

HABITAT



An Organizational
Perspective

**South-East European
State Forestry:**
An Organizational
Perspective

2023



South-East European State Forestry: An Organizational Perspective A Study commissioned by European State Forest Association (EUSTAfor), represented by its Executive Director, Mr. Piotr Borkowski, European Forestry House, Rue du Luxembourg 66, 1000 Brussels, Belgium to HABITAL ENVIRO LTD, represented by Maja Radosavljevic, Alekse Nenadovica 19, Belgrade Serbia.

TABLE OF CONTENTS

| | |
|---|-----------|
| I. EXECUTIVE SUMMARY | 1 |
| II. ALBANIA | 3 |
| III. BELARUS | 14 |
| IV. BOSNIA AND HERZEGOVINA | 23 |
| V. CYPRUS | 36 |
| VI. GEORGIA | 43 |
| VII. GREECE | 53 |
| VIII. MOLDOVA | 63 |
| IX. MONTENEGRO | 73 |
| X. NORTH MACEDONIA | 80 |
| XI. TURKEY | 88 |
| XII. CONCLUSIONS AND RECOMMENDATIONS | 97 |



I. EXECUTIVE SUMMARY

State Forest Management Organizations (SFMOs) play a crucial role in overseeing state-owned forests, which are a significant part of Europe's forest cover. These organizations have a profound impact on the larger forestry sector, as they are responsible for maintaining the health, resilience, and productivity of forest resources. Sustainable forest management requires balancing various, sometimes conflicting, demands such as biodiversity preservation, resource productivity, and fulfilling social functions.

SFMOs are responsible for translating forest-related legislation into actionable strategies. By doing so, they not only contribute to the responsible management of forests but also to the sustainable supply of renewable resources. The multifaceted expectations of society make it challenging to achieve sustainable and multifunctional forest management, but SFMOs continuously strive towards this goal.

However, there are obstacles on the path towards sustainable forest management. European SFMOs face political, institutional, and financial challenges, which require comprehensive policy designs at the levels of the European Union, national governments, and international cooperation. Across European nations, state forest administration can be organized in a variety of ways, ranging from integrated institutions to diverse state bodies, each striving to uphold the principles of sustainable forest management.

It's important to recognize that European forests are owned by approximately 16 million individuals and entities, spanning both private and public sectors. Within the European Union, private ownership accounts for about 60% of the total forest area, with public ownership making up the remaining 40%. Public forests are typically held by municipalities, regional authorities, or national governments, and their management is often aligned with political, societal, and business objectives. In contrast, private forests, especially those in small-scale ownership, present a diverse landscape of approaches. This spectrum ranges from active participation in the market to maintaining self-sufficiency through forest resources, preserving forests as familial investment reserves, demonstrating altruistic intentions, or even opting for a complete lack of forest management.

I. EXECUTIVE SUMMARY



EUSTAFOR is a vital platform that unites state forest management organizations in a shared mission of knowledge sharing and collaboration. With 37 members from 26 countries, EUSTAFOR strengthens the collective voice of European state forestry. In addition, HABITAL's analysis of forestry sectors in East and Southeast Europe aims to provide valuable insights into state forestry structures, legal compliance, socioeconomic factors, challenges, and prospects for future development.

In September 2023, Ursula von der Leyen, President of the European Commission, underscored the European Union's reliance on the reforms, rule of law, and economic progress of Western Balkan nations for expansion. She refrained from specifying the date for the next European Day of Welcomes, possibly to manage expectations, given Charles Michel's, President of the European Council, hint at a 2030 accession timeline. Von der Leyen debunked the notion that EU membership is a mere formality, emphasising the crucial link between economic success and accession. However, the final decision rests with all twenty seven EU member nations, necessitating unanimous agreement.

Together, SFMOs and their partners are committed to safeguarding the treasures of Europe's forests. They recognize the ecological, economic, and social significance of forests and are dedicated to preserving their vitality for generations to come.

The study "South-East European State Forestry: An Organizational Perspective" overviews the state forestry sectors in ten selected Southeast European countries. It covers various aspects, including country profiles, general information on the forest fund, analysis of national legislation, organization of the state forest sector, and socioeconomic considerations. It concludes by discussing future developments in EUSTAFOR and the selection of potential members.

II. ALBANIA



ABBREVIATIONS

ALFIS - Albanian Forest Information System

ANFI - Albanian National Forest Inventory

EC - European Commission

EUDR - European Union Deforestation Regulation

EUTR - European Union Timber Regulation

FLEGT - Forest Law Enforcement, Governance, and Trade

GEF - Global Environment Facility

GDP - Gross Domestic Product

INSTAT - Institute of Statistics in Albania

IPA - Instrument for Pre-accession Assistance

MTE - Ministry of Tourism and Environment

NFA - National Forestry Agency

SIDA - Swedish International Development Cooperation Agency

SWG - Regional Rural Development Standing Working Group in South Eastern Europe

II. ALBANIA

Albania, situated in the southern reaches of Europe, occupies a strategic position on the western side of the Balkan Peninsula. Across the Adriatic Sea to the west, Italy lies just 80 km away, forming a close and enduring neighbourly bond. The total surface area of the country is 28.748 km² with a population of 2.846.000 million inhabitants, GDP in 2020, was 4.680 euro per capita (European Commission, 2022).

In 1991, Albania initiated a transition from a centralized communist system to a free-market economy. The forest sector has borne a disproportionate burden during this transition compared to other industries. Decentralization reforms in the forest sector are considered a strategic approach to address the unsustainable management of natural resources, including forests (SWG, 2023).

Albania's landscape includes about 1 million ha of forests and pasture that stretch over 50% of the country's surface area.



Agriculture and forestry are the most relevant sectors for poverty alleviation, as they represent the main sources of income in the wide rural and mountain communities of the country. Albania is a country with great potential thanks to its rich biodiversity and valuable landscape (Koci, 2014).

Relations with the European Union

Albania has maintained a progressively deepening relationship with the European Union (EU) over the years. In June 2006, a significant milestone was achieved when the Stabilization and Association Agreement was signed, officially coming into force in April 2009. This agreement supplanted the Interim Agreement on trade and trade-related matters, which had been in effect since December 2006 (Delegation of the European Union in Albania, 2023).

Albania formally applied for EU membership in April 2009 and was granted the status of an EU candidate in June 2014, marking its commitment to align with EU standards and values. In April 2018, the European Commission issued a recommendation to initiate accession negotiations with Albania.

The momentum continued to build, with the Council endorsing this recommendation in June 2018, setting the stage for the opening of accession negotiations in June 2019. It is worth emphasizing that, throughout this journey, the EU has emphasized the paramount importance of Albania's progress in key areas such as judicial reform, anti-corruption measures, and the fight against organized crime. A significant development occurred on March 24, 2020, when ministers for European affairs provided their political consent to commence accession negotiations with both Albania and North Macedonia. This decision was subsequently formalized through a written procedure and received the endorsement of the European Council.

As Albania stands as a candidate country on its path towards EU membership, it continues to derive substantial benefits from the EU's Instrument for Pre-Accession Assistance (IPA). This assistance facilitates comprehensive reforms and strategic investments, enabling Albania to align more closely with EU standards and practices.



Furthermore, Albania enjoys active participation in various EU programs, cementing its commitment to integration and cooperation with the European Union. In July 2022, a significant milestone was reached when the EU and Albania held their first intergovernmental conference, further solidifying their evolving partnership. This ongoing journey underscores Albania's dedication to aligning with the EU's values, regulations, and principles, with a shared vision of a prosperous and integrated future.

General information on forest fund

According to the Albanian National Forest Inventory (ANFI) 2018, 45,6% of Albania, i.e., an area of approx. 1.31 million ha is covered with forests. Forests (46,5%) and pastures, in total, cover c.a. 65% of the country area, or c.a. 0.65 ha/capita. Forests and wooded land in the EU achieve 0.36 ha/capita. Publicly owned forest land in Albania is predominant, with a minor share of private forests, which according to INSTAT (2014) has been stable at 28.780 ha (3%). In Albania, publicly owned forests predominate, making up the majority of forested land. Private forests remain relatively stable at 3% of the total forested area, as of 2014 (Institute of Statistics, Tirana). Municipalities manage 77% of publicly owned forests, with the National Agency for Protected Areas overseeing forests within protected zones, which constitute 20% of these forests.

Forest composition in Albania is divided into coppice (32%) and high forests (23%). While high forests cover one-third of the forested area, they contain an impressive 73% of the standing timber volume, a key consideration for national forest planning (SWG, 2023).

Beech forests cover 15% of the total forest area and hold about 40% of the standing timber volume (around 23 million m³). Coniferous forests, comprising 14% of forested land, contain roughly 24% of the standing timber volume (around 15 million m³), primarily Black Pine and Silver Fir. Albania's forests historically undergo natural regeneration due to limited financial resources, accounting for 85% of the harvested forest area. This ownership composition shapes forest management and conservation strategies in Albania. According to ANFI 2018, the total forest biomass amounts to nearly 40 million tonnes and the carbon stocking in biomass amounted to 19 million t C eq (SWG, 2023).



Organization of the state forestry sector

Until 1990, all forests and pastures in Albania were state-owned. Post the 1990 political, economic, and social upheavals, ownership diversified into state, communal, and private categories. The transition to democracy and a market economy led to significant degradation of pastures and forests. Human pressure, uncontrolled logging, overgrazing, and agricultural practices contributed to forest degradation. Weak law enforcement resulted in increased exploitation of firewood resources (SWG, 2023).

In 2016, a forestry sector reform reduced ownership to public and private categories. Publicly owned forests, 80% managed by municipalities, exclude those in protected areas, overseen by the National Agency for Protected Areas. Broadleaf forests (83%) dominate over conifers (16%), scattered across the country. Recent developments since 2008 involve decentralization, and transferring forest management to local governments, supported by international donor projects (GEF, World Bank, SIDA).

Albania lacks public forest companies; municipalities manage their resources. Private companies, under contract or concession, execute activities within forest areas. The Forest Directorate under the Ministry of Environment shapes policies, while the National Agency for Protected Areas manages protected areas. Law enforcement concerning forest activities falls under the State Environment and Forest Inspectorate.

The Ministry of Tourism and Environment (MTE) is the primary policymaking and regulatory body responsible for ensuring sustainable development in the sector. It coordinates partnerships across various sectors, balancing their interests. Within the MTE, the Forest and Pasture Sector, operating under the Directorate of Environment Development Programs, handles the following tasks: policy direction, program and document oversight, legal framework, financial planning, breeding plans and expert certification.

The National Forestry Agency (NFA) operates as a legal, public, budgetary entity under the Ministry of Tourism and Environment (MTE).



Its mission is to govern, preserve, and develop forests at the national level, promoting sustainable and multifunctional use of national forest resources, recognized as a vital national asset. The NFA has the following responsibilities: performance assessment, resource management, norms and standards, certification, coordination, ALFIS (Albanian Forest Information System), compliance oversight and control and Inspection.

In summary, the MTE oversees policy and strategic planning, while the NFA focuses on implementation, management, and compliance within the forestry sector, both contributing to the sustainable development and preservation of Albania's valuable forest resources.

The Municipality, responsible for forest governance at the local level, is a specialized entity with managerial, regulatory, technical, and advisory functions. It administers the national forest fund, both in terms of ownership and the issuance, suspension, or revocation of permits for activities within the fund. The municipality's specialized forest management structure plays a pivotal role in the governance, preservation, and sustainable use of the national forest fund within its jurisdiction, while also ensuring compliance with relevant laws and regulations.

Review of the National Legislative Framework

"On the policies of the forest sector in Albania - 2030" is the primary forest sector policy and strategic document, approved by the Albanian Government in December 2018, underscores the critical importance of forests and outlines the government's commitment to addressing the challenges facing this sector. The document's logical structure encompasses an analysis of the existing situation, the philosophy of sector governance, long-term goals, main policy directions, implementation measures, priorities, feasibility, and an implementation and monitoring plan. The overarching aim of this policy is to achieve a sustainable contribution of forests to society, both in the present and for future generations. The sector's mission is to restore balance within forest ecosystems, and its vision is to create an all-green shelter, a sustainable resource, a living organism, and an invaluable capital.



An important milestone in forest policy improvement was the passing of a new national Forest Law in 2020 after many years of work and this law is having a profound effect on farmers, women and all forest users, decentralising decision-making powers over forest rights to local municipalities. Crucially, the law allows the legal use of forests by communities, permitting them to sell non-timber forest products (Land Coalition, 2023).

Four priority issues are identified in the document: clear and comprehensive regulation of actors' rights and obligations; functional reorganization of the sector, extending from the ministry to local communities, balancing the use of forests for energy and industry and protection of forests from fire, illegal logging, and natural pests.

These priority issues span various aspects of forest governance, from forest management and service to organizational structure, financial and legal administration, and sector development. To achieve the strategic goals set for 2030, the document formulates 12 policy statements, with three for each strategic goal, providing a clear course of action. Each of these policy directions includes specific measures, totalling 40, to address Albania's current situation and economic reality.

The Forest Law is instrumental in protecting forests as assets of special importance for their contributions to climate protection, soil preservation, biodiversity, and national and international interests. It aims to promote sustainable development in the forest sector while ensuring the continuity of forest life cycles. Furthermore, the Law "For the declaration of the moratorium in the forests in the Republic of Albania" introduces a ten-year moratorium on commercial harvesting activities in public and private forest areas, promoting the improvement and restoration of degraded forest conditions. Local self-government, as regulated by the Law "For local self-government," designates municipalities as responsible for forest and pasture administration within the existing legal framework.

In preparation for implementing the EUTR/EUDR regulations, it is crucial to determine the responsible institutions and enhance human and infrastructural capacities. This preparation will help reduce illegal activities harming forests and impeding the implementation of sustainable forest management practices.



To respond effectively to EUTR requirements in the Albanian forest and wood-processing sector, potential options include certification of all forest areas, irrespective of ownership, with a focus on developing national forest certification standards and establishment of a national due diligence system aligned with EU standards.

Socio-economic aspects

The number of employees in the public forestry sector has been decreasing continuously compared to the number of employees in the early 2000s. The support of the forestry sector to the economy is therefore very limited. The contribution of the forestry sector to the GDP cannot be calculated since it is aggregated with the contribution of the agriculture sector.

The decentralization reform in forests has increased the potential of employment in this sector, especially near the forest administrations of the country's municipalities. Regardless of the legal obligation, the vast majority of municipalities have not respected this obligation regarding the number of forest specialists. Today, only 30% of the employees in the forestry administrations of the municipalities have a higher education in forestry. Based on Article 13/3 of the Law No. 57/2020 dated 30. 04. 2020 "On the forests", the income generated from all possible activities in the forest fund should be used to the extent of 100% for investments in the forest/pasture fund owned by the municipality.

In most municipalities, the entities overseeing the forests lack information and cannot provide details on how the funds collected from income have been utilized during the nearly 8 years of municipal ownership and administration of forests and pastures. It should be emphasized that these structures have no role in the process of approving the use of these revenues from the municipality. In some cases, the income generated from forestry by the municipalities was spent on the item "Salary from the income" for various employees that they recruited in the structure responsible for forests.

Any illegal activities carried out within national parks, including minor illegal cutting, are regarded as criminal offenses according to the law. This creates difficulties for people living inside protected areas, who usually obtain



firewood for household use through illegal cutting, having no alternative. Although private forest areas are very small, they have been intensively exploited in recent years. Owners are trying to make as much profit as possible, without thinking about the future of their forests. On the other hand, there are no subsidies available to encourage responsible management; there is no clear legislation on the management of private forests; and there is no manual on the technical aspects of private forest management.

There are currently no investments in private forests, while illegal exploitation by the owners and illegal logging by others are among the biggest concerns in these forests. In some areas ownership is not clear: the completion of ownership documentation is complicated by bureaucracy and corruption, and there are many cases of conflict and disputed ownership. Forest management is typically ad hoc, leading to the degradation of private forests, low incomes, and frequent forest fires. Illegal and/or unregulated logging is continuing despite government efforts to control them.

Conclusion

The National Forestry Agency serves as a crucial link, connecting municipalities with the central government to facilitate SFM implementation. Reforestation, a legal obligation, sees limited fulfilment, with only 20% of forest economies having management plans. Some municipalities lack sufficient funds, requiring support from the Albanian government. ANFI 2018 data highlights that Albania's forests, regardless of the silvicultural system, are predominantly young, posing challenges for future resource supply to the wood processing industry. Urgent silvicultural interventions, including afforestation, reforestation, clearing, thinning, and protection measures, are needed for the care and sustainability of Albania's forests.

Considering the organization of the forestry sector and the responsibilities of relevant institutions in Albania, EUSTAFOR should establish contact with the National Forest Agency. In line with the EU accession process and the importance of European integration, the potential inclusion of the relevant institution in the EUSTAFOR network can only contribute to the further development of the forestry sector and enhance the management of state forests.



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Legislation framework:

The Albanian Constitution, in Chapter V/Social Objectives, Article 59/dh, prescribes the principle of sustainable governance for the use of natural resources, including forest resources, namely: “rational use of forests, waters, pastures and other natural resources based on the principle of sustainable development”.

Law No. 9587, date 20.07.2006, “On biodiversity protection” (amended)

Law No. 10006, date 23.10.2008 “On the protection of wild fauna” (amended)

Law No. 9867, date 31.01.2008 “On regulations and procedures for international trade of endangered wild flora and fauna”

Law No. 10120, date 23.04.2009 “On the protection of natural medicinal and oil-etheric plants” (amended) Law No.10253, date 11.03.2010 “On hunting”

Law No. 10431, date 09.06.2011 “On the environment protection” (amended). This law aims: “to protect the environment at a high level, preserve and improve it, prevent and reduce risks to human life and health, ensure and improve the quality of life, for the benefit of present and future generations, as well as ensuring the conditions for sustainable development of the country”.

Law No. 13/2015, “For local self-government”. This law regulates the organization and functioning of local government units in the Republic of Albania and defines the functions, competencies, rights, and duties of the relevant bodies. In Chapter VII, Article 27 states that municipalities are responsible for the administration of forests and pastures, respecting the existing legal framework for forests.

Law No. 5/2016, February 4, 2016 “For the declaration of the moratorium in the forests in the RoA. The purpose of this law is to reduce interventions on the forest fund, which is reduced because of overexploitation and other damage and aims towards improving and restoring its condition. The duration of the moratorium is 10 years from the date of the entry of the law into force.

Law No. 61/2016, date 02.06.2016 “For the declaration of the moratorium on hunting in the RoA”.

Law No. 81/2017, date 04.05.2017 “On protected areas”. More than 80% of the protected areas network includes forest areas with a protective status.

Law No. 57/2020, date 30.04.2020 “On Forests”. The purpose of this law is the protection of forests as assets of special importance, for their great and irreplaceable values in the protection of the climate, the soil, the preservation and improvement of the productive potentials and balances of the natural environment, biodiversity, genetic resources, and the water regime, as obligations of national and international interest.



ABBREVIATIONS

UNESCO - United Nations Educational, Scientific and Cultural Organization

EU - European Union

FME - Forest Management Enterprise

FMP - Forest Management Plan

FAO - Food and Agriculture Organization of the United Nations

FSC - Forest Stewardship Council

PEFC - Programme for the Endorsement of Forest Certification

III. BELARUS

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Belarus is part of Eastern Europe and sits at a crossroads of major continental transit routes, including a key Eurasian corridor. It's landlocked and shares borders with Lithuania, Latvia, Russia, Ukraine, and Poland, covering roughly one-third of the land area of Ukraine. Belarus comprises six regions: Brest, Vitebsk, Gomel, Grodno, Minsk, and Mogilev. They are further divided into 118 districts. Minsk, the capital, is an independent city. Belarus boasts a diverse natural landscape, primarily composed of mixed deciduous and coniferous forests. In the northern regions, conifers like pine and spruce dominate, while further south, deciduous trees such as oak and hornbeam become more prevalent. Birch trees are a common sight throughout the country, often regenerating on burned or disturbed lands.

Centuries of forest clearance for agriculture have significantly reduced the original forest cover, especially the deciduous trees that thrive in richer soils. However, on Belarus' western border with Poland, the Belovezhskaya Forest stands as one of Europe's largest remaining primeval mixed forests, covering over 1,200 km². This portion of Belarus was designated a UNESCO World Heritage site in 1992.

The forest features towering trees, including European bison (wisent), which had gone extinct in the wild after World War I but was successfully reintroduced through captive breeding.



Other wildlife inhabitants include elk, deer, boars, small game, hares, squirrels, foxes, badgers, martens, and beavers along the rivers. Bird species encompass grouse, partridge, woodcocks, snipes, and ducks, while the rivers teem with fish.

Relations with the European Union

The EU has been actively enhancing its engagement with Belarus, particularly in education, mobility, youth programs, and fostering people-to-people connections. Previously, the European Union was Belarus' second-largest trading partner, accounting for nearly a fifth of its total trade. In 2020, bilateral trade in goods between the EU and Belarus reached 12.9 billion euros. Belarus primarily exported mineral fuels, wood, and base metals to the EU, while the EU exported machinery, transport equipment, and chemicals to Belarus. The country has been a strong participant in the Horizon 2020 research and innovation program within the Eastern Partnership. Until 2020, the EU was the largest grant donor in Belarus, providing substantial financial assistance, averaging around 30 million euros annually from 2016 to 2020 (Delegation of the European Union to the Republic of Belarus, 2021).

In March 2022 the EU Council published Decision (CFSP) 2022/356 and Council Regulation (EU) 2022/355. According to these, it is prohibited to import, directly or indirectly, wood products into the Union if they originate in Belarus; or have been exported from Belarus; purchase (directly or indirectly) wood products which are located in, or which originated in Belarus; transport wood products if they originated in Belarus or are being exported from Belarus to any other country; to provide, directly or indirectly, technical assistance, brokering services, financing or financial assistance, including financial derivatives, as well as insurance and re-insurance, related to the prohibitions on imports, purchase or transport as described above (Preferred by Nature, 2022).

General information on forest fund

Forests hold a paramount position in the Republic of Belarus, serving as a vital renewable natural resource and a cornerstone of the nation's wealth.



These woodlands and forest resources play a pivotal role in fostering sustainable social and economic development, contributing significantly to the country's economic, energy, ecological, and food security. In the last 30 years, key quantitative and qualitative indicators of the country's forests have shown significant progress: forested area now has 8.280,3 thousand ha and the forest cover of the Republic has reached 39.9%, the total standing timber volume is 1.831.8 million m³. This includes 300.9 million m³ in mature and over-mature stands, constituting 375.4 million m³. The standing timber stock per hectare of forested land is 221 m³/ha, the stock in mature and over-mature stands reaches 272 m³/ha and the average age of forest stands is 56 years, reflecting a more mature and sustainable forest ecosystem (Ministry of the Forestry of the Republic of Belarus, 2023).

Birch trees are widespread across the country, especially in areas recovering from fires or disturbances. Centuries of forest clearance for agricultural purposes have significantly reduced the extent of the original primaeval forest, particularly the deciduous tree population, which thrives in richer soils.

In contrast to many European countries, all the forests from the Republic of Belarus are the exclusive property of the state, which determines the order of forest management and timber production. In the structure of the state forest management, there are 7 forest owners (Golyakevich, 2021).

Review of the National Legislative Framework

The Ministry of Forestry oversees the implementation of state policies in forest management, encompassing climate change adaptation. The legal foundation, derived from the Constitution of the Republic of Belarus, comprises the Forest Code and presidential acts. The State Program "Belarusian Forest" (2016-2020) addresses tasks outlined by the President and Government, emphasizing efficiency in forest-related sectors. It aims to integrate modern technologies, drawing inspiration from advanced forestry sectors like Finland. Simultaneously, the Strategic Plan (2015-2030) focuses on conserving biodiversity, enhancing forests' role in biosphere preservation, and bolstering resilience to climate change.



Both plans prioritize updating national forest policies, fortifying the forest sector's economic appeal (I. V. Voitau, 2019).

Belarus' Constitution determines that all forests are owned entirely by the state. The Ministry of Forestry of the Republic of Belarus is the primary designated government agency responsible for forest utilisation, reproduction, conservation and protection. Forestry measures are based on the forest management plan. Logging operations are done based on the requirements of the forest management plan and issued logging licences (Forest Code, Chapter 36, 38, 39). Logging licences are issued by the Forest Management Enterprise (FME) (Ministry of Forestry, also FMEs of Ministry of Defence, Executive Office of the President of the Republic of Belarus, Ministry of Education, National Academy of Sciences), in which way companies (or FME) are permitted to fell trees on the FME's property. Logging licence issuance is based on the Forest Management Plan and forest inventory (survey) data.

Forestry measures are based on the data in the Forest Management Plan (FMP). The FMP is prepared for 10 years based on field forest inventories by the State Forest Inventory Institution "Belgosles". The FMP provides detailed forest stand characteristics and other legally required information and procedures. Harvesting restrictions are identified in the management plan and maps. Forest management without approved FMP is forbidden (FSC, 2017).

The State Program "Belarusian Forest" for 2021-2025 emphasizes the importance of forest reproduction to achieve sustainable forest management, combining artificial and natural reforestation efforts. The program's scope includes: increasing forest cover to 40.3% of the national territory, raising timber harvest volume to 3.2 m³/ha, enhancing forest road infrastructure, managing wildlife populations for ecological balance, expanding paper, cardboard, and pulp production, and boosting furniture production. Implementation of the State Program involves activities like automation of forest management processes, digitalization of forestry information, optimisation of forest nurseries, promotion of mixed forest crops, and enhancement of firefighting equipment. These efforts aim to achieve sustainable forest development and economic growth while preserving Belarusian forests for future generations (FAO, 2021).



The Republic of Belarus is not involved in any bilateral and multilateral initiatives in the field of illegal logging and trade of illegally sourced forest products. The Republic of Belarus has official policies related to the reduction of volumes and elimination of illegal logging. In particular, agitation and public activities are organized. For violation in the forest criminal, administrative and material responsibilities are foreseen. Any trade of forest products, which are not supported by the documents confirming their origin, is illegal.

Organization of the State Forestry Sector

All of Belarus' forests are under the exclusive ownership of the state, with management responsibilities assigned to various state organizations. From a total of 9.620.900 ha of forest area, the Ministry of Forestry is managing 8.461.300 ha or almost 88% of the total forest area, including 98 legal entities charged for forest management. Other state organizations charged with forest management are the Administrative Department of the President of the Republic of Belarus (8%), the Ministry of Emergency Situations (2,3%), the Ministry of Defence (0,9%), the National Academy of Science of Belarus (0,4%), Ministry of Education (0,3%), Local executive and administrative bodies (0,2%) (Ministry of the Forestry of the Republic of Belarus, 2023).

During the first half of 2020, enterprises of the Ministry of Forestry of the Republic of Belarus harvested 10.757 million m³ of wood. For instance, 3.445 million m³ were harvested by their harvesters and 1.8 million m³ by harvesters of external organizations providing logging services. The share of mechanized timber harvesting operations was 48.8%, while, on the other hand, 57.8% of forwarders have more than 5 years of operation.. This can be explained by the fact that the use of forwarders in timber harvesting operations began earlier than that of harvesters (Golyakevich, 2021).

Each forestry enterprise and national park in Belarus is mandated to adhere to the current forest management plan. Land tenure and management rights are determined and regulated by the official document known as the "Charter of a Forestry Enterprise". Belarus' forestry operates under exclusive state ownership, with centralized forest management and wood utilisation.



Embracing the principles of sustainable forest management, these enterprises not only ensure the continuous utilisation of forests within annual wood growth limits but also play a pivotal role in bolstering the state's economic security and maintaining national economic stability. The economic foundation of forest management lies in wood utilisation, reflecting its level of intensity.

This involves various types of utilization, primarily focused on wood harvesting. Wood harvesting occurs during major timber operations as well as intermediate activities, including forest care, selective sanitary cutting, and reconstruction. Additionally, it encompasses activities such as forest renewal, plantation restructuring, sanitation cutting, land clearance, and preparation for infrastructure projects like pipelines, roads, power lines, and communication networks.

Based on the EU-Belarus sanction regime, the Forest Stewardship Council (FSC) has issued a series of updates to its normative framework to implement measures related to FSC certificates and to disable the sourcing of controlled material from these countries, in this moment all valid FSC certificates are terminated (FSC, 2022). Under the Programme for the Endorsement of Forest Certification (PEFC) scheme in the moment of study development (November 2023), only the Republican Association of Forest Certification Systems holds a valid PEFC licence (PEFC, 2023).

Socio-economic aspects

According to the August 2023 performance report of the Belarusian forestry industry, there was a significant change in lumber exports. Before the imposition of EU sanctions, the monthly lumber export was 60,000 m³. Following a decrease in exports due to the sanctions, there has been a rebound, and the lumber export has now reached an all-time high of 77,000 m³. Before the sanctions, the European Union countries were the primary markets for Belarusian lumber, constituting 56% of the country's lumber exports. However, after the suspension of lumber exports to the EU, the main consumers shifted. China became the leading buyer, accounting for 52% (previously 37%), followed by Azerbaijan at 24% (previously 4%), and Russia at 6%.



In the first seven months of 2023, Belarus managed to ship products worth \$90.4 million, reflecting the resilience and adaptation of the forestry industry to the changing market conditions (Press Service of the President of the Republic of Belarus, 2023).

The forestry sector encompasses logging, woodworking, pulp and paper, and wood chemistry. Over 1,200 Belarusian enterprises manufacture and export furniture to over 70 countries. Regarding cellulose production, Belarus manufactured 1,600 tonnes in 2017, and the output surged to 290,000 tonnes in 2021, with plans to further increase to 370,000 tonnes annually. The realization of this goal hinges on the Svetlogorsk bleached pulp plant reaching its full operational capacity, marking the first of its kind in the former Soviet region (Official website of Belarus, 2023).

Conclusion

Belarus' forestry sector operates under exclusive state ownership and is centrally managed by various state organizations, primarily the Ministry of Forestry. The state plays a dominant role in forest management and wood utilization, and the sector adheres to principles of sustainable forest management. While the specific details of Belarus' forest management system align with the centralized state ownership model, the interest in joining EUSTAFOR would depend on Belarus' strategic objectives, its willingness to align with European principles and standards, and its interest in participating in collaborative efforts within the European state forestry community.



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 National strategy of sustainable development of the Republic of Belarus
 Forest Code of the Republic of Belarus

IV. BOSNIA AND HERZEGOVINA



ABBREVIATIONS

BIH - Bosnia and Herzegovina

EU - European Union

FAO - Food and Agriculture Organization

FBIH - Federation of Bosnia and Herzegovina

FP - Forestry Program

MOFTER - Ministry of Foreign Trade and Economic Relations

NFI - National Forest Inventory

NWFP - Non-Wood Forest Products

RS - Republic of Srpska

SAA - Stabilization and Association Agreement

SWG - Regional Rural Development Standing Working Group in South Eastern Europe

IV. BOSNIA AND HERZEGOVINA

Bosnia and Herzegovina is located in the western Balkan Peninsula of Europe and divided into two historical regions: Bosnia in the north and central areas, and Herzegovina in the south and southwest. The internationally brokered Dayton Accords of 1995 led to the creation of two autonomous political entities: the Republika Srpska in the north and east, and the Federation of Bosnia and Herzegovina covering the western and central regions, along with District Brcko.

Bosnia and Herzegovina is a country with the highest percentage of forest and the greatest diversity of forest species in the Western Balkans. Due to its natural and diverse structure, as well as significant natural regeneration, forests represent a crucial resource for further economic and societal development. Forests and forest land in Bosnia and Herzegovina cover an area of 3.231.500 hectares, including 1.652.400 hectares of high forests and 1.252.200 hectares of coppice forests. The remaining part includes shrubs, barren land, and other forest land. These data indicate that approximately 63% of the territory of Bosnia and Herzegovina is covered by forests and forest land, with values among the highest in Europe; of which about 20% of the forests are privately owned, and



80% are state-owned. Ownership and management of forest resources fall under the jurisdiction of entities: Republika Srpska and the Federation of Bosnia and Herzegovina, which has delegated management authority to cantonal governments and the Brčko District of BiH (MOFTER, 2018).

Relations with the European Union

The Stabilization and Association Agreement (SAA) between Bosnia and Herzegovina and the EU, signed on 16 June 2008 in Luxembourg, also includes an Interim Agreement that governs trade and trade related affairs from 1 July 2008. The SAA officially came into effect on 1 June 2015. Bosnia and Herzegovina applied for EU membership on 15 February 2016. The Council responded by adopting conclusions on the application on 20 September 2016, urging the Commission to provide its opinion. Additionally, the Council encouraged Bosnia and Herzegovina to persist in its endeavours to achieve the effective implementation of the reform agenda, particularly in the realms of rule of law and public administration (Delegation of the European Union to Bosnia and Herzegovina & European Union Special Representative in Bosnia and Herzegovina, 2021).

In May 2019, the Commission provided its opinion on Bosnia and Herzegovina's EU membership application, outlining 14 key priorities. In December 2019, the Council adopted conclusions based on this opinion. In December 2022, Bosnia and Herzegovina gained EU candidate status, contingent upon fulfilling measures to strengthen the rule of law, combat corruption and organized crime, manage migration, and uphold fundamental rights, as outlined in the Commission's October 2022 communication on enlargement policy.

The EU is the country's top trading partner, with the majority of imports (60.6%) and exports (72.3%) involving EU countries in 2020. Additionally, a significant portion of foreign direct investment in Bosnia and Herzegovina originates from the EU. The EU provides substantial financial assistance, and Bosnia and Herzegovina has expanded its participation in EU programs, co-financed through IPA funds. However, robust sector strategies are essential for the country's preparation and eligibility for funding within the IPA III strategic framework.



General information on forest fund

Bosnia and Herzegovina's forest vegetation boasts remarkable diversity in plant communities and floristic composition. This diversity results from historical development, specific ecological conditions, and human influences. The country's advantageous geographic location exposes it to a range of climatic influences, from coastal Mediterranean forests to mountainous forests in central Bosnia and Herzegovina. With over a hundred tree species, including fir, spruce, Scots and black pine, beech, various oak species, and a smaller number of noble deciduous trees like maple, elm, ash, and fruit trees (cherry, apple, pear), the forests here are exceptionally rich. One of Bosnia and Herzegovina's strengths lies in its mountainous regions, where forest ecosystems have been relatively well-preserved, showcasing their natural state. Additionally, the country is home to rainforest-type stands, some of which are protected as per IUCN categorization. Among these protected areas is Perućica, the largest and most diverse rainforest reserve in the region (MOFTER, 2018).

According to the most recent official National Forest Inventory (NFI), forests and forest land cover approximately 3.2 million ha, accounting for approximately 63% of Bosnia and Herzegovina's total land area.

In Bosnia and Herzegovina (BiH), wood and timber are the primary products derived from forest management. Outdated inventory data have led to an underestimation of forest area, growing stock, and carbon stock. Data from the second National Forest Inventory (NFI) indicate a total growing stock of 435 million m³ in BiH, with an annual harvest of 5.7 million m³ over 10 years.

In the Federation of Bosnia and Herzegovina (FBiH), state-owned forests cover 82% of the area, totalling 1.233.807.5 ha, with about 277.130 hectares in private or other ownership. State forests in the FBiH have a total wood stock of 180.016.229 m³, and the annual volume increment is 4.294.396 m³. Conifers account for 44%, while deciduous trees make up 56%. The allowable cut is 3.048.491 m³, with 46% from conifers and 54% from deciduous trees.

In the Republic of Srpska, as of 2021, forests and forest land cover approximately 1.31 million ha, constituting about 53% of the region's total area. 77% of the total area of forests and forest land is state owned, while about 23% is



privately owned. The total area of forest-covered land is 1.06 million ha, of which 0.76 million ha (or about 72%) is owned by the Republic of Srpska, and about 0.33 million ha (or about 28%) is privately owned. It is important to note that the actual forest cover is likely higher, especially considering private forests that may not be inventoried if they are not classified as "forest" in cadastral land records. In recent years, neglected agricultural lands have undergone afforestation due to a decrease in rural populations and reduced agricultural activities. High forests with natural regeneration have an average volume of 324 m³/ha, while coppice forests have an average volume of 128 m³/ha. Coniferous trees make up 34% of the total volume, with deciduous trees accounting for the remaining 66%. Among tree species, beech is the most prominent, representing 40% of the total volume, followed by fir (15%), spruce (14%), and oak (10%). The annual increment in the Republic of Srpska's forests is approximately 6.5 million m³, with state forests contributing 79% (about 5.1 million m³) and private forests contributing 21% (about 1.4 million m³).

2.76% of the territory of the Republic of Srpska, i.e., approximately 68.000 ha, is currently under different protection regimes (The RS Institute for the Protection of Cultural, Historical and Natural Heritage, 2022).

Review of the National Legislative Framework

Forestry matters at the national level are primarily handled by the Ministry of Foreign Trade and Economic Relations (MOFTER), particularly concerning external institutions and international relations. Forestry matters at the national level are primarily handled by the Ministry of Foreign Trade and Economic Relations, particularly concerning external institutions and international relations.

Federation of Bosnia and Herzegovina

In 2009, the Federal Ministry of Agriculture, Water Management, and Forestry in Bosnia and Herzegovina began drafting the Forest Program (FP) to align with EU policies.



The FP aims to establish forestry and game management policies in the Federation of Bosnia and Herzegovina (FBiH) for sustainable forest management and biodiversity. The general part of the FP was accepted by the FBiH Government in 2017, but its adoption by the FBiH Parliament is pending the Law on Forests.

The legal framework is complicated, with the 2002 Law on Forests becoming obsolete in 2009. A temporary solution, the Regulation on Forests, was in effect until 2011. Since then, with no new law, the FBiH forest sector lacks legal regulation. The FBiH Government sent a Draft Law on Forests to Parliament in 2017, but it has not been adopted. Consequently, nine cantons established their forestry regulations, creating uncertainties in forest management. The dilemma now is whether to update the existing FP or create a new one, considering the lack of federal regulation for over 12 years (Maric, 2021).

Bosnia and Herzegovina's forest management faces challenges due to a complex regulatory system. The forest sector operates at the entity level, and the Law on Forests became obsolete in 2009. A temporary solution, the Regulation on Forests, was in effect until 2011. However, as of that date, with no new law in place, the forest sector in the Federation of Bosnia and Herzegovina (FBiH) lacks legal regulation.

In 2017, the FBiH Government sent a Draft Law on Forests to Parliament, but it hasn't been discussed yet. As a result, nine cantons enacted their regulations, conflicting with constitutional provisions and causing inconsistencies in forest management, ownership, and financial allocation (SWG, 2023).

Republic of Srpska

Forest management in the Republic of Srpska is governed by the Law on Forests, enacted in 2008 and amended in 2013 and 2020. This law establishes the Forestry Development Strategy as the basis for the Forestry Program, aimed at ensuring the sustainable development and management of forests across ownership types. The initial Forestry Development Strategy (2011-2021) emphasized economic and rural development, employment, environmental protection, and the enhancement of ecological, economic, and social functions of forests. Although the Forestry Program, mandated by the 2008 law, has not



been formulated, the Republic has outlined a comprehensive, participatory, and inter-sectoral approach for sustainable forest management over twenty years. The upcoming Forestry Development Strategy for 2022-2032, currently in the final stage of development, aligns with the goal of Sustainable Forest Management (SFM). SFM emphasizes using forests and forest land in a manner that preserves biodiversity and meets environmental, economic, and social needs without harming other ecosystems (Ministry of Agriculture, Forestry and Water Management, 2022).

Organization of the state forestry sector

Ownership of forests in the country is divided among the Federation of BiH, the Republika Srpska, and the Brčko District. Each of these entities manages forests within their respective regions through their respective forestry ministries. Specifically, the Federal Ministry of Agriculture, Water Management, and Forestry oversees forestry development planning. Additionally, at the cantonal level, individual Cantonal Forestry Administrations are responsible for planning and administratively supervising the management of both state-owned and privately owned forests.

In the Federation of Bosnia and Herzegovina (FBiH), the Ministry of Agriculture, Water Management, and Forestry oversees forestry matters through its Forestry Department, which consists of two key units:

- Forest Sector for Forestry and Hunting Department - focuses on the legal aspects of forestry and hunting laws and related legislation within FBiH. It plays a crucial role in permitting processes, such as land use changes and forest management planning.
- FBiH Forest Office: Responsible for forest silviculture and protection, this unit manages issues related to forest users, subsidies, and support payments for forestry. It also takes charge of developing and monitoring forestry processes and plays a vital role in overall monitoring activities within the forest sector.



In the Federation of Bosnia and Herzegovina (FBiH), the Forestry Department under the Ministry of Agriculture, Water Management, and Forestry has two units. The Forestry and Hunting Department handles legal aspects of forest law, including permission awards for land use and forest management planning. The FBiH Forest Office oversees silviculture, protection, forest users, and subsidies, and monitors forestry processes. The FBiH Forest Inspection ensures the implementation of forest laws. At the Cantonal level, responsibilities lie with the Ministry of Agriculture, Water Management, and Forestry, except in Sarajevo, Zapadno-Hercegovački, and Bosansko-Podrinjski Cantons. Key bodies include the Cantonal Forest Office and the Cantonal Forest Inspection.

According to the Law on Forests in the Federation of Bosnia and Herzegovina, the federal minister has delegated forest management and administration responsibilities to the cantonal ministers responsible for forestry. At the cantonal level, the Ministry of Agriculture, Water Management, and Forestry assumes these responsibilities, except in the Sarajevo Canton, Zapadno-Hercegovački Canton, and Bosansko-Podrinjski Canton. In these specific cantons, key bodies include the Cantonal Forest Office and the Cantonal Forest Inspection. To ensure compliance with forest-related laws within FBiH, the FBiH Forest Inspection conducts comprehensive inspections, overseeing the implementation of all actions outlined in FBiH's forest legislation.

By the Law on Forests of the Republic of Srpska, the Ministry of Agriculture, Forestry, and Water Management is responsible for managing forests and forest land owned by the RS. The Ministry established the Council for Forestry, composed of nine members, to advise on crucial matters within the forestry sector. This council includes representatives from the Ministry, other state bodies, institutions, and organizations related to forestry, as well as local communities, non-governmental organizations, forest owners, and other relevant entities.

The Ministry oversees and assesses the operations carried out by the Public Forestry Enterprise, conducting an annual analysis of activities. This includes evaluating performance and suggesting measures for the continued utilization of state forests and forest land, along with fulfilling maintenance obligations. The PFE "Forests of the Republika Srpska" JSC (users of forests and forest land owned by the Republika Srpska), established by the Government of the Republic of Srpska, is responsible for certain forestry activities related



to state forests and forest land, including silvicultural and protection activities. These activities are outlined in a specific contract signed with the Ministry. The Public Forestry Enterprise performs its functions through various organizational units as users of the Republic of Srpska's forests and forest land.

The Inspectorate of the Republic of Srpska operates as an independent administrative body for the Republika Srpska, handling tasks of general significance. It plays a crucial role in fostering social discipline by conducting inspections, administrative duties, and other responsibilities to enforce laws and regulations. The Government of the Republic of Srpska oversees the Inspectorate's activities, and the Inspectorate, in turn, provides an annual report to the Government. Comprising thirteen republic inspectorates, including one dedicated to forestry inspection, the Inspectorate of the Republika Srpska is responsible for overseeing compliance with regulations in various areas such as forests, forestry, hunting, national parks, and the reproductive material of forest trees and shrubs. Additionally, it addresses administrative matters as stipulated by specific regulations (Inspectorate of the Republika Srpska, 2022).

Socio-economic aspects

The contribution of forestry and related sectors to the GDP of Bosnia and Herzegovina was 0.86% in 2010 (FAO, 2015), while in 2019, the contribution of the sectors of Agriculture, Forestry and Fishing was 6.1% (Kapovic Solomun, 2022).

In 2012, the forest sector (forestry without wood-processing industry) of FBiH employed 4 393 people (data for Canton 7 - Hercegovačko-Neretvanski Canton, are not included). 53% (2 330) were forestry professionals with different education/ qualification levels. According to official statistics 4 285 people were employed in the forest sector of Republika Srpska in 2012. The total number of people employed in the forest sector (public forest management companies and public forest administration) of both BiH entities is 8.678. This number does not include people employed by private companies engaged in the forest sector as contractors, forestry inspectors at different administrative levels or forestry professionals employed in education and research (FAO, 2015).



According to data from 2015, there were a total of 4,627 employees in forestry companies in FBiH, of which 4,126 (89.2%) were employed in forestry companies (enterprises), and 501 (10.8%) in cantonal or federal forestry administrations (FEM4FOREST, 2022).

According to the official data of the Institute of Statistics of the Republic of Srpska (2022), at the end of 2021, 4727 workers were employed in the forestry sector, out of which 1613 were engaged in planting and growing forests, 1847 were employed in forest exploitation and 1267 in other activities. Of the total number of employees, 653 or about 14% were forestry engineers, 1236 or about 26% were professional workers (evocative qualified and highly qualified workers), 1685 or about 36% were forestry technicians, with the remaining 1153 or about 24% of administrative staff.

Available data on illegal logging usually refer to violations that involve material removal of trees, i.e., theft and unauthorized harvesting. Another aspect of illegal activities involves corruption and nepotism in the forestry sector. Tracking the specific case of illegal logging is difficult due to the lack of consolidated data, suggesting a lack of strong enforcement. In general, Bosnia and Herzegovina lacks implementation measures aimed at combating corruption in the forest sector. So far, corruption is being tackled through internal programmes at the cantonal level in the Federation of Bosnia and Herzegovina. The measures are primarily focused on formal company commitments and the development of internal structures within companies to prevent and combat corruption and continued efforts to educate and disseminate information on the importance of tackling corruption (Radosavljevic, 2023).

Conclusion

Addressing key aspects is crucial for the future of Bosnia and Herzegovina's (BiH) forest sector. To enhance sustainable forest management in the Bosnia and Herzegovina (BiH), the following priorities should be considered: recognition and leverage the underestimated potential of BiH's rich forest resources, emphasizing the importance of accurate forest inventory data for resource planning, focus on making currently unproductive or inaccessible areas (as landmines) accessible to maximize forest resource utilization, prioritize biodiversity conservation



in forest management planning, supporting Natura 2000 implementation and exploring financing instruments for ecosystem services, streamline and harmonize cross-thematic strategies and regulations to ensure a coherent role in rural development, including fostering institutional platforms for strategic forest policy making, diversify the forest sector by supporting marketing platforms for wood products and non-wood forest products (NWFP) and providing training to enhance capacity in the forest-based sector, establish institutional structures for certification and collaboration to comply with the EU Timber Regulation and facilitate business development with the EU, identify and address investment needs, including restoring and expanding the forest road network, adopting modern harvesting technologies, and building capacity in human resources. Overcoming challenges like law enforcement, political instability, and illegal activities is crucial for attracting private investors and creating an investment-friendly environment.

State-owned forests of the Federation of Bosnia and Herzegovina are already represented within the EUSTAFOR association by ŠGD Hercegbosanske šume doo, underscoring the recognized significance of EUSTAFOR. Given the political structure of Bosnia and Herzegovina, there is indeed the potential for another enterprise from the Federation of Bosnia and Herzegovina to become a member of EUSTAFOR. Regarding future collaboration, it is strongly recommended and holds considerable significance for the Public Enterprise "Sume Republike Srpske" to consider joining EUSTAFOR, especially in light of the extensive forested areas under their stewardship and the pivotal role of the forestry sector in Republika Srpska.



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Legislation framework of FBiH:

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Law "On Forests" No. 37/04, date 10.07.2004.(amended)

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Law "On hunting" No. 4/06, date 01.02.2006

The law "On Seeds and planting material of forest and horticultural species of trees and shrubs" No. 8/10, date 24.02.2010. (amended)

Law "On hunting" No. 8/10, date 24.02.2010. (amended)

Law "On hunting" No. 81/14, date 03.10.2014. (amended)



Legislation framework of RS:

Law on Forests ("Official Gazette of RS", No. 75/08, 60/09, 70/20)

Law on Reproductive material of forest trees ("Official Gazette of RS" No. 60/09)

Law on Nature Protection ("Official Gazette of RS" No. 113/08, 20/14)

Law on Protection of the environment ("Official Gazette of RS" No. 71/12, 79/15, 70/20)

Law on Hunting ("Official Gazette of RS" No. 34/08, 60/09, 50/13)



ABBREVIATIONS

EUSTAFOR - European State Forest Association

EU - European Union

LULUCF - Land Use, Land-Use Change, and Forestry

OWL - Other woodland

UNECE - United Nations Economic Commission for Europe

MARDE - Ministry of Agriculture, Rural Development and Environment

V. CYPRUS

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Cyprus is an island in the eastern Mediterranean Sea, located approximately 65 km south of Turkey, 60 100 km west of Syria, and 770 km southeast of mainland Greece. It ranks as the third-largest Mediterranean island, following Sicily and Sardinia. The total area of the island is 9.251 km. It measures 240 km long and 100 km wide at its widest point. The physical relief of the island is dominated by two mountain ranges, the Troodos Mountains and the smaller Kyrenia Range, and the central plain they encompass, the Mesaoria. The Mesaoria plain is drained by the Pedieos River, the longest on the island. The Troodos Mountains cover most of the southern and western portions of the island and account for roughly half its area. The highest point in Cyprus is Mount Olympus at 1.952 m, located in the centre of the Troodos range. The narrow Kyrenia Range, extending along the northern coastline, occupies substantially less area, and elevations are lower, reaching a maximum of 1.024 m (MARDE, 2022).

Relations with the European Union

Cyprus joined the European Union (EU) on 1 May 2004 and became a member of the Eurozone on 1 January 2008. Despite the island's division, the entire territory of Cyprus is considered EU territory. Cyprus maintains its Permanent Representation to the EU in Brussels, led by an Ambassador.



This mission plays a crucial role in representing Cyprus in EU Council meetings and collaborating closely with other EU institutions to advocate for the country's interests and those of the EU.

The main sectors driving Cyprus's economy in 2020 were wholesale and retail trade, transport, accommodation, and food services (21.4%), followed by public administration, defence, education, healthcare, and social work activities (20.8%), and professional, scientific, and technical activities, as well as administrative and support services (11.3%). Regarding trade, approximately 34% of Cyprus's exports go to other EU member states, with Greece (9%) and the Netherlands (5%) being the top destinations. Outside the EU, 8% of exports are destined for Liberia and 9% for the United Kingdom. In terms of imports, 59% originate from EU member states, with Greece (22%) and Italy (8%) being the largest sources. Outside the EU, 8% of imports come from the United Kingdom, and 6% from China. This ongoing partnership between Cyprus and the EU underscores their economic and diplomatic ties, contributing to the island's role as an EU member state (European Union, 2022).

Continued forest fire prevention policies and better cropland and grassland management would help preserve the capacity of Cyprus' land use sector to remove carbon. Cyprus' land use, land use change and forestry (LULUCF) sector is a net carbon sink, although the volume of carbon removed has dropped significantly since 2021. For 2030, Cyprus' target for the land use sector implies net removals of 352 kt CO₂eq (European Commission, 2023).

Review of the National Legislative Framework

In 2012, Cyprus enacted a new Forest Law and Regulations, providing a legal framework for forest conservation, protection, sustainable management, and development. The Forest Law includes all those provisions that regulate the relationship of the citizen to the forest, and activities relating to the lighting of fires in state forests and at a distance of 2 km from forest outskirts. The legislation incorporates international commitments on climate change, protective forests, and protected areas. Amendments in 2016 and 2018 addressed economic challenges and regulated state forest land use.



One year later, In 2013, Cyprus adopted legislation aligning with the EU Timber Regulation to control illegal logging. The Department of Forests oversees implementation, requiring a due diligence system for timber trade participants, with penalties for non-compliance.

The Council of Ministers introduced a Forest Policy in 2013, outlining strategic priorities such as conservation, protection from fires, climate change adaptation, biodiversity preservation, and promoting forest recreation. The policy also focuses on employment, infrastructure, and alignment with international forest policies. Economic challenges interrupted the NFP process, leading to the establishment of a New Strategic Plan (NSP) for 2016-2018. The NSP, modified every three years, integrates the Department of Forests into the national development strategy, specifying vision, mission, and objectives, along with criteria for evaluation.

Forestry subsidies in Cyprus are consolidated in the EU Rural Development Regulation. The 2014-2020 Rural Development Program allocates 6.5 million euros for forest-related measures, jointly funded by the EU and the Cyprus government. Cyprus adopted a National Action Plan for Green Public Procurements, including timber products. The plan encourages the use of materials from sustainably managed forests and aims to increase certified timber product usage to 50%, ensuring legality.

The Department of Forests relies on scientific research for decision-making. Research institutions' capacity has grown, and funding, either from the national budget or international sources, supports applied research on forest resource management. Modern technologies like GPS and GIS enhance data collection, contributing to improved information accuracy (UNECE, 2020).

According to the details found on the Directorate of Forests' website, Cyprus aligns with European Union initiatives in the forestry sector.

This alignment is in strict adherence to national legislation and encompasses various topics, including but not limited to the EU Forest Strategy, the Multi-Annual Implementation Plan of the Forest Strategy, the European Green Deal, Community Actions supporting Sustainable Forest Management, Rural Development Policy, Protection of Forests, Nature Protection, Invasive Species,



Inclusion of Land Use, Land Use Change, and Forestry (LULUCF), Marketing of Forest Reproductive Material, Protective Measures, the Illegal Logging Action Plan, and the International Tropical Timber Agreement (Department of Forests, 2023).

Socio-economic aspects

The forestry sector in Cyprus has felt the impact of the economic crisis, despite its minimal investment compared to other productive sectors. The challenging external environment and tightening financial conditions have adversely affected employment and the budget of the Department of Forests. The low productivity of local forests and the reliance on imported finished wood products contribute to the limited number of people exclusively dependent on forestry in Cyprus. Rural depopulation further distances individuals from forests, prompting migration to urban centres with growing service sectors.

As a net wood importing country, Cyprus is highly vulnerable to market fluctuations, with wood imports constituting up to 98% and negligible exports. The primary commercial species, *Pinus brutia* (Ten.), dominates Cyprus forests but faces challenges such as slow growth rates and inadequate regeneration, leading to some areas being excluded from logging for stock recovery. *P. brutia*, while capable of producing quality timber, only contributes about 1.3 m³/ha/year.

In 2019, approximately 2445 m³ of round wood was extracted from state forests and sold for various purposes. The timber-based industries on the island are gradually contracting, and the wood market is shifting towards imported final products due to limited raw material availability. Potential bans on unprocessed round wood exports in Eastern Europe are unlikely to impact Cyprus significantly, given the small quantities of imported round wood (UNECE, 2020).



Conclusion

Based on the examination of fundamental data concerning Cyprus's forestry sector, it becomes evident that there exists a promising prospect for re-establishing collaboration between the governing authority responsible for forest management, namely the Ministry of Agriculture, Rural Development, and the Environment, and EUSTAFOR (The Ministry represented state forests in EUSTAFOR until 2012). Although state-owned forest land accounts for less than 20% of Cyprus's territory, the importance of forest resources is duly acknowledged by relevant institutions. Such collaboration holds the potential to facilitate the enhancement and expansion of the state-owned forest sector, while also offering valuable insights and expertise in the realm of forestry policies and practices.



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- N. 25(I)/2012: The Forest Law of 2012
- K.D.P. 132/2012: The Forestry (Recognition of Organizations of Private Forest Owners) Regulations 2012
- K.D.P. 133/2012: The Forestry (Permits, Use of Forest Roads and Export of Forest Products) Regulations 2012
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VI. GEORGIA



ABBREVIATIONS

ADC - Austrian Development Cooperation

CENN - Caucasus Environmental NGO Network

DCFTA - Deep and Comprehensive Free Trade Area

EUMM - European Union Monitoring Mission

ENPARD - European Neighbourhood Programme for Agriculture and Rural Development

EU - European Union

GDP - Gross Domestic Product

NGO - Non-Governmental Organization

UNECE - United Nations Economic Commission for Europe

UNDP - United Nations Development Programme

US - United States

VI. GEORGIA

Georgia, a small upper-middle-income country in the South Caucasus, has faced challenges in transitioning to a market economy since gaining independence in 1991 due to civil war and territorial disputes. Despite this, it has become one of the most open and business-friendly places in the sub-region. To sustain growth, Georgia must shift from filling essential gaps to experimenting with new ideas, business models, technology, and governance. The remarkable improvement in Georgia is attributed to significant reforms initiated after the Rose Revolution in 2003. These reforms, addressing institutional and legislative frameworks, reduced corruption and enhanced government efficiency. As a result of reforms, GDP per capita in current U.S. dollars increased from \$2,800 in 2009 to \$4,770 in 2019, and GDP per capita based on purchasing power parity doubled, reaching \$15,636 in 2019. Despite these achievements, further reforms are necessary to restructure, diversify, and enhance the economy's productivity (UNECE, 2020).



Relations with the European Union

In June 2022, the European Council recognised the European Perspective for Georgia and expressed readiness to grant the status of a candidate country to Georgia once the 12 priorities specified in the Commission's opinion on Georgia's membership application have been addressed. The EU-Georgia Association Agreement entered into force in July 2016 and strives for political association and economic integration between the EU and Georgia. The EU and Georgia have also entered into a Deep and Comprehensive Free Trade Area (DCFTA), while Georgian citizens have benefitted from visa-free travel to the Schengen area since March 2017. The EU is Georgia's largest trading partner and provides on average over 100 million euros to Georgia annually in technical and financial assistance.

The EU, a climate leader aiming for climate neutrality by 2050, supports Georgia in climate change mitigation and adaptation through initiatives like EU4Climate and financing infrastructure projects that reduce greenhouse gas emissions. The EU aids Georgia in promoting energy efficiency and renewable energy, investing in the rehabilitation of public buildings. Additionally, the EU assists Georgia in biodiversity conservation, protected area development, water resource protection, and waste management. Under the ENPARD program, the EU backs Georgia's efforts in transitioning to sustainable food systems for social, environmental, and economic sustainability.

The EU remains firmly committed to its policy of supporting Georgia's territorial integrity within its internationally recognised borders as well as engagement with the breakaway regions of Abkhazia and South Ossetia, in support of longer-term conflict resolution. Since 2008, an EU Monitoring Mission has operated in the vicinity of the administrative boundary lines. On 1 October 2023, EUMM marks its 15th year of presence in Georgia (EEAS, 2023).

General information on the forest fund

Forests are especially valuable natural resources in Georgia and have exceptional importance at the national, regional and global levels. Georgian forests not only conserve the unique biological diversity of Georgia but ensure



continuous delivery of vital direct and indirect benefits and resources to the population. This in turn facilitates the functioning of the field of economy, the growth of human welfare, and poverty elimination and creates a favourable environment for the sustainable development of the country. Georgia is a rich country in terms of the diversity of its forest ecosystems and forest cover. In 2017, 44.8% of the country's territory was classified as forest land (3.124.200 ha), while the area with actual forest cover accounts for 2.690.000 ha (38.5%). The total stock of wood (stems) in the forests is 454.5 million m³ and the average annual increase of wood stock is 4.5 million m³ (WB, 2020).

The average wood stock volume per hectare is 176 m³ and the average age of Georgian forests is approximately 100-120 years. Broad-leaved trees comprise 80% of the forest, out of which up to 50% are beech (UNDP, 2016).

Georgian forests are primarily natural, making up an impressive 95-98% of the forested landscape. These forests are incredibly rich in biodiversity, hosting around 400 tree and shrub species. Notably, many of these species are unique to Georgia, with 61 endemic to the country and 43 endemic to the broader Caucasus region. The forests in Georgia are spread across seven different natural-historical regions, each with its unique characteristics. From the arid semi-deserts to the lush wetlands of the Kolkheti plain, these forests adapt to diverse environments.

In terms of altitude, Georgian forests cover a wide range, spanning from sea level to 2.600 meters above sea level. This altitude diversity creates distinct vertical belts within these forested areas. Georgian forests play a crucial role in providing shelter and migration routes for numerous animal species, contributing to the preservation of genetic diversity. Situated in one of the world's biologically richest regions, Georgia falls within two "biodiversity hotspots": the Caucasus and Iran-Anatolia. These areas are known for their remarkable biodiversity but are also facing significant threats.

The forested areas in the Georgian mountains are particularly valuable as they represent some of the last untouched forests in the moderate climate zone of the Earth, holding global importance. These forests serve various purposes, meeting the demands of the national economy and the population. They also provide essential social and environmental functions such as water regulation, soil protection, climate regulation, and recreation, making them vital to the state (National Forest Concept for Georgia, 2014).



Analysis of the National Legislative Framework

The legislation of Georgia in the field of forestry comprises the Constitution of Georgia, the international agreements of Georgia, the National Forest Concept for Georgia, the Forest Code of Georgia, other legislative acts of Georgia and bylaws adopted on their basis. Forest Code of Georgia was published on May 28th, 2020 and regulates different aspects of the forestry sector, among others: ownership of the forests, competencies of different governmental bodies, forest management planning etc. The New Forest Code provides a clear vision of how to reduce illegal logging and manage forests sustainably (Forest Code, 2020).

The Parliament of Georgia in June 2023 discussed and approved amendments to the State Property aimed at reducing illegal logging. As part of the amendments to the Law of Georgia on State Property, wood plants illegally obtained within the boundaries of state forests will be transferred to forest management bodies. This change would enable the latter to use the removed timber to meet a part of the "social needs for timber resources" and reduce the scale of logging.

The National Forest Concept of Georgia has been prepared by the Ministry of Environment and Natural Resources Protection and the National Forestry Agency of Georgia in the framework of the project Sustainable Forest Management in Georgia implemented by the Caucasus Environmental NGO Network (CENN) with financial support from Austrian Development Cooperation (ADC). The National Forest Concept for Georgia was adopted in 2013 by the Georgian Parliament. It defines the State's approach to forests, taking into account the main functional purpose of forests and their values. The Concept shall apply to all forests of Georgia irrespective of the forms of ownership, possession and management. This document will serve as a basis for the development and improvement of the forestry sector-related legislation, institutional set-up and other policy documents.

The goal of the Concept is to establish a system of sustainable forest management that will ensure: the improvement of the quantitative and qualitative characteristics of Georgian forests, protection of biological diversity, effective use



of the economic potential of forests taking into account their ecological value, public participation in forest management related issues, and fair distribution of derived benefits.

In 2021, Georgia adopted the National Climate Change Strategy and updated its Nationally Determined Contributions to the Paris Agreement. According to this ambitious Climate Promise, by 2030, Georgia will unconditionally reduce greenhouse gas emissions to 35% below the 1990 baseline level and will increase forest carbon capture capacity by 10% from the 2015 levels (UNDP, 2022). Since Georgia signed the Association Agreement with the EU in 2014, it is still adjusting the strategic and legal framework to European standards.

Organization of the state forestry sector

Georgia's Forest Fund is a valuable state asset, comprising various areas earmarked for different purposes. These purposes include agriculture, ecology, social needs, economic activities, and more. To manage this resource effectively, the fund is categorized as follows:

- protected areas within the state forest fund - 312.9 thousand ha (10.4% of forests): state nature reserves - 136.6 thousand ha (4.6%), national parks - 134.8 thousand ha (4.5%), natural monuments - 0.3 thousand ha, forbidden areas - 33.7 thousand ha (1.1%), protected landscapes - 7.5 thousand ha (0.2%) and
- state agricultural forest fund - 2.694.7 thousand ha (89.6% of forests): resort forests - 119.4 thousand ha (4.0%), green zone forests - 276.5 thousand ha (9.2%) and soil protection and water regulation forests - 2298.8 thousand ha (76.4%).

Special use or leasing of forests and forest lands can be initiated by the forest management authority or requested by interested individuals or organizations. These special use arrangements can be short-term (up to 2 years) or long-term (up to 49 years), depending on the specific needs and objectives.

The market value of the annual lease rent of the forest use facility to issue the right of special use of the forest is determined based on the auditor's (expert's) report, which is taken as the annual starting price of the auction to



be announced (except for the case of the placement of the line structure of electronic communication networks). In the case of a conditional auction, the annual starting price of the auction can be determined by the decision of the Government of Georgia in an amount lower than the price established based on the auditor's (expert's) report. Simultaneous implementation of different types of forest use (complex forest use) is allowed if they do not significantly interfere with each other. Forest use rights are obtained through electronic auctions with the help of the administration, and the interested person should fill out the application form and present it together with other documents to the National Forestry Agency, which decides upon the request (National Forestry Agency, 2023). Georgia has a system of social forest management or social cut through which rural communities are entitled to subsidized fuelwood from state forests (i.e., forests and forest authorities provide social services without financing from formal social programs).

Wood energy covers some 50% of the population's energy needs. Georgia's forests have poor accessibility, which has impeded their commercial utilization. 80% of forests are located on mountains with slopes steeper than 20°, while 70% are located 1000 m or more above sea level, with only 7% below 500 m. One-third (31%) of forests can be found at altitudes of 1.500 to 2.000 m above sea level. Moreover, 43% are located on 31° or steeper slopes.

The National Forestry Agency in Georgia, representing the Ministry of Environment Protection and Agriculture, manages a vast expanse of state-owned forests, covering 1.922.177 ha, with 1.808.000 ha under forest cover. Operating across nine regions, the agency focuses on forest management, inventory, and restoration planning. The agency's mission revolves around preserving and improving forest quality and quantity, promoting sustainable forest management, and supporting rural communities. Its priorities include enhancing maintenance and restoration efforts, improving planning and monitoring, and boosting public awareness.

In 2022, the agency procured 187.026 m³ of wood resources, with 151.567 m³ sold through auctions and direct purchases and 277.580 m³ used from social felling forests. This highlights its crucial role in managing Georgia's forests.



Socio-economic aspects

Georgian forests are required to meet the different demands of the national economy and the population. Forest resources are crucial for carrying out social-environmental functions e.g. water regulation, soil protection, climate regulation, recreational, resort, sanitary-hygienic, aesthetic and other useful functions of great significance to the State.

Georgia's forests provide timber for industrial and household use, as well as non-timber resources including medicinal plants. Forestry activities and processing of forest resources can generate significant value and work possibilities, and thus increase incomes and prosperity of the rural population. Georgian forests have vital importance for the safety and well-being of the population, as well as for different industries. Clean water supply for the major part of the Georgian population depends on forests. Water supply for agriculture, hydro energy, etc. depends on forest ecosystem health. Forests regulate water quality and mitigate the risk of flooding and flash flooding by regulating the run-off of precipitation. They also help to prevent soil erosion and mitigate the risk and impacts of landslides, avalanches and mudflows.

Georgia is well known both for its very high biodiversity and for heavy pressures on the forest resources from illegal logging and legally guaranteed firewood supply for the local population. Georgia Wood Market Study estimates that, in 2014, the volume of timber harvested for fuelwood and industrial use was around 2.7 to 3 million m³ or four to five times the officially recorded harvest. The study found that at least 75% of timber (2 to 2.3 million m³) was harvested illegally, while illegal logging was only 45.915 m³ in 2017 according to official statistics. While there have been variations in logging volumes over the years, it is evident that logging estimates based on implicit consumption are by an order of magnitude higher than the legal harvesting and illegal logging detected and officially recorded by law enforcement.

In the year 2022, the total amount of illegally harvested wood was 15.870 m³. As for the period from January to June 2023, the National Forestry Agency has identified 605 cases of illegal timber harvesting and transportation throughout the country (National Forestry Agency, 2023).



Roundwood export from Georgia is prohibited. Accordingly, logs go through processing to produce sawn wood and other products for exports and use in domestic markets. This has led to the vertical integration of the industry in Georgia. Logging (felling, skidding, haulage) and processing (mainly sawmilling) are vertically integrated in companies that hold a wood harvesting licence. As a result, many firms produce primary (i.e., low- and high-quality sawn wood, sawn boards/beams, planks, etc.) as well as some secondary industrial products (i.e., builders' joinery, unassembled flooring, wood packaging, etc.) for construction and woodworking industries. Some licence holders also can produce furniture and plan to expand their production by introducing new production lines to manufacture high-quality furniture (WB, 2015).

Conclusion

Georgia has a well-defined legislative framework for forestry, including the Forest Code, National Forest Concept, and recent amendments aimed at reducing illegal logging. The country is also aligning its strategic goals with international commitments, as seen in its National Climate Change Strategy and updated Nationally Determined Contributions to the Paris Agreement. As for the organizational structure of the state forestry sector in Georgia, the National Forestry Agency plays a central role in managing state owned forests and implementing sustainable forest management practices. The agency's mission aligns with EUSTAFOR's objectives, emphasizing forest preservation, sustainable management, and community support.

While the information provided suggests potential alignment, more detailed analysis and direct engagement with relevant authorities - The National Forestry Agency in Georgia would be necessary to confirm interest and eligibility for EUSTAFOR membership. Overall, Georgia's commitment to sustainable forestry practices and its ongoing efforts to align with international standards make it a candidate that may find value in participating in the EUSTAFOR network.



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VII. GREECE



ABBREVIATIONS

CEEC - Central and Eastern European Countries

EU - European Union

FAO - Food and Agriculture Organization (of the United Nations)

FMP - Forest Management Plans

GSF NE - General Secretariat of Forests and Natural Environment

MOEE - Ministry of Environment and Energy (Greece)

UNECE - United Nations Economic Commission for Europe

VII. GREECE

Greece, officially known as the Hellenic Republic, is a southeastern European country with thousands of islands in the Aegean and Ionian seas, covering 131.957 km². It has a population of about 10.7 million, and its capital, Athens, is the largest city, hosting approximately 3.15 million people. Situated at the crossroads of Europe, Asia, and Africa on the Balkan Peninsula, Greece shares borders with Albania, North Macedonia, Bulgaria, and Turkey. The country boasts the longest Mediterranean coastline, stretching 13.676 km, and 227 of its numerous islands are inhabited. With 80% of its terrain being mountainous, Greece is home to Mount Olympus, the highest peak at 2.918 m. Greece operates as a unitary state with decentralized forest governance organized into seven Decentralized Administrations following a 2011 territorial reform (CEEC Forestry, 2023).

Relations with the European Union

Greece has been a member of the EU since January 2001, and the Schengen area since January 2000. The key sectors of Greece's economy in 2020 included wholesale and retail trade, transport, accommodation and food services (23.8%), public administration, defence, education, human health, and social work activities (21.6%), and real estate activities (15.9%). In terms of trade, 57% of Greece's exports go to other EU Member States, with Italy at 11% and Germany



at 8%. Outside the EU, 4% of exports are directed to Turkey and 4% to the United States. Regarding imports, 57% originate from EU Member States, primarily Germany at 12% and Italy at 9%. Non-EU imports include 8% from China and 6% from Russia. Greece maintains communication with EU institutions through its permanent representation in Brussels, serving as its main channel to advocate for the country's interests and policies within the EU (EU, 2023).

Based on the UN Forum on Forests report from 2022, Greece fully aligns with the EU declaration and, as a Mediterranean country with diverse landscapes, faces climate change challenges like droughts, floods, and wildfires. The National Forest Strategy (2018-2038) outlines objectives, resources, and means for sustainable forest management, emphasizing a multifunctional role. Initiatives include a new national forest inventory and a reforestation plan to plant over 20 million trees by 2030, starting with a pilot project on Mount Parnitha in 2022 and the main project in 2023. This plan, integrated into the National Recovery and Resilience Plan, aims to enhance the national forest balance for environmental and social benefits, contributing to climate change mitigation, adaptation, and biodiversity protection. In response to recent devastating wildfires, over 70 million euros have been invested in forest protective measures, including selective logging and maintenance, partnering with the Hellenic Republic Asset Development Fund. New legislation allows private sector funding for burnt forest restoration projects supervised by the forest service, with over 14 million euros already donated. Forest fire prevention plans will target susceptible ecosystems, and by the end of summer, approximately 90% of the country's forest maps will be ratified. Collective efforts are crucial to protect our planet and ensure a shared future.

General information on the forest fund

In Greece, most of the forests and forested lands are State-owned (74.1%). The rest are municipal (9.0%), church-owned/other non-profit Foundations (10.4%) and private (6.5%). Of the total high forests, conifers cover about 58.40% whereas broadleaves cover 41.60%. Of the total forests and forested lands around 41.3% are high forests, mostly naturally regenerated. The rest are partly forested areas, bushlands, grazing lands, rocky areas or bare lands (Spanos, 2021).



According to the FAO, 30.3% or about 3.903.000 ha of Greece is forested. Greece had 140.000 ha of planted forest. Between 1990 and 2010, Greece lost an average of 30.200 ha or 0.92% per year. In total, between 1990 and 2010, Greece gained 18.3% of its forest cover, or around 604.000 ha. Greece's forests contain 79 million metric tons of carbon in living forest biomass. Greece has some 614 known species of amphibians, birds, mammals and reptiles according to figures from the World Conservation Monitoring Centre. Of these, 2.6% are endemic, meaning they exist in no other country, and 5.7% are threatened. Greece is home to at least 4.992 species of vascular plants, of which 14.9% are endemic. 1.8% of Greece is protected under IUCN categories I-V (Greece Forest Information and Data, 2023).

Approximately 60% of Greece's land is covered by forests and wooded areas, with 40% of these located in Natura 2000 sites. All Greek forests receive primary protection under the country's constitution, and national legislation emphasizes sustainable forest management principles, including biodiversity conservation and diverse land use. Forest ownership in Greece is predominantly public, with a smaller portion owned by Monasteries, municipalities, or private citizens. Forest Services ensure sustainable management through Forest Management Plans (FMP), aligning with national legislation's principles of sustainability, biodiversity conservation, and multiple land uses. Specific measures are implemented to safeguard landscapes and preserve biodiversity during the planning and utilization of forest ecosystems (CEEC Forestry, 2023).

Analysis of National Legislative Framework

Greece's National Forest Strategy made an effort to incorporate the forestry strategy of the EU and its key priorities while taking into account the various qualities of Greek forests, such as their protective role, multiple functions, significant contribution to the ecosystem, and efforts to produce innovative forestry and products with added value. Additionally, the National Forest Strategy of Greece seeks to address two significant environmental problems in Greece: the restoration of forest ecosystems and the absence of effective forest management, which are two of the biggest inefficiencies for Greek forests (Kalogiannidis, 2022).



Forest Management Plans (FMP) serve as the primary tool for managing forests and forest lands, emphasizing their multifunctional role and sustainability. These plans incorporate measures to protect biodiversity during harvesting, reflecting a commitment to ecosystem services and sustainability. From 2009 to 2018, around 40% of forests were sustainably managed through FMP application. Timber-related matters are regulated by EU laws, including EU Regulation (2173/2005 and 1024/2008), the FLEGT Regulation, and the EU Timber Regulation (995/2010) on illegal logging, which Greece, as an EU member state, implements. A National System for Certifying Sustainable Forest Management is under development in collaboration with the Greek Institute of Mediterranean and Forest Ecosystems. Forest fire management is addressed through specific Technical Requirements and an Action Plan adopted in 2019. The 2018 National Forest Strategy outlines forest policy principles, objectives, resources, and implementation means for 2018-2038. It supports the "Mediterranean forestry model," tailored to Greece's conditions, promoting multifunctional forest ecosystems through clear planning at national and regional levels. (CEEC Forestry, 2023).

The NFS determines the principles of forest policy in Greece for the next twenty years, emphasizing the model of Mediterranean forestry and sustainable forest management. The National Forest Strategy of Greece includes seven axes, three horizontal (forestry governance, inventory-monitoring, research innovation) and four vertical (forest economy, climate change, forest ecosystems protection and ecosystems services optimization, international and European policies). All axes are structured by general goals, directions of action, and indicators.

The National Forest Strategy of Greece attempted to incorporate the EU Forestry Strategy and its key priorities, taking into consideration unique characteristics of Greek forests such as the protective role of the forests, the multiple roles of forests, the significant provision of ecosystem services, the impact of climate change and the efforts for the production of innovative forestry and added-value forest products. The Mediterranean forestry model, adopted by the National Forest Strategy of Greece, is well-adjusted to the local conditions, enhancing the multiple roles of forests. One of its key characteristics is that it promotes cooperation with rural communities, leading to local development and job opportunities that subsequently can increase the contribution of the forest sector to the country's Gross Domestic Product.



However, the structural problems of the Greek forest sector cannot be resolved quickly. On the contrary, they require in-depth policy changes, reprogramming of forest funds, promotion of new investments, and restricting the implementation of the new wide-ranging vision of the NFP (Tsiaras, 2021).

Provisions for sustainable forest management are included in National legislation, which stresses the principles of sustainability, conservation of biodiversity and multiple uses of forest lands. Special measures have to be taken for the protection of the landscape and conservation of biodiversity during the management planning and utilization of forest ecosystems.

The 1975 Constitution, Laws 86/1969, 998/1979 and 1650/1986 constitute the basic legal framework of the country for the protection and management of forest and other wooded land. For the first time in the history of the country forest and other wooded land are protected by articles 24 and 117 of the Constitution.

Law 86/1969 codified almost all the laws that had been issued since 1928 and had been amended and completed by Law 4173/1929. This law constitutes the Forest Code of the country and regulates matters concerning the protection, management, real property rights on forest land, taxation, exploitation of state and privately-owned forests, forest improvement works etc. This code continues to constitute the basic body of forestry legislation, although a lot of its provisions were amended and substituted by other laws such as Laws 886/1971, 996/1971, 248/1976 and 998/1979.

Law 998/1979 "On the protection of the country's forest and other wooded land" determines the specific protection measures for maintaining, developing and improving forest and other forest land of the country. This in turn aims at maintaining and improving the whole natural environment by direct reference to the legal status governing their ownership and use (UNECE).

Organization of the state forestry sector

The central government's primary responsibility for forest-related matters falls under the purview of the Ministry of Environment and Energy (MoEE), specifically through the General Directorate for the Forests and the



Forest Environment. Managing the nation's state forests and overseeing private forests is primarily entrusted to the Forest Service, an integral component of the Ministry of Agriculture, known as the General Secretariat of Forests and Natural Environment (GSF&NE).

The GSF&NE comprises the Central Service and Regional Services. The Central Service serves as the supervisory body overseeing the entire administrative structure of the GSF&NE and consists of six Directorates. These Directorates are responsible for formulating forest policy, developing long-term forest development programs, monitoring scientific and technological advancements in forest management, overseeing research initiatives, and fostering international cooperation with the EU, third countries, and International Organizations.

The Regional Services are responsible for implementing the forest policy directives established by the Central Service. They are also tasked with executing local programs and studies. These Regional Services are further categorized into Intraprefectural and Prefectural Services. The Intraprefectural Services encompass 13 Forest Inspectorates, each corresponding to one of the 13 administrative regions in the country. The Prefectural Services consist of 31 Forest Directorates, which include 80 Forest District Offices, and 24 Directorates without Forest District Offices. Additionally, two Reforestation Directorates operate in the Attica and Thessaloniki Prefectures.

Within the framework of the GSF&NE, various collective bodies and instruments operate, including the Revisional Council for Forest Property, the Forest Technical Council, the Forest Property Council, as well as Regional Councils and Committees (National Report of Greece, UNECE).

Forests and forested areas are effectively managed through the implementation of Forest Management Plans (FMP). These plans serve as the fundamental tools for overseeing forest and forest land management.

The technical specifications of FMP prioritize recognizing forests as multifunctional ecosystems and emphasize sustainability as a central tenet of forest management. To promote sustainability, FMPs consider ecosystem services and implement protective measures to preserve



biodiversity during harvesting operations. Regarding forest fire management, specific Technical Requirements for developing plans to protect forests and forest ecosystems from fires are in place. Furthermore, an Action Plan for forest fire prevention was adopted in 2019 to address this critical issue.

Socio-economic aspects

The forest sector employs a workforce which -especially in the case of forestry- comes from the same areas where forests grow. Manpower employed in forestry is divided into permanent and seasonal personnel. Permanent personnel employment is legislatively regulated by the Code of Officials, which determines the relations between the state and officials, Law 2470/1997 which is concerned with the payroll of employees and Law 2084/1992 which determines the insurance status of employees (National Report of Greece, UNECE).

Timber production coming from state and non-state forests has fallen considerably during the last years - by 50% from 1990 to 2003. This reduction, which is sharper in the fuel wood category than in commercial harvest, is due mainly to the substitution of wood as a heating source by liquid fuels and electricity, urbanization and the low competitiveness of Greek timber in the international market. Industrial round wood accounts for 35% of the total timber production and is considerably lower than fuel wood. Saw log production is even smaller and accounts for 15% of the total yield.

Employment in the forestry sector refers to a total number of 26,000 employees, 4,000 of which are permanent staff and the rest are seasonally occupied personnel. Employment in the forestry sector decreased by approximately 30% during the last decade. The low contribution of the forest sector to the GDP is because the forests of the country are of low productivity and their role is primarily protective (Climate Change Post, 2023).

Issues concerning timber are governed by EU Regulation, the FLEGT Regulation and its implementation, which establishes a voluntary licensing scheme for forest law enforcement, governance and trade in the European Community. Greece additionally, as an EU member state, is implementing the EU Timber Regulation (995/2010) on illegal logging.



Greece, together with the Netherlands, is ranked 25th among the 29 countries of the European Continent that provide sufficient data on the contribution of the forestry sector to their Gross Domestic Product (0.04%) with data for the year 2019. In Greece, forest production is concentrated in the Regional Unit of Drama located in the northeast of the country and in the Region of Eastern Macedonia and Thrace, where we find large forest and transitional forest areas, as well as pastures. The second-most valuable regions of Greece in terms of forest production are the Regional Units of Grevena and Florina in the northwest of the country, in the Region of Western Macedonia in Northern Greece. Consequently, Greece's national Forest industry has had a trade imbalance in forest products. To meet local demand, Greece imports more forest products than it exports (Kalogiannidis, 2022).

Conclusion

Greece does have a significant forest management system in place, which includes forest management plans, sustainability considerations, and fire protection measures. The General Directorate for the Forests and the Forest Environment is responsible for protecting and managing state forests, making it a key body for forest-related functions in the country. Given the presence of a well-structured forest management system and the emphasis on sustainable forest management, the General Secretariat of Forests and Natural Environment potentially can be interested in becoming a member of EUSTAFOR.



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Law 4423/2016 (Government Gazette A' 182) "Forest Cooperative Organizations and other provisions"

Law 4342/2015 (Government Gazette A' 143), Article 32 Amendments to the provisions of Law 4280/2014 (A' 159) 4280/2014 (Government Gazette A' 159)

Environmental upgrading and private urban development – Sustainable development of settlements Forest legislation regulations and other provisions

VIII. MOLDOVA



ABBREVIATIONS

BAU - Business as Usual

CSDP - Common Security and Defence Policy

DCFTA - Deep and Comprehensive Free Trade Area

EU - European Union

LPA - Local Public Authorities

MARDE - Ministry of Agriculture, Regional Development and Environment

NFERP - National Forest and Environmental Reform Program

NTFP - Non-Timber Forest Products

INSTAT - Institute of Statistics in Albania

SFE - State Forest Enterprises

UN - United Nations

UNDP - United Nations Development Programme

WB - World Bank

VIII. MOLDOVA

The Republic of Moldova is a landlocked country with Romania to the west and Ukraine to the north, east and south. Moldova is home to 2.6 million people (52.3% women and 47.3% men). The population is decreasing due to outmigration and natural population decline (a 9.5% decrease since 2014). The country's Gross National Income per capita was US\$ 4,560 in 2020, placing the country at the upper end of lower-middle-income economies (UN, 2022).

In February 2022, Moldova became a recipient and transit country for refugees because of the ongoing war in neighbouring Ukraine. As of the end of April 2022, over 440,000 people had already entered the country, either headed to other destination countries or staying, making Moldova the largest recipient of refugees in per capita terms of all countries receiving refugees (UNDP, 2022).

Moldova's growth model faced stark vulnerabilities during the pandemic, the energy crisis, and the fallout from Russia's invasion of Ukraine. Proximity to the conflict and the nation's status as a small, energy-dependent, landlocked



economy with close ties to Ukraine and Russia amplified the impact. The war and subsequent price spikes led to additional fiscal burdens, hampering long-term development priorities. The influx of refugees further strained resources, creating a challenging socio-economic environment, especially if unemployment persists. The country's energy security remains a major concern due to heavy dependence on imports and limited supplier diversification. Reliance on short-term contracts, particularly for energy, heightens vulnerability. Despite regional and national decreases in energy prices, they remain unaffordable for both residential and non-residential consumers, impacting the competitiveness of businesses and household incomes, especially for the poor (WB, 2023).

Relations with the European Union

Since 2014, EU-Moldova relations have been governed by the Association Agreement, featuring a Deep and Comprehensive Free Trade Area (DCFTA). Signed in June 2014, the agreement strengthens political ties and economic integration, fostering common values and cooperation. The DCFTA simplifies trade by reducing tariffs, streamlining customs procedures, and gradually aligning Moldovan legislation with EU standards. The Agreement was provisionally applied from September 2014, until full implementation in July 2016, following the ratification process.

EU-Moldova relations have entered a new strategic phase since the European Council recognised Moldova's European perspective and granted it EU candidate country status in June 2022. In March 2023, the European Council reaffirmed that the European Union would continue to provide all relevant support to the Republic of Moldova to strengthen the country's resilience, security, stability and economy and help it on its path to EU accession. The European Council invited the Commission to present a support package ahead of its next meeting. The EU has allocated 243 million euros in humanitarian assistance to help civilians affected by the war in Ukraine. This includes 230 million euros for Ukraine and 13 million euros for Moldova. In April 2023, the European Union launched the EU civilian mission in Moldova (EUPM Moldova) under the Common Security and Defence Policy (CSDP) (Delegation of the European Union to the Republic of Moldova, 2023).



The EU, through the EU4Environment Programme, supports Eastern Partner countries like Moldova in sustainable natural habitat management, reducing biodiversity loss, and expanding protected areas. Moldova's forests, vital for biodiversity and the economy (providing \$70 million in annual ecosystem services), face threats from exploitation and unauthorized logging. The program aligns with Moldova's commitments under the 2014 EU Association Agreement and Deep and Comprehensive Free Trade Agreement, aiding structural reforms and legislation harmonization. Moldova's National Forest and Environmental Reform Program (NFERP) not only aligns with international initiatives but also supports the European Green Deal, aiming for climate targets and resilient ecosystems by 2050 (The European Union Delegation to the Republic of Moldova, 2023).

The 2014-2023 National Environmental Strategy aims to restore degraded land and increase the national forest cover. Objectives include improving soil quality, restoring lands affected by landslides, and buffering farmland up to 100%. The strategy targets a 15% national forest cover by planting 150,000 ha of forests, including on degraded land, and establishing 30,000 ha of riparian forest belts. This goal aligns with other national strategies, such as the 2015-2020 Strategy on Biological Diversity, and includes greenhouse gas mitigation targets for various sectors, including Land Use, Land Use Change, and Forestry. The latter aims to increase CO₂ net removals by 25% compared to Business-as-usual (BAU) levels by 2020 (UNDP, 2015).

General information on forest fund

National Forest Land (NFL) accounts for 419,100 ha or roughly 12.7% of the country's territory. Distribution among different categories of owners is shown in the following table. The majority of forestland (87.2%) is under state property, with the rest owned by municipalities (12.2%) and only 0.6% by private owners. Despite a relatively insignificant share, privately owned forest resources are growing continuously - these have tripled in size and share. Moldova's forests, constituting 13.6% of national forests, serve land and soil protection purposes against industrial and climate factors. Community and private forests, mainly acacia, lack comprehensive management plans (only 25%) and face challenges like illegal grazing, logging, and waste pollution.



Forest vegetation outside designated areas includes protective belts along agriculture, roads, rivers, and water basins, totalling 49.1 thousand ha. However, these areas lack proper development, management, and adherence to ecological and forestry requirements. The composition of Moldova's forests is predominantly deciduous (97.8%), with oaks being the most valuable species covering 39.6% of the forest area. Oaks are primarily managed through coppicing, impacting their productivity. The total standing wood volume is approximately 45 million m³, with an average of 124 m³ per ha. Forest management by the main entity, Agency Moldsilva, covers 82.1% of the total National Forest Fund (NFL), while the rest is owned by local authorities, the Ministry of Transport and Road Infrastructure, and Agency Moldova Waters, primarily for protective purposes in agricultural fields, roads, and water bodies (Agentia Moldsilva, 2023).

Analysis of National Legislative Framework

The primary forestry policy document in Moldova is the 2001 "Strategy for the Sustainable Development of the Forestry Sector". The government decided to implement this strategy in 2003, but it was later revoked in 2012 along with other policy documents. The strategy emphasized the invaluable role of forests in providing goods, products, and ecological balance for societal development. Since the strategy's approval, significant changes have occurred, and current challenges facing the forestry sector, such as excessive consumption of wood and game resources, have become more apparent. Despite growing interest in forest products and services, finding a balanced solution requires a correct approach to ensure rational use and prevent resource exhaustion. The primary legal document governing forest related matters in Moldova is the Forest Code (1996), which addresses forest use, land and water protection, and the conservation of flora and fauna. Since its enactment, the Forest Code has undergone several modifications (2001, 2003, 2005, 2009, 2011, and 2012).

However, a review of the Forest Code from 2015, reveals outdated provisions and the need for adjustments to align with EU directives and international agreements related to forestry, biodiversity, climate change, and deforestation.



Notably, the current Forest Code lacks chapters addressing the administration and management of public forest properties owned by local public authorities (municipal forests), forests along state borders, and the private forest sector.

Organization of the state forestry sector

The current forest institutional framework involves the Ministry of Agriculture, Regional Development, and Environment (MARDE), overseeing policies and regulations. Subordinate institutions include Moldsilva (enforcing forest policy), the Environmental Agency (authorizing natural resource use), and the Ecological State Inspectorate (enforcing environmental legislation). LPAs manage their forests, but there's a blurred line between their responsibilities and Moldsilva's mandate over communal forests. State management relies on 25 independent State Forest Enterprises (SFEs) overseeing all state public forests. Communal forest management varies, with only some handled by municipal enterprises. Moldsilva, a self-financed state agency, coordinates SFEs, enforces policies, and provides extension services. Despite some budgetary allocation, Moldsilva's role extends beyond management, contributing significantly to policy development (Talpa, 2021).

Agency Moldsilva is the central public administration body on state policy in forestry and hunting in the country. Agency Moldsilva is subordinated directly to the Government of the Republic of Moldova and performs its activity according to Governmental decision No. 150 from 02.03.2010. The general task of the Agency is to implement the constitutional prerogatives and internationally ratified obligations of the Republic of Moldova on the development, promotion and implementation of its policy in forestry and hunting, directed on the international trends of socio-economic sustainable development, rural development, rural employment, sustainable forestry, development, guarding, forests and wildlife protection, maintenance and conservation of biodiversity, professional training, access to environmental benefits and forestry research and education.

The main tasks of the Agency Moldsilva are administration and management, through subordinated enterprises and organizations, of the forestry and hunting resources, that are public property; development and implementation of forest security and protection measures; organization



of forest and hunting management, their review with a periodicity of 10 years; forest regeneration and afforestation of the managed forests, an extension of land covered by forest and creation of forest belts for protection of fields and waters, erosion strips on a contractual basis; restoration of native forest biocoenosis through ecological restoration; ensuring natural forests biodiversity and continuity (Agentia Moldsilva, 2023).

The structure of Agency Moldsilva includes 25 subdivisions, including 16 forest enterprises, 4 forest hunting enterprises, 4 nature reserves, and the Forest Research and Management Institute. Within these units 5245 employees are employed, of which technical and engineering personnel constitute 990 employees. The number of industry professionals is complemented annually with forest profile graduates from universities and colleges in the field (Botnari, 2011).

Socio-economic aspects

Forests play a crucial role in the sustainable development of the Republic of Moldova by supplying both timber and non-timber forest products (NTFP), especially for the rural population. Additionally, they provide essential ecosystem services such as soil protection, biodiversity conservation, and carbon sequestration. Despite their significance, forest resources face various pressures. In rural areas where approximately 60% of the 3.55 million Moldovans reside, many households rely on firewood for heating and cooking due to financial constraints that prevent the regular use of electricity or gas.

In Moldova, only 12% of the country's land is covered by forests, making it one of the European countries with the lowest forest cover. The remaining forests face significant threats from illegal logging driven by commercial interests and the reliance of rural communities on firewood for heating and cooking. Rural households, with an average monthly income of 80 euros, often cannot afford regular electricity or gas use, leading to widespread dependence on cheaper, illegally harvested firewood. This situation contributes to deforestation and degradation of protected forest belts, leading to land degradation across Moldova. Over the past decades, soil erosion-affected land has increased by approximately 6.400 ha annually. Currently, around 880,000 ha of land, equivalent to one-fourth of the country's total territory or 40% of agricultural land, suffers from erosion (UNDP, 2015).



Moldova's forestry sector represents a small portion of the Gross Domestic Product (GDP) - 0.3% but it is a priority in terms of development considering the social, economic and environmental implications for the country (Popa, 2014).

Conclusion

The Forestry Fund in the Republic of Moldova, although receiving increased attention in recent years, faces significant mismanagement issues. The existing legislation does not align with current realities, featuring contradictory provisions inconsistent with the state's forestry policies. To effectively address these challenges, a new forest management policy is essential, emphasizing the conservation of biological diversity, the training of forestry staff, harmonization of the legislative framework, and international cooperation. The state forest policy underscores the main function of forests in protecting the environment and maintaining ecological balance. Success in the forestry sector depends on achieving tasks that enhance its contribution to the country's social, economic, and environmental well-being. The existing legislation, rooted in outdated management principles, has several shortcomings, necessitating improvement to align with contemporary social and economic conditions both regionally and globally.

Integration into the European family should be substantiated by tangible actions, with EU countries serving as examples for the forestry sector. Moldova must find its unique path for forest resource development and conservation, learning from the experiences of other countries, including the EU, to achieve sustainability.

Agency Moldsilva is the central body responsible for state policy in forestry and hunting. In the period of study preparation, Agency Moldsilva submitted an Application Form to become an associated member of EUSTAFOR (currently under examination by the Executive Committee).



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Forest Code nr. 887-XIII from 21 July 1996

Law nr. 1515-XII from 16 June 1993 on environmental protection

Law nr. 439-XIII from 27 April 1995 on Animal Kingdom

Law nr. 1102-XIII from 6 February 1997 on natural resources

Law nr. 1538-XIII from 25 February 1998 on state-protected areas

Law nr. 591-XIV from 23 September 1999 on green areas of urban and rural localities

Law nr. 1041-XIV from 15 June 2000 on amelioration through afforestation of degraded lands

Law nr. 325-XVI from 15 December 2005 on the Red Book of the Republic of Moldova

Law nr. 239-XVI from 8 November 2007 on the vegetal kingdom

Law nr. 94-XVI from 5 April 2007 on ecological network

Law nr. 91-XVI from 5 April 2007 on public property lands and their delimitation
Law nr.272 from 23 December 2011 on water

Strategy for sustainable development of the forestry sector of the Republic of Moldova (approved by Parliament Decision nr. 350-XV from 12 June 2001)

Strategy for the biological diversity of the Republic of Moldova for the period 2015- 2020 and Action Plan for its implementation (approved by Governmental Decision nr. 274 from 18 May 2015)

Environmental strategy for the period of 2014-2023 and Action Plan for its implementation (approved by Governmental Decision nr. 301 from 24 April 2014)

National Plan for the Expansion of Forest Vegetation Areas for the period of 2014- 2018 (approved by Governmental Decision nr. 101 from 10 February 2014)

National program on establishing the national ecological network for the period of 2011-2018 (approved by Governmental Decision nr. 593 from 1 August 2011)

National strategy for agricultural and rural development for the period of 2014- 2020 (approved by Governmental Decision nr. 409 from 4 June 2014)



IX. MONTENEGRO



ABBREVIATIONS

EU - European Union

SAA - Stabilisation and Association Agreement

SWG - Regional Rural Development Standing Working Group in South Eastern Europe

IX. MONTENEGRO

Montenegro is located in the west-central Balkans at the southern end of the Dinaric Alps. It is bounded by the Adriatic Sea and Croatia (southwest), Bosnia and Herzegovina (northwest), Serbia (northeast), and Albania (southeast). Montenegro encountered a lot of changes in status before becoming the last European country to have achieved its independence in June 2006. With woodlands covering more than two-fifths of Montenegro, forestry is economically important.

Relations with the European Union

In October 2007 Montenegro signed a Stabilisation and Association Agreement (SAA) and an Interim Agreement on trade and trade-related issues. The latter entered into force on 1 January 2008 while the SAA entered into force on 1 May 2010. By the act of signing the Stabilisation and Association Agreement, Montenegro formally agreed to an association with the European Community and its Member States, thereby accepting responsibility for its European future. Montenegro applied for EU membership in December 2008. At its meeting on 23 April 2009, the Council asked the Commission to submit its opinion on Montenegro's application. In 2010, the Commission delivered a positive opinion on Montenegro's application and at its meeting on 16-17 December 2010, the European Council agreed to give Montenegro candidate country status.

The EU-Montenegro accession negotiations started in June 2012. So far, 33 out of 35 negotiation chapters have been opened.



In May 2021, the Council agreed on the application of the revised enlargement methodology to the accession negotiations with Montenegro and Serbia, aiming to reinvigorate the accession process, place a stronger focus on fundamental reforms and give more political steer. It also groups the 35 negotiating chapters into six clusters.

At the EU-Montenegro Stabilisation and Association Council, which was held in Podgorica in July 2022, ministers discussed Montenegro's accession strategy and reviewed the country's progress in its preparations for EU membership. With more than EUR 610 million in non-refundable aid since 2007, the European Union is the biggest donor in Montenegro and the country's number one partner in supporting the development and ongoing reforms. The long-standing financial assistance has been spent on programmes and projects which fostered the development and concrete reforms, thus contributing to the well-being of citizens in many areas (Delegation of the European Union to Montenegro, 2021).

General information on forest fund

Forests in Montenegro are a crucial natural resource, especially in the northern regions where the most economically utilized forests are located. Forestry activities play a vital role alongside agriculture, supporting rural households and farms. This significantly influences the income of the local population. Montenegro's forests maintain high biodiversity, preserving their natural composition and offering a broad range of ecosystem services. Regarding ownership, 52.3% of forests are state-owned, while 47.7% are privately owned. State-owned forests, covering 71% of high natural forests, contrast with private forests, where this figure is only 17%. The total natural forest area is 821,500 ha, with 5,500 ha dedicated to planted forests. Recent years have seen an increase in forested areas due to migration from rural areas. The forests predominantly feature broadleaved trees, constituting 76.2% of the forest area with a volume per hectare of 136.3 m³. In contrast, conifers cover 293.5 ha, representing 40.2% of the volume. Conifers exhibit a higher average increment of 8.1 m³ per ha compared to 2.9 m³/ha for broadleaved trees. Conifers contribute 46.6% to the overall increment (SWG, 2023).



Review of the National Legislative Framework

The legislation relevant to forestry in Montenegro includes the Law on Forests, the Law on the reproductive material of forest trees, the Law on Nature Protection, the Law on National Parks, and the Game and Hunting Act.

The revised forest strategy from 2018, focuses on two main goals: equal and sustainable valorization of existing forest resources and the growth of investments in forestry and wood processing. Operational goals include establishing a state-owned forest management company, improving financial resources for state forestry institutions, enhancing personnel motivation, developing an operational forestry information system, and reforming education in the forestry sector. Additionally, there is an emphasis on developing the wood industry to strengthen its role in rural development, biodiversity protection, and other forest ecosystem services.

Despite facing challenges and having unmet goals from the revised strategy, at the end of 2022, the Ministry of Agriculture, Forest, and Water Management initiated the development of a new strategy. In November 2023, a new Forest Law is being prepared, aiming to establish a legal foundation for the creation of a state enterprise for forest management. This reflects an evolving approach to forestry management in Montenegro.

Organization of the state forestry sector

The last major changes occurred in 2000, marked by the adoption of the Law on Forests and the transformation that led to the closure of the Public Company "Montenegro Forests". This resulted in the establishment of the Directorate for Forests of Montenegro (later the Directorate for Forests) and 14 forestry companies as joint-stock entities. Following initial challenges faced by the forestry companies, a Rehabilitation and Revitalization Program for Forestry and the Wood Industry was implemented in 2004. This program facilitated long-term contracts for the use of state-owned forests through concession contracts lasting 15 years. These contracts were offered to the private sector, specifically



companies that acquired former state-owned wood industry enterprises. The legal basis for these contracts originated from the Law on the Participation of the Private Sector in Performing Activities of Public Interest (a precursor to the Law on Concessions adopted in 2009).

The formalization of the concession system in the forestry sector took place with the enactment of the new Law on Forests in 2010, which remains in effect today with five concession contracts set to expire at the end of 2022. The Ministry of Agriculture, Forestry, and Water Management plays a leading role in forest resource management processes, proposing development policies to the Government of Montenegro in the fields of forestry, wood industry, and hunting. This ministry conducts economic analyses, monitors sectoral trends, aligns domestic legislation with EU regulations, and oversees policy implementation. The forestry sector within the ministry is organized into four directorates: the Directorate for Forestry, the Directorate for Wood Industry, the Directorate for Hunting, and the Directorate for Monitoring in Forestry and Hunting.

The Forestry Administration, as a state administration body, manages state-owned forests and handles professional tasks related to the management of privately owned forests, including planning, remittances, and protection. Organized into 17 regional units and a central administration headquartered in Pljevlja, it operates under the authorizations granted by law.

Socio-economic aspects

The social functions of forests in Montenegro hold great importance for society, particularly in terms of cultural sustainability through protected forest areas and management in these regions. Forests significantly contribute to rural development, evident in the establishment of new nature parks and the overall increase in protected areas in the past decade. Currently, about 15% of Montenegro is designated as protected areas, a substantial contribution to preserving natural ecosystems. The sustainability of forest management in rural areas is reflected in the population's survival and employment in activities such as tourism, forestry, wood processing, and agriculture. While historical trends saw a majority of Montenegro's population residing in forest-rich areas, contemporary patterns show a shift towards urban migration.



Despite challenges in optimizing the social functions of forests, particularly tourism and recreation, the potential for development in these aspects remains intact.

The share of forestry and wood processing in the national income is together below 1%, which is insufficient and its significant increase will be one of the biggest challenges for the relevant state forestry institutions.

The most common type of illegal activity in Montenegrin forests, after illegal logging, is the usurpation of state forests or forest land (usually for construction). In 2019, there were 6.037.50 m³ of illegally logged wood in the state forests and 436.08 m³ in private forests (Radosavljevic, 2023).

Conclusion

The key conclusion is that sustainable forest management in Montenegro lacks international projects and cooperation, particularly in the crucial areas of science, research, and operational forestry. There is a need for comprehensive approaches and solutions on a broader scale to address climate change impacts, forest fire prevention, prevention of forest drying, and monitoring forest health. Montenegro's forestry requires support in various aspects, including the creation of a forestry information system, the establishment of a suitable regulatory and planning framework for utilizing forest ecosystem services, and inclusion in IPARD measures for rural development.

Of the strategic and organizational changes being implemented in Montenegro's forestry sector during 2023, a new state forest enterprise, "Montenegro Forests" will begin to work in 2024. This represents an opportunity for the integration of the enterprise into EU practices, knowledge exchange, and monitoring of forestry policies, which is a realistic expectation.



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Law on Nature Protection ("Official Gazette of Montenegro" No. 54/16)

Law on National Parks ("Official Gazette of Montenegro" No. 28/14)

Game and Hunting Act ("Official Gazette of Montenegro", No. 52/08 i, 40/11 48/15)



ABBREVIATIONS

UNECE - United Nations Economic Commission for Europe

IPA - The Instrument for Pre-accession

PENF - Public Enterprise „National Forests“

MAFWE - Ministry of Agriculture, Forestry and Water Economy

SSO - State Statistics Office

PI - Public Institution

X. NORTH MACEDONIA

X. NORTH MACEDONIA

The Republic of North Macedonia, situated in the heart of the southern Balkan Peninsula, is a landlocked country spanning an area of 25.713 km². Approximately 38.5% of the country's land surface is covered by forest ecosystems, while agricultural land accounts for 44%. The topography is characterized by mountains and hills, encompassing about 79% of the total area. Notable are three large tectonic lakes (Ohrid, Prespa, and Doyran) and 43 small glacial lakes, with the Sharr Mountains hosting around half of them. The country boasts 35 rivers, with the Vardar River being the longest and most significant, constituting two-thirds of the territory. North Macedonia is distinguished as a biodiverse nation, hosting 28 key habitat types and exhibiting a high level of endemism among species. Protected areas encompass 8.9% of the total land area (UNECE, 2019).

Relations with the European Union

North Macedonia's application for EU membership was submitted on 22 March 2004. On 9 November 2005, the Commission issued an opinion on the application from North Macedonia for membership of the European Union and recommended that North Macedonia be granted the status of candidate country. North Macedonia was granted EU candidate status in December 2005. On 18 February 2008, the Council adopted the revised Accession Partnership with North Macedonia, which identified new and remaining priorities for action, adapted to the country's specific needs and stage of preparation.



The European Commission first recommended opening accession negotiations with North Macedonia in October 2009. In 2015 and 2016, the recommendation was made conditional on substantial progress in the implementation of the "Urgent Reform Priorities" and the continued implementation of the Przino agreement, a political agreement in which the main parties in North Macedonia made a commitment to respect democratic principles and agreed to establish a transitional period that would end in free and fair elections.

The Council adopted conclusions in June 2018 in which it agreed to respond positively to the progress made by North Macedonia, and set out the path towards opening accession negotiations in June 2019. The Council underlined the critical need for North Macedonia to continue making concrete progress on certain key areas, such as the fight against corruption, judicial reform, intelligence and security services reform and public administration reform. On 24 March 2020, ministers for European affairs gave their political agreement to the opening of accession negotiations with Albania and North Macedonia. This was formally adopted by written procedure and endorsed by members of the European Council on 26 March 2020 (European Council, 2022). The EU is North Macedonia's main trading partner, accounting for 77.5% of the country's exports and 51% of its imports. Germany is the biggest trading partner of the country, followed by Great Britain, Serbia, China and Greece. Exports from the country are centred around a few products, the most important being: ferronickel alloys, iron and steel, and textiles. The main imports are crude oil, electricity, flat-rolled iron and steel products, and vehicles. The Instrument for Pre-accession (IPA) is the main EU financing instrument to support the structural reforms in North Macedonia and the country's accession path. Since 2007, the EU invested €1.3 billion, through the national IPA envelope (Delegation of the European Union to North Macedonia, 2021).

General information on forest fund

According to data from the public enterprise "National Forests" (PENF), the Ministry of Agriculture, Forestry, and Water Economy (MAFWE), and the State Statistical Office (SSO) in the Republic of North Macedonia, the forested areas have consistently expanded over the years. To illustrate, in 1938, the total area



was 615.261 ha, whereas in 2020, it reached 1.001.067 ha (FAO FRA, 2020), marking a 63% increase. This growth can be attributed to afforestation, natural regeneration of abandoned agricultural land, and effective forestry practices in the past. Currently, forests and wooded areas constitute 39% of the country's total land area. According to data extracted from the Forest Management Plans of 2008, the overall forest growing stock is recorded at 75.939.573 m³ (91 m³/ha). In comparison, the European average stands at 163 m³/ha, highlighting that Albania, Greece and Cyprus have lower figures than North Macedonia. The total annual increment is reported as 1.616.782 m³ (1.93 m³/ha). In North Macedonia, the annual demand for fuelwood is approximately 800.000 m³. The wood industry processes about 100.000 - 120.000 m³ derived from forests. However, due to North Macedonia's shortage of industrial wood from coniferous tree species, the import of wood surpasses the domestic production. In terms of ownership, 89% of the forests are under state ownership, while 11% belong to private owners (SWG, 2023).

Review of the National Legislative Framework

The fundamental laws governing the management of forests and game include the Law on Forests, Law on Hunting, Law on Forestry and Hunting Inspection, and several associated rulebooks. Beyond these statutes, various provisions from other laws about reproductive material, plant health, rural development, fire prevention, nature conservation, environmental protection, water management, protection and rescue operations, and disease control are also applicable. A main strategic document in this context is the "Strategy for Sustainable Development of Forestry 2006-2026". Additionally, key national strategies and plans encompass areas such as sustainable development, nature preservation, biodiversity, climate change, efforts against land degradation and desertification, and spatial planning.

In 2023 the project was financed by the European Union with the overall objective of facilitating the implementation of EU-related strategies, policies and acquis to boost sustainable development of the Forestry sector in North Macedonia.



The specific objective of this project is to assist MAFWE to progress in the reforms in the forestry sector including strategic, legal, institutional and entrepreneurial frameworks, as well as the development of informational and other tools for sustainable forest management (MAFWM, 2023).

Organization of the state forestry sector

The Ministry of Agriculture, Forestry and Water Economy (MAFWE) is the most competent Governmental body and there are state advisors for forestry, the sector for forestry and hunting, the forest police department and the state forestry and hunting inspectorate. Besides those sectors, there are several sectors common for agriculture forestry and water economy. Within the Department of Forestry, there are 4 units: for management and harvesting; silviculture and afforestation; for the protection of forests from biotic and abiotic factors; and game management. The State Inspectorate of Forestry and Hunting, as a body within the MAFWE, controls and supervises the enforcement of the Law on Forests, the Law on Hunting and all other laws and legally binding acts in the field of forestry and hunting. The Forestry Police, as a sector within the MAFWE, protects the forests by the Law on Forests. The lack of human capacities is a problem. According to the ownership, forests in RSM can be state-owned or private forests (SWG, 2023).

State-owned forests are managed by entities appointed by the Government of the Republic of North Macedonia, such as the public enterprise "Makedonski sumi" a centralized enterprise on the national level with headquarters in Skopje and 30 regional offices. The model of centralized operation in practice in PE National Forests faces many problems and difficulties in functioning, and new Law on Forests is in progress, which foresees the transformation of the Public Enterprise and monitoring of new European trends in forestry: Public Institutions for the Management of national parks: PI „NP Pelister“, PI „NP Mavrovo“, PI „NP Galichica“, PI „Shar Planina“, public Enterprise for management of multipurpose protected area „Jasen“.

To ensure the necessary coordination in the implementation of the activities of the public enterprise "Makedonski šumi", the work is carried through the Directorate and 9 sectors, which are managed by Assistant Directors.



The public enterprise "Makedonski šumi" has 30 Administration units, which are managed by Managers. The forests are divided into forest management units (more than 200), and a 10-year plan is drawn up for each forest management unit. The 10-year plan after revision is approved by the Minister of Agriculture, Forestry and Water Management. The State Inspectorate for Forestry and Hunting is responsible for control over the performed forest activities such as afforestation, cultivation, use, construction of forest roads, and protection (against diseases, pests and fires) following the management plan.

Socio-economic aspects

Forestry in the Republic of North Macedonia is the economic branch in which the gross national product, if we give value to the generally useful functions, the contribution is considerably greater (Makedonski Sumi, 2021). Besides PENF, PI NPs are self-financing companies too. What national parks have in common is that they still generate the most income from the sale of wood, except NP Galichica, which started a project with PONT and focuses on the protection and conservation of nature. On the other hand, PE National forests derive almost all of their income from wood products (>95% of income).

The public enterprise "National Forests" employs a total of 2,200 employees. According to official statistics, about 7,000 people are directly employed in forestry and the forest industry sector. Indirectly, the sector provides job opportunities (part-time jobs) to an additional 35,000 - 40,000 people through multiplier effects (SWG, 2023).

Conclusion

A comprehensive approach is needed to enhance the forestry sector, both in response to national requirements and international obligations. This involves refining existing legislation and formulating new by-laws. The implementation of a robust forest inventory and information system is essential for informed decision-making.



Additionally, there is a critical need to bolster cross-sectoral communication, underscored by the development of a communication plan. Improving the public perception and understanding of the vital role of forestry is paramount. Furthermore, advancing forest management planning and engineering practices is imperative.

To further expand EUSTAFOR's mission and involve a greater number of organizations in its membership, in the case of North Macedonia, EUSTAFOR should establish contact with the Public Enterprise "Makedonski šumi," which is the responsible entity for managing state forests. Given North Macedonia's commitment to EU integration processes, it is expected that the enterprise will recognize the benefits of membership and establish cooperation with other EUSTAFOR members.

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Legislation framework:

Law on water ("Official Gazette of RSM" no 87/08 and amendments) - related to forest activities in erosive areas

Law on Reproductive material from forest tree species (Official Gazette of RSM no. 55/2007 and 148/11)

Law on Plant Health ("Official Gazette of RSM" no. 29/05; 81/08; 20/09; 57/10; 17/11 and 148/2011)

Law on Forestry and Hunting Inspection (Official Gazette of RSM No. 88/2008, 6/10, 36/11 and 74/12)

Law on Agriculture and Rural Development (Official Gazette of RSM no 49/10; 53/11, 126/12, 15/13)

Law on hunting ("Official Gazette of RSM" no. 26/09, 82/09, 136/11, 1/12, 69/13, 164/13 and 187/13)

Law on Forests ("Official Gazette of RSM" no. 64/09, 24/11, 53/11, 25/13, 79/13, 147/13 and 43/14)

Law on nature protection ("Official Gazette of RSM" no. 67/04, 14/06, 84/07, 47/11, 148/11, 163/13, 63/16)

Law on environment protection ("Official Gazette of RSM" no 53/05, 81/05, 24/07, 159/08, 83/09, 48/10, 124/10, 51/11, 123/12, 93/13, 187/13, 42/14, 44/15, 129/15, 192/15, 39/16)

Firefighting Act ("Official Gazette of RSM" no.67/04, 168/17 - consolidated text)

Rulebook for preparation of forest management plans (Rulebook on the content of special plans for the management of forests with economic and protective purposes, as well as the method of their preparation, adoption and approval, the content of special plans for the silviculture and protection of forests in protected areas, the method of their preparation, adoption and approval and content of the special plan for the management of forests in private ownership over 30 ha, the method of their preparation, adoption and approval (Official Gazette of RSM" no. 248/19)



ABBREVIATIONS

EU - European Union

FAO - Food and Agriculture Organization of the United Nations

FSC - Forest Stewardship Council

GDF - General Directorate of Forestry

OGM - General Directorate of Forestry (in Turkish: Orman Genel Müdürlüğü)

UNECE - United Nations Economic Commission for Europe

WFP - World Food Programme

WBG - World Bank Group

XI. TURKEY

XI. TURKEY

Turkey is part of both Europe and Asia, with Thrace in the northwest belonging to Europe and Anatolia to Asia. It sits in the Northern Hemisphere between latitudes 36 and 42 and East longitudes 26 and 45, covering a total land area of approximately 78 million ha. With an 8,333 km coastline along the Black Sea, the Sea of Marmara, the Aegean, and the Mediterranean, Turkey shares borders with Greece, Bulgaria, Georgia, Armenia, Azerbaijan, Iran, Iraq, and Syria, totalling 2,753 km. The 2007 Census reported a population of about 73.9 million people. The coastal zone spans 8,333 km, encompassing the Black Sea, the Sea of Marmara, the Aegean Sea, the Mediterranean Sea, and the Bosphorus and Dardanelles passages. The topography is generally rugged and steep (FAO, 2015).

Türkiye holds the 54th position out of 189 countries in the 2020 Human Development Index, categorizing it as an upper-middle-income nation. Its strategic geographic location and robust economy establish it as a significant player on both regional and global scales. With an average annual economic growth of 5% since 2000, Türkiye has successfully eliminated extreme poverty. Despite implementing various programs to address different aspects of poverty, challenges persist, particularly for the most vulnerable groups, including Turkish citizens, migrants, and refugees. Since 2015, Türkiye has become the host to the world's largest refugee population, accommodating 3.8 million Syrians, half of whom are children, and nearly 320,000 individuals under international protection (WFP, 2022).



The natural vegetation in Turkey is closely linked to its relief, climate, and soils. There are two main types: steppe grasslands, found mainly in central Anatolia and the southeast but also in lowland Thrace, and the valleys and basins of eastern Anatolia; and forest and woodland, covering the rest of the country. However, human activities, such as lumbering, agriculture, and grazing, have significantly altered these natural vegetation types.

In the central and western Taurus range, Mediterranean mountain forests are common, dominated by pine, fir, oak, cedar, beech, juniper, and maple. Along the Aegean and Mediterranean coasts, there is a belt of Mediterranean lowland vegetation known as the maquis type, featuring myrtle, wild olive, laurel, carob, and occasional stands of oak, pine, and cypress.

General information on forest fund

Turkey has 22.34 million ha of forest or 28.6% of the land area. Forests are 99.9% owned by the State. The forest area has increased by 2.14 million ha since 1973 due to afforestation and forest in-growth on abandoned lands. The definition of forest in Turkey, which is at variance with the FAO definition, results in the area of private forest being significantly understated. The average annual increment of 2.05 m³ per ha compares with a European (excluding Russia Federation) average of 5.4 m³ per ha. The annual allowable cut (AAC) is 18 - 20 million m³ or approximately 44% of the increment. This compares with a European Union average of 73% for feelings as a percentage of increment. In Turkey, extraordinary allowable cuts including additional fellings e.g., windblow, fire, and disease typically average 4-5 million m³ (WBG, 2017).

The overall wood volume in these forests is 1.6 billion m³, with an annual increment of 45.9 million m³. In 2015, total timber production reached 21.635.000 m³, including 5.000.000 m³ for fuel wood. The General Directorate of Forestry (GDF) oversees all forest lands, excluding farmland plantation forests. Approximately 200.000 ha of farmland plantation forests, owned privately, are managed as farmland without GDF supervision, except for specific cases like research projects and consultancy services for forest extension.



Analysis of National Legislative Framework

The general policy in Turkey is defined by the Ministry of Development through the National Development Plan. The main policy documents are the Tenth Development Plan (2014-2018), the National Forestry Program (2004- 2023), the Strategic Plan of the Ministry of Forestry and Water Affairs (2013-2017) and the General Directorate of Forestry's Strategic Plan (2013- 2017). The Ministry of Forestry and Water Affairs (MFWA) is responsible for the preparation of plans for combating desertification and erosion and carrying out activities concerning protected areas, national parks and hunting. The General Directorate of Forestry (GDF), within the MFWA, is responsible for the integration of the policy and supervision of the implementation. The GDF's strategic plan sets out the overall vision and four main objectives i.e. (1) protect the forests and biodiversity against biotic and abiotic pests, (2) develop and expand the existing forests, increase their efficiency, (3) meet the developing and changing expectations of the public for the forest goods and services and (4) ensure the institutional development for providing sustainable forest management. Overall the policy and strategy are well-defined, and there are procedures in place to monitor performance. The strategic planning process has opportunities for stakeholder participation (WBG, 2017).

The Forest Law, enacted in 1956, covers a broad range of topics including forest definition, categories, management, protection, development of forest villages, fire prevention, in-forest pastures, and penalties. However, it lacks provisions on harvesting non wood forest products (NWFPs), rights to NWFPs, and specifics regarding the national forest inventory and sustainable forest management. The Constitution, particularly Article 169, plays a significant role in forestry law by asserting state control over all forests, prohibiting the transfer of ownership of state forests, and restricting reductions in forest borders except in special circumstances. The General Directorate of Forestry (GDF) enforces the Forest Law and can seek assistance from various law enforcement bodies.

Despite several amendments, the main forest legislation, established over 50 years ago, has deficiencies including inconsistent text due to repeated changes, a forest definition not aligning with FAO standards, limited attention to the private sector, insufficient consideration for NWFPs, and conflicts with other legislation.



Areas for improvement include incorporating sustainable forest management (SFM), establishing user rights for NWFPs, defining methods for selling wood-based forest products, and supporting sector initiatives. Additionally, there is a need for framework legislation on nature protection, a national biodiversity strategy, and an action plan, with the draft Nature Protection Law currently not aligning with the EU acquis.

Management plans for national forests were initially completed between 1963 and 1972, with periodic updates since then. While earlier plans prioritized wood production, current ones strike a balance between ecological, economic, social, and cultural aspects. The General Directorate of Forestry (GDF) oversees management planning through its chief engineer's offices, ensuring a well-documented process with opportunities for public input. Turkey lacks a National Forest Inventory (NFI) and instead relies on information amalgamated from management plans for national-level data on forest resources. A pilot NFI project in 2009 focused on inventory design and methodology, serving as a potential starting point for future NFIs. Accurate and timely information is crucial for national forest policy, planning, and international reporting commitments.

Organization of the state forestry sector

The GDF is the main institution in the sector and is established as a corporate body with responsibility for almost all sustainable forest management activities. It is a large organization employing 39,028 staff in 2016 and is organized along classic forestry lines with a headquarters comprising service, consultative/supervisory and auxiliary units and Regional Directorates (28) and Research Institutes (12) all reporting to the headquarters. Under the Regional Directorates, there are Management Directorates (245) and below these Offices of Forest Management Chiefs (1,419) and Offices (156) dealing with forestation and soil preservation and Offices (310) of other types of chiefs. The MFWA also includes the General Directorate of Combating Desertification and Erosion (GDCDE), the General Directorate of Nature Conservation and National Parks (GDNCNP), the General Directorate of Water Management (GDWM) and the General Directorate of Meteorology (GDM).



The GDCDE works mainly in forestry-related fields and supports the sustainable development, expansion of forests and rehabilitation of degraded forests and other lands throughout the country. It has no budget for remedial works apart from specific projects financed by exceptional sources other than MFWA. Thus the rehabilitation of degraded forest lands and other remedial works are paid for and implemented by the GDF (WBG, 2017).

Over 99% of forest areas in Turkey are state-owned, with the remaining fraction under private and public ownership, excluding farmland. Most public and private forests are concentrated in the Marmara and Aegean regions. Public forests are usually not managed for commercial timber harvesting purposes, as the areas are small and degraded (Preferred by Nature, 2018).

As of the end of 2014, 2.4 million ha of forest have Forest Stewardship Council (FSC) certification, with plans to expand to 5 million ha by the end of 2019. While there is no national forest standard for FSC or PEFC, the General Directorate of Forestry (GDF) collaborates with the Turkish national standard authority to develop a PEFC standard for Turkey.

Socio-economic aspects

The General Directorate of Forestry (GDF) is the primary roundwood producer, annually selling 18-21 million m³. Villagers receive a discounted price for 36% of fuelwood and 0.5% of industrial wood. GDF sells roundwood through auctions, standing sales (20%), guaranteed supply contracts to enterprises with 25,000 m³ or more annual intake, and allocated sales to fibre-chipchip (30-35%) and paper sectors. The private sector, producing around 3.5 million m³, focuses on pulp wood for the wood panels sector. Forest villagers conduct 95% of harvesting operations in GDF forests, a legal obligation to offer this work to villages, using basic technology. Harvesting costs are comparatively high due to technology and methods, with no developed contracting infrastructure or plans for one.

Although 28% of Turkey's land is covered by forests, the income from forest products contributes only 0.003% to the government treasury. Despite being classified as an emerging market economy, the country experienced a 4.5% GDP growth in the first quarter of 2020.



The agricultural sector grew by 3%, the industrial sector by 6.2%, and the services sector (including construction) by 3.2%. However, the growth in demand for forest products falls short of meeting the needs of the forest industry. To address this gap, there is a crucial emphasis on the industrial plantation movement. Fast-growing domestic and foreign species are planted in these areas to meet the increasing demand for forest products. Despite an increase in production, forest product prices remain tied to the Turkish Lira, experiencing a 15% rise from 2019 to 2020. While the consumed round wood amount is nearly 30 million m³, the proportion of imported wood has decreased, with domestic supplies now meeting most of the sector's demands. The General Directorate of Forestry (OGM) has obtained Forest Stewardship Council (FSC) certification for 6 million ha, covering 22% of Turkey's forest area (UNECE, 2020).

Of the 20 million Turkish people living in rural areas, about 7.1 million live in approximately 17,000 forest villages. The main source of income for those people comes from the jobs created within forest harvesting, silvicultural practices, afforestation and collection of non-wood forest products etc. Those people constitute an essential source of forest labour in harvesting, transportation, afforestation and protection. The number of forest villages in Turkey is 21,218. The population living in these villages is about 7.5 million, which comprises 12% of the total population, and 47% of the population living in villages. Forest villages constitute one of the poorest classes of the population and their incomes depend heavily on forests (Kuvan, 2011).

People mainly earn their living from jobs related to forest activities, such as harvesting, planting trees, and collecting non-wood forest products. The country's forestry agencies provide employment opportunities and meet some wood and non-wood needs of forest villagers. Forest harvesting, undertaken by forest villagers, constitutes 95% of operations in GDF forests, as legally mandated to offer this work to villagers. Basic technology, like manual felling and tractors for extraction, is used, and local prices are set based on tree size, slope, and distance (Preferred by Nature, 2018).

Illegal logging activities in Turkey involve removing plant-based materials, smuggling timber, unauthorized tree cutting, extensive clear-cutting, harvesting without a licence, excessive residue collection, transporting wood without a permit, and encroaching on forestland.



Forest encroachment, the illegal occupation of forestlands, is the second most significant cause of illegal forest clearance. Various illegal activities, such as tree cutting, grazing within forests, converting forestlands for residential development, and clearing for agriculture, are visible in Turkey. However, there is no apparent illegal timber trade. According to current statistics about 20,000 m³ are illegally harvested annually, mainly fuelwood at a local level (WBG, 2.7).

Conclusion

Membership in EUSTAFOR (European State Forest Association) holds significant potential for the General Directorate of Forestry (GDF). Through joining, GDF stands to gain valuable insights by sharing experiences, knowledge, and best practices with fellow state forest organizations across Europe. Moreover, EUSTAFOR membership will facilitate networking opportunities, fostering collaboration and partnerships with other European state forest organizations. This engagement with EUSTAFOR can play a crucial role in driving continuous improvement for GDF, aligning its practices with European standards and enhancing collaboration to address common challenges within the forestry sector.

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Legislation framework:

Forest Law Nr. 6831 (Official Gazette Date/Nr.: Mar 16th 2007 / 26464)

Forestry Law No 3116 and LNoNo's 4785, 5653 and 5658 amending this law

Environmental Law Nr. 2872

National Parks law Nr. 2873

National Afforestation and Erosion Control Law Nr. 4122

Hunting Law Nr. 4915

Soil Protection and Land Use Law Nr. 5403

Protection of Cultural and National Heritage Law Nr. 2863

Law Amending and Adopting Decree Law No 3234 on the Organization and Tasks of the Forestry General Directorate

Cadastral Law Nr. 3402 Amended by Law Nr. 5304 (official gazette 17th June 1987 / 1952)

Law No 645 on the Organization and Tasks of the Ministry Of Forestry And Hydraulic Works

Village Law: Law Number: 442, accepted date: 18/3/1924, official gazette: 7/4/1924, volume:5, issue: 68

Mining Law: Law Number: 3213, published official gazette: Date: 15/6/1985, issue: 18785,

Rangeland Law Nr. 4342

Law on Water Nr. 831

Law on Village Drinking Water Nr. 7478

Forest Engineering, Forest Industry Engineering and Woodworking Industry Engineering, Nr. 5531 (Official gazette: 8/07/2006, issue 26222)



XII. CONCLUSIONS AND RECOMMENDATIONS



XI. CONCLUSIONS AND RECOMMENDATIONS

EUSTAFOR represents state forest companies, enterprises and agencies which have sustainable forest management as a major concern. The goal of EUSTAFOR is to promote the common interest of state forests in the EU in the scope of their sustainable development. The association supports and strengthens state forest organisations in Europe to maintain and enhance economically viable, socially beneficial, culturally valuable and ecologically responsible sustainable forest management. The main EUSTAFOR objectives are: to analyse and investigate the existing framework conditions within the EU, to create the preconditions for sustainable management of state forests; to facilitate and expand an exchange of ideas and contacts between the state forest organisations of Europe; to keep its members regularly informed on topics and issues that concern the whole of Europe.

Through the analysis of the forestry sectors in Albania, Belarus, Bosnia and Herzegovina, Georgia, Cyprus, Montenegro, North Macedonia, Turkey, and Moldova, several significant aspects have been highlighted that need to be considered when establishing future collaboration and expanding EUSTAFOR membership:

- **Diverse Approaches to Forest Management:** each country exhibits a unique approach to forest management, shaped by its geographical and environmental conditions; variations exist in their priorities, including forest preservation, sustainable resource utilization, and alignment with EU integration goals; differences emerge in the significance attributed to clear regulations, protection against diverse threats, and the sustainable exploitation of forest resources and distinct emphases are placed on sustainable forest development, marked by specific targets related to expanding forest cover, timber harvesting, and wildlife population enhancement.
- **Policy Frameworks:** all countries have established comprehensive policy frameworks and legal documents to guide forest management and conservation endeavours, seeking a harmonious balance among economic, ecological, and social aspects of forest stewardship.



- **EU Integration:** several countries actively pursue EU membership, with forest management strategies aligning closely with EU standards; others incorporate EU regulations and standards into their forest policies, underscoring their commitment to international cooperation in forestry and environmental conservation.
- **Sustainable Forest Management:** the pursuit of sustainable forest management stands as a shared objective across all countries. This entails the responsible management of forests for ecological well-being, timber production, recreation, and biodiversity conservation. The focus is on ensuring that forests continue to provide benefits to both current and future generations.
- **Challenges and Threats:** the region faces significant challenges, including illegal logging, forest fires, and resource constraints hindering proper forest management and conservation; addressing these challenges is imperative for achieving long-term sustainability in forest management.
- **Forest Reproduction and Regeneration:** some countries place a strong emphasis on forest reproduction and regeneration, recognizing the vital role of diverse age structures and species compositions in forest ecosystems
- **International Commitments:** all countries acknowledge their international commitments, encompassing agreements related to biodiversity conservation and sustainable forest management.
- **EUTR/EUDR Compliance:** further actions are needed in all countries to ensure compliance with EUDR regulations, guaranteeing that timber and timber products meet legal and sustainability requirements.

All countries underscore the paramount importance of sustainable forest management and have crafted policies and strategies to advance this overarching goal. While common threads weave through their approaches, each country tailors its forest management practices to its unique circumstances. Continued efforts to address challenges, enhance sustainable practices, and fulfil international commitments are essential for the long-term health and resilience of forests in these nations.



Membership in the European State Forest Association (EUSTAFOR) is typically extended to European countries that possess significant state-owned forest areas and a strong dedication to sustainable forest management. Based on the analysis of the countries reviewed, it is reasonable to consider their institutions as potential candidates for EUSTAFOR membership, provided their home countries meet the organization's specific criteria. These criteria encompass several key factors, including:

1. Extent of State-Owned Forests: An essential criterion is the presence of substantial state-owned forested areas within the country.

2. Commitment to Sustainable Forest Management: EUSTAFOR places a high emphasis on sustainable forest management. Prospective members must demonstrate a resolute commitment to implementing sustainable practices and policies within their state-owned forests.

3. Legal and Regulatory Framework: Countries aspiring to join EUSTAFOR should maintain a robust legal and regulatory framework for forest management, in alignment with European standards and principles.

4. Environmental and Biodiversity Conservation: Future members must exhibit active efforts to preserve and enhance biodiversity, protect endangered species, and uphold ecosystem health within their state owned forests.

5. Transparency and Accountability: Transparency in forest management practices is crucial, encompassing aspects such as reporting on forest resources, compliance with international agreements, and accountability mechanisms.

6. Engagement in International Forest Initiatives: A commitment to active participation in international forest initiatives and a willingness to engage in regional and international collaboration on forestry matters are highly regarded.

7. Capacity for Collaboration: Prospective members should possess the capacity to collaborate effectively with other state forest management organizations in Europe and actively contribute to the objectives and activities of EUSTAFOR.

Each institution from the analyzed countries should undergo a separate evaluation of these factors to determine their eligibility for EUSTAFOR membership.



The assessment process should be comprehensive and focused on alignment with the organization's mission and values. Ultimately, admission to EUSTAFOR represents a mutual commitment to advancing sustainable forest management practices and fostering collaboration among European countries with significant state-owned forests.

| Country | Potential future member | Readiness of potential member for joining | Institution website |
|------------------------|--|---|---|
| ALBANIA | National Forestry Agency | | https://turizmi.gov.al/krijohet-agjencia-kombetare-e-pyjeve/ |
| BELARUS | Ministry of Forestry | | https://www.mlh.gov.by/en/ |
| BOSNIA AND HERZEGOVINA | RS: JP Šume Republike Srpske Federation BiH: any cantonal SFMO | | https://sumerepublikesrpske.org/ |
| CYPRUS | Ministry of Agriculture, Rural Development, and the Environment | | https://www.moa.gov.cy/moa/fd/fd.nsf/index_en/index_en?OpenDocument |
| GEORGIA | The National Forestry Agency | | https://forestry.gov.ge/En/Page/GeorgianForests |
| GREECE | The General Directorate for the Forests and the Forest Environment | | https://ypen.gov.gr/ |
| MOLDOVA | Agency Moldsilva | | https://www.moldsilva.gov.md/?l=en |
| MONTENEGRO | Future JP Šume Crne Gore | | http://www.upravazasume.me/prva.php |
| NORTH MACEDONIA | JP Makedonski Šumi | | http://www.mkdsumi.com.mk/ |
| TURKEY | General Directorate of Forestry | | https://www.ogm.gov.tr/en/organization/general-information |

The readiness of a potential member to join will be contingent upon the country's interest and its relationships with the EU.

The preparedness of a potential member for joining within the next 3 to 7 years.

The preparedness of a potential member for joining within the next 3 years.