forestry Department web site parts (164) composes - 18 hits. In that case, OS visitors hits are more than twice higher than average of all Forestry Department web sites parts.

Figure 6



## **ANNEX IV AUTO-EVALUATION (OUTLOOK STUDIES) - RESULTS OF THE FAO STAFF INTERVIEWS**

### **AUTOEVALUATION (OUTLOOK STUDIES) —RESULTS OF THE FAO STAFF INTERVIEWS—**

37 FAO staff members were interviewed for evaluating the FO outlook studies (OS) as a part of the OS autoevaluation exercise. Most interviewees have read some OS reports. Few used them often or as their main source of information. In many cases, the OS was not used for outlook purpose but rather for general overview. On the whole, the OS had little impact on them or decision makers.

There were mixed opinions on the existing OS quality, depending on the users' needs. Most agreed to continue the OS in the future. However, many suggested changes to the future OS, such as creating mechanisms for regular updates and synergy with the other FO programmes, i.e. NFP and FRA, and employing a more effective means to disseminate the outputs to the targeted audience.

In short, the OS has not been fully utilized as it was aimed to. To improve the future OS, the crucial steps are to clearly define the target audience, design the OS in accordance with their needs, effectively market the outputs to them and establish a regular review/update mechanism.

#### **Method**

From 13 to 17 December 2004, 37 FAO staff members were interviewed for evaluating the FO outlook studies (OS) as a part of the OS autoevaluation exercise, including the ADG, Division Directors, Service Chiefs, Regional Officers and other professional staff in FO and a few staff in TC. Some HQs staff and most Regional Officers have actually involved in the OS production. Each interview took place for about 30 minutes based on the questionnaire attached as Annex1. The Regional Officers were interviewed over the phone, while the HQs staff was interviewed face to face. The list of interviewees is attached as Annex 2 (**List incomplete**).

#### **Evaluation of the existing OS**

##### ***Few considered the OS as a major source of information (OS read/used by the staff members)***

Almost all staff was aware of the OS. Unless their work required to consider global aspects (e.g. plantation, genetic resources and trade), OS reading and/or use was limited to those directly related to their interested regions/countries/topics. Most Regional Officers have read/used the regional/country OS only on their responsible regions/countries.

##### ***The OS was not used frequently or as outlook (Purpose of OS use)***

Quite a few staff members indicated that they have used OS for their technical work, especially as background information when developing work programmes, strategic framework and technical papers, and preparing for missions. The global OS users were interested in the future trends related to their interested subjects, while most technical officers using OS have used them to obtain general information on their responsible subjects/regions/countries. Most interviewees in the latter group did not specifically indicate their OS use for understanding future trends. In either case, the OS has not been used often or did not serve as their main source of information.

Other special cases included using the OS as one of the criteria for selecting recipient countries (i.e. if the country application to the NFP Facility referred to the OS, it was ranked high) and disseminating the OS report to relevant countries at meetings and other occasions. ADG has been

also politically disseminating the OS reports to relevant senior-level clients to raise their awareness, i.e. externally to senior government officials including ministers and internally to DG and DDG.

#### *Is the OS irrelevant to some officers? (Reason for not having used the OS)*

There was several staff who has made little or no use of OS. The main reason why they have not used OS was that they considered the OS not relevant to their technical work and/or the regions/countries they cover or simply did not have time to read. One new FAO staff indicated that she was not aware of the OS at all, partly because her previous assignment did not require OS inputs. Moreover, one noted that in FO, no one cared about the future vision and therefore, the OS did not serve as a tool for strategic planning.

#### *Satisfaction is in proportion to expectation (Satisfaction with the existing OS)*

In general, satisfaction with the OS seemed to depend on the degree of use and expectation. Some have been satisfied with the quality of the studies, while others considered not satisfactory in depth, i.e. the OS was too general. Some noted unequal qualities of the country OS. A few staff considered the quality of the existing OS insufficient because it did not take into account or fully address some technical issues e.g. forest fire, wood energy and non-wood forest products. Some indicated that due to the outdated information, the degree of OS use was gradually declined.

#### *Various weakness and some strengths (Strengths and weaknesses of the existing OS)*

Many identified its comprehensiveness as a major OS strength, though some felt opposite that the OS covered too many issues, making things complicated. The other perceived OS strengths included: networking among the countries; involving more people in the process; providing good country overview where no such information existed; presenting future perspectives; and employing a scenario approach.

The perceived OS weaknesses included: no OS use by decision makers (at the country level); weak data and methodologies; unclear OS objectives/focus; failure to deliver the message in short and precise way; too-long and voluminous report; weak analyses on the future prospects; too-long OS process; difficulty in understanding the linkage among the different regions; biased views toward the governments' perspectives; little involvement of the African Wildlife Commission; resource constraints that resulted in less in-depth analyses and the weak scientific base; no follow-up to facilitate the recommended actions; lack of country ownership or little benefit to some countries; and lack of the sense among the FO staff that the OS was the FO product.

### **Suggestions for the future OS**

#### *Should the OS really be continued?*

When questioned whether FO should continue the OS in the future, none opposed to discontinue the OS, but a few indicated conditional continuation e.g. only when there is external demand for the OS (i.e. too expensive only for internal demand) or a clear OS objectives. An interviewee raised a question for whom and of whom the OS has been carried out.

Although most agreed to continue the OS, many suggestions were made for changes to the existing OS as follows.

#### *No follow-up after the reporting—create a regular OS mechanism*

Many interviewees observed the lack of follow-up activities after completing the OS report writing. Disagreeing with such one-shot activity, many suggested making the OS a continuous, long-lasting process, in which it would be regularly reviewed, revised and evaluated against what have actually happened some time after the publication. One noted specifically to update the methodology, statistics and interpretation in such a cycle. It was also proposed that countries create their own system to regularly review the OS and FAO facilitate the implementation of the OS recommendations.

### *There has been no good OS marketing—create better dissemination/marketing mechanisms*

Some were satisfied with disseminating the OS mainly through the Committee on Forestry (COFO) and Regional Forestry Commissions (RFCs), while others argued that more proactive dissemination was necessary. The latter claimed that: COFO and RFCs invited only the forestry community and therefore, the OS could not be discussed with a wider participation from other sectors; in addition to these statutory bodies, workshops/meetings should be held to disseminate and discuss the OS at the country (and regional) level (also using the existing communication platforms); such workshops should be held even before the official publication for making the people anticipate the OS publication (e.g. CIFOR has been successful with this approach in selling their publications); the OS should be publicized through various means e.g. flyers, forestry journals; the OS summary should be included in SOFO; and the original OS should be targeted to general decision makers, while repackaging it for technical professionals.

One noted that when presenting the regional OS to the countries, they could not relate themselves to the regional study, because it discussed a whole region, while indicating little relation to the individual countries. Others noted that there has been no mechanism to encourage officials to use the OS. Most interviewees implied that the OS profile was very low. One suggested making the OS more visible as one of the FO corner stones along with FRA, Forest Products Yearbook and NFP.

### *10-year vs. 5-year cycle*

There were mixed opinions with regard to the OS cycle, i.e. 10-year vs. 5-year. Those for a 10-year cycle argued that trends in the forestry sector would not change very rapidly and therefore a 10-year cycle was sufficient. Those for a 5-year cycle claimed the opposite, i.e. changes happened quickly and 10 year would be too long to capture them. Another supporters for a 5-year cycle claimed that the OS could be rapidly outdated and also 10 year could be too long for the governments to utilize the OS, as they usually make plans every 5 years or so. Other suggestions included making the OS cycle coinciding with FRA (see more below).

### *Mixed preference to geographical coverage*

There are mixed opinions on whether the future OS should cover all different geographical levels, i.e. global, regional and country OS. Although most interviewees agreed with continuing the OS at all levels, many had preferences one level over the other. Some argued that country-level OS should be strengthened to build the country capacity and the regional/global OS would benefit from good country data. In contrast, it was noted that when the countries did not have capacity or interest in the OS, it was very difficult to encourage them to undertake the OS and such difference among the countries should be considered.

Others argued that countries should undertake OS by themselves and that the FAO assistance to countries should be somewhat limited. Some also suggested selecting some key countries instead of covering all the countries and/or favored placing more emphases on the global/regional OS. A few suggested to group countries into sub-region, smaller than the existing OS regional coverage.

There was an idea to undertake different regional studies at the same time to better understand the linkage among the different regions. These differences seemed to depend on the interviewees' responsibility, i.e. if one focused on work at the country level, he/she was inclined more to the country OS.

#### *Suggestions for the change in the OS content*

Although all agreed to employ both quantitative and qualitative analyses, there were mixed opinion on the quantitative analyses, i.e. some preferred to have more quantitative analyses with more data, while others questioned the accuracy of such projections. There were pros and cons to what extent the future OS should employ quantitative data. One questioned whether it relevant to keep as the "forestry sector" OS, because forestry has not been standing along but rather integrated into another sphere e.g. natural resource management.

Other comments included: producing some OS focusing on the specific issues more in depth in addition to the regular OS; allocating more resource for the OS; and presenting the OS outputs not in a compulsive manner to avoid readers' rejection to such coercion. Other suggestions include

#### *More involvement of other professionals and partners in the process*

Some staff was not satisfied with the past OS processes. A few argued that though their fields and expertise would have contributed to the OS, they were not sufficiently consulted by the OS team during the process and consequently, their expertise was not taken into account or well addressed in the outputs, e.g. wood energy. They suggested involving more in-house professionals in the OS process. Another claimed that a wider technical review was not conducted before publicizing the draft and therefore recommended to ensure such review in the future. There was a suggestion that FO might need to investigate potential partner organizations/programmes to undertake the OS together, including the development banks.

#### *Can the OS work closely with the other FO programmes?*

Some suggested that the OS should be closely linked to the other FO programmes, i.e. FRA, NFP and NFP Facility, e.g. coinciding the OS cycle with the FRA cycle, incorporating the OS as a good basis for NFP activities at the country level.

Some did not have time to read the voluminous OS reports and suggested to create a short, concise summary, even having a synergy with the other similar activities, such as the DG brief, NFP Updates and FRA.

#### *Methodologies should be established and refined*

Some questioned the current OS methodologies and whether FO had enough capacity to provide good technical assistance to the countries. One suggested that we should be open to criticism and improve the OS methodologies regularly, as he considered the current methodology very personal. Another proposed to place more emphases on developing the OS methodologies and its training package.

A question was raised whether the future OS should employ an passive approach (i.e. how the forestry sector would be according to the scenarios) or a more proactive approach (i.e. this is what the forestry should be and what needs to be done to realize such vision).

### Conclusion

A series of interview revealed that the OS has not been fully utilized as it was aimed to. Considering the users' opinions, the OS team should take the following steps to improve the OS:

- Clearly identify the target audience;
- Design the OS in accordance with their needs (e.g. contents, methodologies, analyses and study coverage);
- Create effective marketing instruments to deliver the OS to the targeted audience; and
- Establish a regular review and update mechanism.

To realize these steps, the OS team also needs to consider the resource allocation and the staff arrangement.

## **Annex 1. Questionnaire for autoevaluation (outlook studies)**

### Establishing the context

Have you read any FO outlook studies? If so, which ones have you read?

If the answer is YES = questions A, B, C

If the answer is NO = questions D, C

### A. Purpose for using outlook studies

A-1 Have you used them often?

A-2 What do you use it/them for? [in what context do you use it?]

A-3 Is it a main source of such information for you? Are there other sources that you use as well?

A-4 What messages did you receive from the outlook study?

### B. Satisfaction with/impact of FO outlook studies

B-1 Was it in sufficient depth/clarity, readily accessible, timely? (Quality)

B-2 What impacts/changes were brought about from the outlook study (in your work)?

B-3 Perceived strengths and weaknesses

### C. Importance of future FO outlook study work

C-1 Should FAO continue outlook studies? If FO is not providing outlook studies, where would you get such sector level information from?)

C-2 Should FAO be concentrating on providing regional/global outlook studies, or on helping build local capacity to carry out outlook studies at the country level?

C-3 Would you suggest any changes in content or/and frequency of FO OS?

C-4 Are there any ways you could suggest to create better communication on the future direction of forestry?

### D. Reason for not having used outlook studies

D-1 Why have you not read FO outlook studies?

**Annex 2. List of interviewees for autoevaluation (outlook studies)**  
(by order of interview)

1. Thomas ENTERS
2. Chris PRINS
3. Mette WILKEY
4. Michael MARTIN – FOND – Director
5. Carlos CARNEIRO – Regional Office (CHILE) – Senior Forestry Officer
6. Rosalie MCCONNELL – FONL – Forestry Officer
7. Pape KONE
8. Patrick DURST – Regional Office (BANGKOK) – Senior Forestry Officer
9. Hassan ABDELNOUR
10. Yves DUBE – FONP – Forestry Officer
11. Jim CARLE - FORM - Senior Forestry Officer
12. Peter HOLMGREN – FORM – Chief
13. Volker SASSE – Regional Officer (Hungary) – Forestry Officer
14. Eva MULLER – FONP – Chief
15. Oudara SOUVANNAVONG – FONP – Senior Forestry Officer
16. Claus ECKELMANN – Regional Officer (Barbados) – Forestry Officer
17. Eduardo MANSUR – FONP – Forestry Officer
18. Dominique REEB – FONP – Senior Forestry Officer
19. Simmathiri APPANAH – Regional Officer (Bangkok) – NFP Advisor
20. Doug WILLIAMSON – FORC – Forestry Officer
21. Mike JURVELIUS – FORM – Forestry Officer
22. Miquel TROSSERO – FOP – Senior Forestry Officer
23. Tadashi SHIMIZU – FONP – Forestry Officer
24. Mafa CHIPETA – TCAD – Director
25. Andres SIMON – TCIW – Natural Resources Management Officer
26. Ed PEPKE – Liaison Office Geneva – Forestry Officer
27. Michelle GAUTHIER – FORC – Forestry Officer
28. Richard OWEN – TCIL – Forestry Officer
29. Thomas HOFER
30. Pieter VANLIEROP – FONP – Forestry Officer
31. Doug MCGUIRE – FORC – Senior Forestry Officer
32. Laura RUSSO – FOP – Forestry Officer
33. Pierre SIGAUD – FORM – Forestry Officer
34. Wulf KILLMANN – FOP – Director
35. Hosny EL-LAKANY
36. Syaka SADIO – FORC – Forestry Officer
37. Francois WENCELIUS – FON – Manager NFP Facility