

## Revisiting Sino-Mozambican Cooperation: China's Inroads into the Agriculture and Forestry Sectors

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*This article is a shortened version of a CCS discussion paper in preparation.*

### Introduction

Since Mozambique became an independent state in 1975, its development trajectory has been shaped by international and internal events (Alden, 2001:8). In the first decade after independence, the Government of Mozambique (GoM) implemented a Marxist-oriented programme, which did not produce the expected outcomes (Latham, 1981:69; Abrahamsson and Nilsson, 1995: 28-30). In addition, Mozambique's colonial past, governance inexperience, insufficient capital, poor infrastructure and unskilled population have limited the state's capacity to develop strong governmental institutions, a solid national economy, and a cohesive national identity. Also, the internal conflict started by the Mozambican National Resistance (Renamo) rebel movement against the Liberation Front of Mozambique government (Frelimo) lasted for sixteen years and destroyed much of the infrastructure left from the colonial period (Hall and Young, 1997: 115-137). To support a declining economic, political and social structure, the government was left with no alternative but to turn to Western states and International Financial Institutions (IFIs) for support by the mid-1980s (Manning, 2002: 55-6; Pitcher, 2002:103-114; Hanlon, 1991: 28-9; Hanlon, 1996: 16). The transition from a phase in which Mozambique had relative autonomy to one in which international organisations became deeply involved in the state's development has had innumerable implications (Ottaway, 1988: 222; Manning, 2002: 123-132).

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On the one hand, financial and technical assistance of donors and IFIs has interfered with the government's development programmes, the allocation and uses of its funds, and the objectives it has to meet (Plank, 1993: 441; Batley, 2005; Arndt et al. 2007). This has constrained the state's room for manoeuvre (Newitt, 2002: 227). On the other hand, the availability of financial resources which were almost inexistent until the mid-1980s has facilitated the promotion of patrimonial ties and the prioritisation of personal economic and political interests over national welfare.

At the beginning of the twenty-first century, the rise of China in Africa brought sub-Saharan African states into the spotlight, showed China's potential for becoming a driver of change in the development of sub-Saharan African states, and exposed a new dynamics in international affairs. The implications of China's involvement in sub-Saharan African states development have been intensively debated (Broadman, 2006; Gomes, 2007; Manji and Marks, 2007; Mawdsley, 2008; Bräutigam, 2009; 'The Chinese Are Coming' by the BBC, 2011; Oxford University China Africa Network

conference on 'Chinese Investment and African Agency', 2011).

Mozambique has also been benefiting from stronger economic and diplomatic relations with China. As China seeks to secure access to natural, mineral, agricultural and energy resources, it uses a range of development and financial assistance instruments to promote development in countries like Mozambique and to cement ties. Mozambique's choice of development partners can sustain the GoM with alternative sources of aid, trade and investment, and with increasing economic opportunities and benefits. However, Mozambique's ruling elite can also use these new external resources to pursue elite projects, to sustain clientelistic networks, and to promote self-aggrandisement. Moreover, China can create new dependency linkages or impose conditions by linking aid to trade, investments and joint ventures with Mainland China (Taylor, 2011: 51-2).

This article seeks to discuss and shed light into China's interests and impact on sectors relevant for Mozambique's development. It also seeks to examine how China's growing involvement in Mozambique's agriculture and forestry sectors collude or clash with Mozambican development policies. Finally, it seeks to analyse the role the Mozambican ruling elite plays in shaping Sino-Mozambican cooperation.

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### **Analysing China's inroads into Mozambique's economy in two sectors**

Agriculture and forestry are priority sectors in Mozambique's development policies and are key to boosting sustainable development and reducing poverty. Both cases highlight issues such as the state's capacity to enhance economic growth and economic diversification, to develop a national economy, to increase the efficiency and accountability of government institutions, and to create opportunities for social development. Often the GoM's rhetoric and policies are not consistent with what is executed in practice. The most relevant agriculture and forestry sectors policies which are meant to promote a sustainable development and growth are often relegated to the second place as the ruling elite prioritises the development of large-scale projects, neglects breaches to the law, and grants privileges to a few of its constituents. Thus, the impact of China's cooperation with Mozambique in these sectors is key to examine the advantages and disadvantages of bilateral engagements and to examine the role Chinese and Mozambican actors' play in shaping outcomes.

A brief note on data collection and analysis: The data used for each case derives from online newspaper articles, published research, official documents and policies, and reports from governmental and non-governmental bodies. The data used for each case is explanatory in nature and relies on the analysis of secondary material. The information provided by different sources was cross-checked to examine whether there were significant differences in the information published, whether any methodological issues arose from the way in which information was produced and circulated, and whether there were any issues concerning the reliability of information sources (Myers et al. 1996: 23-4; Robison, 2004: 384; Mawdsley, 2008; Bräutigam, 2009: 258-9; Bräutigam and Xiaoyang, 2009: 696-7; Bräutigam, 2010: 19).

### China's inroads into Mozambique's agriculture sector

In the late 1970s, China put a significant emphasis on agriculture reform and development, and on taking peasants out of poverty. At the same time, China aimed "to create the food security, rural stability, surplus income, and labour supply to drive broader industrial development" (Davis and Woetzel, 2011). Priorities and objectives that led to successful agricultural development in China included: agriculture policy reforms, macroeconomic reforms, pro-poor policies, multi-sectoral rural development projects, institutional capacity development, infrastructure construction, technological investment, gradual market liberalisation, credit and finance, internal market integration, micro-level smallholder programmes, and rural industrialisation (Ravallion, 2009: 307-310; Sandrey and Edinger, 2009; Fan et al. 2010: 4-6). In a few decades, China managed to ensure the nation's food security, to improve the nutrition levels of the population, and to reduce the undernourishment and poverty rates (Xiaoyun, no date).

Despite the achievements made in Chinese agriculture, China's experiment has also encountered significant shortcomings or drawbacks. The most important concern environmental degradation, soil erosion, a rise in social and economic inequalities and the continued prevalence of considerable poverty rates in rural areas (Ravallion, 2009: 306; Fan et al. 2010: 3) Furthermore, the decrease of arable land in China has increased the pressure on agricultural land. Similarly, the growing population and rising levels of agricultural imports have forced China to rethink its own food security strategy (Ekman, no date: 15-22; Sandrey and Edinger, 2009: 9). As a result, the possibility of China practicing 'overseas farming' in countries with extensive arable land has been raised. However, this possibility has at times been confused and enmeshed with China's intent to promote agricultural projects abroad, to enhance its 'Going Global' strategy and agriculture-related ventures, and to ensure its own food security (Bräutigam and Xiaoyang, 2009; Hairong and Sautman, 2010).

**“** *Since China engaged with sub-Saharan African states, agricultural cooperation has been a priority.* **”**

Since China engaged with sub-Saharan African states, agricultural cooperation has been a priority (FOCAC, 2006; FOCAC, 2010). On the one hand, the development of agricultural aid projects or partnerships generates the possibility for mutual cooperation, technology transfer and for lessons to be learnt from China's expertise (Hairong and Sautman, 2010: 320-1). At the same time, they set opportunities for Chinese agricultural companies and entrepreneurs to expand their businesses abroad (Bräutigam and Xiaoyang, 2009: 692-3; Fan et al. 2010: 10-2). On the other hand, Chinese investments in agriculture overseas raise concerns over China's potential 'land grab', when considering the wider economic and social implications of land lease for host countries, and the risk of "increasing the vulnerability of traditional subsistence farmers and smallholders" (Bräutigam and Xiaoyang, 2009: 687).

As elsewhere in sub-Saharan Africa, the increasing Sino-Mozambican agricultural cooperation has been developed according to objectives set by China at the FOCAC ministerial meetings and in China's Africa Policy (FOCAC, 2006; Anon. 2007; FOCAC, 2010). In particular, China's commitment to establishing agricultural demonstration centres, enhancing technology and knowledge transfer, financing infrastructure construction, sending technical experts, and promoting technical training programmes

in “crop seed selection, [and] farming” (Taylor, 2011: 49). Agricultural aid projects have been financed by the Chinese Government, the CADFund, and the Exim Bank of China (Sandrey and Edinger, 2009: 37-9). More specifically, China’s agricultural cooperation with Mozambique has been promoted by the following means:

- Chinese government officials and entrepreneurs have visited Mozambique and expressed their interest in promoting agricultural engagements.
- The Chinese Government and Chinese companies have been financing some agriculture projects in Mozambique.
- China has been funding the development of agricultural demonstration centres.
- China has been promoting the transfer of skills and technology and providing technical assistance.
- Chinese experts have been promoting research on new seeds varieties in Mozambique.
- China has granted agricultural machinery to Mozambique.
- Mozambique has promoted the export of agricultural products to China.

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### **China’s Impact in Mozambique’s Agriculture Sector**

Sino-Mozambican agricultural cooperation involves a combination of private initiatives and state promoted agricultural aid projects and agriculture-related partnerships. In practice, Chinese investments in Mozambique’s agriculture sector are still insignificant if compared to investments in and imports of other natural and extractive resources (Hon et al. 2010: 79). Agriculture represented 1% of Chinese FDI to Mozambique in 2007 and an estimated 12% of Mozambique’s total exports to China in 2008 (Chichava, 2010b: 3; Hon et al. 2010: 79). Nonetheless, the potential for China and Mozambique to deepen cooperation in producing cash crops that represent significant agricultural imports for China, such as soybeans, cotton or tobacco, is considerable (Sandrey and Edinger, 2009: 52). Similarly, the potential for Mozambique to draw lessons from China’s policymaking practices, agriculture and rural growth policies, farming technologies, institutional capacity building, and to benefit from Chinese investment and financial assistance is significant (Roque, 2009: 11; Sandrey and Edinger, 2009; Ravallion, 2009: 311; Fan et al. 2010: 11-2).

Considering the scale and scope of Sino-Mozambican agricultural cooperation, significant challenges still constrain the potential for Mozambique to benefit from more aid and investment from China (Ekman, no date: 38-40; Kamphuis, 2009: 9). The lack of capacity of the Mozambican state to implement policies and laws effectively, to improve governance quality, to advance institutional capacity, to articulate agricultural policies with rural development, to enhance poverty reduction and to empower smallholders has had substantial negative impact on agricultural development (Ekman, no date; Ravallion, 2009: 311; Savana, 2011b). At the economic level, the lack of much needed state support in policymaking, in infrastructure construction, in

credit provision, in improving investment conditions and in developing processing facilities, has negatively impacted on the potential of the agricultural sector and discouraged Chinese investment (Alvarenga, 2008: 66; Roque, 2009: 11; Rubinstein, 2009). Poor infrastructure and high shipping costs have been two of the factors identified by Chinese entrepreneurs not to invest in Mozambique: “companies are afraid just to make up a total loss” (Chichava, 2010b: 6).

Simultaneously, the expansion of China’s agricultural projects in Mozambique exerts some economic and social implications. In 2008, Loro Horta (somewhat polemically) suggested that China’s ‘land grab’ in the Zambeze valley would turn Mozambique into its ‘first agricultural colony’ (Horta, 2008). Despite the lack of accuracy in the news, some implications of China’s interests in developing and investing in Mozambique’s agricultural sector were disclosed (Ekman, no date: 28; Bräutigam and Xiaoyang, 2009: 696-8 and 705-6; Chichava, 2010b: 6-7). Horta’s (2008) article raised awareness of the fact that: agreements set at the government level often disregard the interests and rights of local populations; that large land leases can increase cash-crop exports to China when Mozambique still needs food assistance and depends on food imports; and that China’s agricultural interests can imply the settlement of Chinese workers in rural areas directly impacting on the livelihoods of local communities. Longer-term issues are also implicated: competition between Mozambican and Chinese producers in local markets; increase of cash-crop production at the expense of food-crop production for local consumption; abandonment of food-crop production for seasonal work in cash crops causing a gap in food-crop production; and a conflict between men and women roles in the division of labour (Bräutigam and Xiaoyang, 2009: 706).

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To conclude, Mozambique is faced with the possibility of Chinese investments bringing capital, know-how, technology and market access which can significantly impact on agriculture (Alvarenga, 2008: 67) Simultaneously, it is faced with the possibility of Chinese led agriculture projects or land leases putting the food security and livelihoods of rural communities at risk and infringing traditional land rights. Nonetheless, the evidence shows that China’s role in Mozambique’s agriculture is comparatively insignificant and that other external actors exert a more significant impact on it without the implications of their practices always being considered (Ekman, no date: 31; Franco et al. 2010; AgroNoticias, 2011).

### **China’s Inroads into Mozambique’s Forestry Sector**

China is the world’s leading importer of unprocessed forest products and exporter of processed woods, furniture and other processed wood materials. China’s wood industry grew mainly out of the manufacture of Chinese products for the Chinese and international markets. China’s economic boom in the 1990s increased its demand for wood, but the logging ban imposed in the Chuanxi Forest area in 1998 forced Chinese companies to look abroad for their supply of wood products. Hence, China turned to countries like Russia, New Zealand, Papua New Guinea, Thailand, Vietnam and Gabon to import various wood species (Xiufang and Canby, 2011).

By imposing little or no tax on imported raw logs but significant tax on processed

woods, the government promoted the import of unprocessed logs and secured the sustainability of the national logging industry. China's massive processing capacity did however create disequilibrium in the international market which also, in some less democratic countries, increased illegal logging activities. By importing logs in large quantities and with few taxes, the processing and sale of wood products to the national and international market became relatively cheap (Bossel and Norfolk, 2007; Feijó, 2010). As a result of this trend, China's wood industry reached the highest levels of import, production and export in 2009, importing 113 million m<sup>3</sup> of forest products and exporting wood products to a total value of US\$25 billion (Xiufang and Canby, 2011). Such fast dynamics have however raised concerns over the sustainability of logging activities and over the economic, social, and environmental impact of this activity in supplier countries like Mozambique (Mol, 2011).

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Even though Mozambique represents less than 1% of China's total imports of wood per annum, China is its main export partner for wood (Bossel and Norfolk, 2007). Mozambique has been exporting wood to China since at least 1997 but the real quantity and value of exports is indeterminate (Table 2).

**Table 2 Mozambique's Forest Products Exports to China, 1997-2010**

	<b>Quantity Total (m<sup>3</sup>) FAOSTAT</b> (includes round, sawn and plywood, and other wood products)	<b>Quantity Total (m<sup>3</sup>) Global Timber</b> (includes round and sawn wood)
1997	28,196	not available
1998	15,709	14,000
1999	38,137	33,000
2000	76,214	33,000
2001	65,541	45,000
2002	79,685	70,000
2003	70,195	81,000
2004	70,155	81,000
2005	331,065	111,000
2006	34,563	130,000
2007	13,188	219,000
2008	70,294	197,000
2009	79,425	155,000
2010	not available	219,000

Source: FAOSTAT Forestry (2011); Global Timber (2011)

Various practices are endorsed by both Chinese and Mozambican actors which undermine the potential of the forestry sector in Mozambique. In 2007, China's Forestry Administration and the Chinese Ministry of Commerce issued the Guidelines for Sustainable Forest Management by Chinese Companies Operating Outside China, which have reportedly had a positive impact on Chinese activity in countries like Cameroon, but despite efforts to improve Chinese logging activity abroad the practices of Chinese operators in Mozambique are below the legal requirements (Ceruti et al. 2011). Infringements in the forestry sector are not one-sided; Mozambican elites also contribute to the deterioration of conditions for logging activity (Chichava, 2010a: 344-6). In 2006, Catherine Mackenzie's report exposed illegal logging activities carried out by Chinese and Mozambicans in Zambezia province, which has increased significantly. Involvement extends throughout the sector: from simple licence holders to industrial forestry concession holders, from timber buyers to export companies, and includes village leaders, local wood loggers, truck owners, shipping companies, government authorities, customs officers and the police (Mackenzie, 2006: 13-9).

**“Government officials’ involvement in corrupt practices in the timber industry makes the government’s rhetoric significantly distinct from the reality.”**

Mackenzie (2006) shows that a patron-client relation is often established between Chinese financiers and small operators. Whilst the former often end up controlling the commodity chain, the latter often become entrapped into debt and have to secure logs supply to Chinese traders to repay their debts. Small operators use the underpaid workforce in local communities to cut and transport the logs to the ports. They pay bribes to provincial authorities for the acquisition of simple licences, but also to forest officers, village leaders and checkpoint controllers, police and customs officers to under-report and under-invoice over-cutting, mislabel tree species and facilitate the transport of logs from the forests to the ports. On a larger scale, forest concession holders are national investors. They are politically related to Frelimo, therefore to local and provincial government authorities which, in partnership with Chinese operators, harvest and export mostly unprocessed logs to China. At this level, circumventing the law becomes easier.

Government officials’ involvement in corrupt practices in the timber industry makes the government’s rhetoric significantly distinct from the reality. From the information collected, Mackenzie observes that in 2003 the largest timber export companies in Quelimane were all Chinese: Madeiras Alman, Green Timber, Peter Yu, Timberworld (Chen Kee Meng). Many had local partners connected to the Frelimo party and the Chissano family. As a result of various stakeholders’ involvement in the forestry sector and of widespread illegal logging activity, Mackenzie (2006: 17) demonstrates that: a) Chinese timber buyers and operators “have no interest in the sustainable development of the sector” – when the conditions are no longer favourable they will move to other countries; and b) forestry governance laws are often not applied by Mozambican authorities. The political elites put into “direct conflict public responsibilities and private interests” (Mackenzie, 2006: vi). Rather than seeking to move Mozambique up in the value chain, to obtain income from the processing and

export of processed wood, and to create jobs, the government and Mozambican operators are promoting corrupt practices<sup>1</sup>.

The impact of Mackenzie's report on the Mozambican media, NGOs, and civil society was significant and led to an unofficial national campaign against illegal logging. Criticisms have been widely expressed in the civil-society weblog *Diário de um Sociólogo* about the illegal practices (Feijó, 2010). The concerns expressed in civil society resulted in the writing of two open letters to Mozambique's president by the academic Carlos Serra and the journalist Marcelo Mosse and the composition of the lyrics for a song about China's illegal extraction of timber by the writer Mia Couto (Feijó, 2010: 6-7). The NGO *Justiça Ambiental* and the movement *Amigos da Floresta* have since 2007 researched and discussed the environmental, social and economic impact of illegal logging activity in the central and northern regions of Mozambique, and have examined how these directly relate to governance issues.

**“ The overall appraisal, the environmental and social impact, of forest management, processing and export remain poor. Sustainable forest management plans are not implemented. ”**

In 2007, a report published by Bossel and Norfolk drew attention to the practices in the province of Cabo Delgado. As with the cases in Zambezia province, Chinese operators are involved in financing and buying timber from simple licence holders. Chinese transport companies, for instance Mogid, Mico and Heyne, and shipping companies are involved in transporting timber to the ports and exporting it to China. Of nine companies with approved forest concession licences in 2006, at least one was Chinese, Mofid, and the others export most of the timber harvested to China. From 2000 to 2005, 85% of the timber harvested in Cabo Delgado had China as its final destination. The overall appraisal, the environmental and social impact, of forest management, processing and export remain poor. Sustainable forest management plans are not implemented. Bribery and corruption facilitate illegal logging which represents significant financial losses to the economy and the state. Deforestation is increasing the negative impact on local livelihoods and on the environment.

The Mozambican media has also investigated and exposed illegal logging activities.

- In February 2007, Mozambican newspapers reported that 50 timber containers were held in the port of Pemba, Cabo Delgado, which belonged to the Chinese company Mofid. A fine of 276,745 Meticaís (approximately US\$10,482) was applied and the wood was stored to be re-sold in public auction (Noticias Lusófonas, 2007). In 2004, Mofid had already been found guilty of fraud for issuing false documents (Noticias Lusófonas, 2007).
- In September 2007, in the province of Nampula, the port of Nacala director and two customs officers were suspended for involvement in the falsification of forged export permits for unprocessed logs (Noticias, 2007b).
- In November 2007, an investigation enhanced by a multi-disciplinary team found that Aristides Muhate, Director of the Forestry and Wildlife Department in Nampula and son of the Minister of Agriculture, was involved in facilitating business with Chinese companies involved in the illegal export of timber to China. Muhate was forced to leave his post but no charges were made against him (Wamphula Fax, 2007).



- In December 2007, 543 timber containers were held at Nacala for the attempt to export unprocessed logs illegally. Eight Chinese companies were found guilty, the China HK Development Group among them, and a fine of 13,503,240 Meticaís (approximately US\$511,486) was issued (Noticias, 2007c).
- In October 2008, 53 timber containers with 5,400 round logs were held in the port of Mocimboa da Praia, Cabo Delgado, for the illegal export of unprocessed wood. The containers belonged to the Chinese companies MT International and Alman, who were charged with a fine of 486 million Meticaís (US\$1.8 million) (Araujo, 2008).
- In July 2011, 561 timber containers were held at Nacala with round wood logs of unprocessed pau-preto, pau-rosa, and sandalo. The containers belonged to Chinese companies: Casa Bonita International, Zheng Long International, Mozambique Trading Ltd, Yizhou, Tong Fa Ltd, Chanate Ltd, Senyu and Verdura Ltd. As a result, the Regional Customs Director of Nacala was dismissed, but no other sanctions were applied (Savana, 2011a).

In sum, the forestry sector has raised numerous issues; from compliance with forest law to environmental concerns, sustainable extraction of logs, and the development of wood processing industry. Furthermore, despite the media, local groups and NGOs disclosing cases of non-transparent logging activity, illegal timber export, and detention of timber containers at Mozambican ports, it is not always clear that companies that infringe the law pay the fines and no major follow ups are made by the government. The measures taken to contravene illegal logging are superficial and have no major consequences for the perpetrators.

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### **Conclusion**

In the recent decades, the GoM has adopted policies to develop the agriculture and forestry sectors. Traditional donors have disbursed substantial sums of aid, provided technical advice and imposed conditions in the attempt to enhance development. In both cases it was observed that policies still need to be effectively implemented for real progress to be made.

More recently, Mozambique has had the opportunity of benefiting from Chinese aid, trade and investment. Agriculture and forestry are two areas in which China has become increasingly involved. In the case of agriculture, China's aid and investment offer a practical approach to agricultural development. China's assistance has focused on: promoting technology and knowledge transfer through the agricultural demonstration centres it builds, increasing cereal production by researching and testing new seed varieties, and expanding Mozambique's processing capacity and infrastructure. The current pattern of Chinese involvement could promote mechanisms to combat poverty and enhance development but the overall level of Chinese investment in agriculture is still insignificant. Notwithstanding, whether China does or does not increase its agricultural investments, the GoM is liable for determining and

enforcing national policies and for relegating personal interests to the bottom of its priorities. In the case of forestry, logging is largely beyond the control of state authority. The weak state apparatus enables Mozambican economic and political elites alongside Chinese entrepreneurs to participate illegally in this activity and to benefit from it. This is possibly the most problematic issue of Sino-Mozambican cooperation. The differences between the laws, regulations, strategies and development objectives set by the GoM and what occurs in practice are evident. The GoM does little to prevent its elites at the national and local level, as well as Chinese operators, from appropriating state resources illegally. The interests of government officials involved in the timber industry clash directly with their official obligations and with government policies and strategies. Government controls become ineffective as a result of personal interests and corruption subverting the state machinery. On the whole, Mozambique's weak forest governance, the weak performance of political and institutional actors, the lack of strategic thinking in promoting sustainable forestry management, in developing the processing industry, creating jobs and extending social welfare, negatively impact on development. Forestry sector policies are subverted by China's policies, by Chinese operators' modus operandi, by the personal interests of Mozambican elites and by petty corruption promoted by local government officials.

To conclude, asymmetries in bilateral cooperation show that relations do not challenge inefficient and corrupt government structures. China exerts very limited interference in the internal affairs of Mozambique and the ruling elite sustains a form of governance that both undermines the rule of law and disregards means to increase national cohesion and state legitimacy. The GoM undertakes businesses that do not directly benefit local communities or allow them to participate in negotiations. This provides ruling elites with the means to sustain patron-client networks; it maintains the exploration of the few natural resources but often diverts revenue away from socio-economic reinvestment.

## End Notes

<sup>1</sup> In 2009, Mackenzie's 2006 report was revised. In the new report, Mackenzie and Ribeiro (2009) observe no improvements in any of the key areas for sustainable management of forest resources and development of the processing industry. They note that the number of simple licences issued decreased from 863 in 2004 to 113 in 2007, but illegal licensing increased and unlicensed logging and overcutting remain common practices. The number of forest concession contracts has increased from 2 in 2004 to 32 in 2008 and the quality of concession management plans remains poor. The cutting cycle plans are too short and reforestation plans are poorly implemented. From 2001 to 2007, only 25 nurseries were created to grow native species covering an estimated area of 123 hectares. Records with cumulative and geographically referenced information of species and volumes cut are not systematically reported. There is a relative increase in the number of checkpoints, however the number of staff has decreased and more checkpoints do not translate as more law enforcement but as further rent-seeking behaviour. The existent sawmills have not been upgraded and continue to produce only rough sawn planks. On the whole, "corruption, arrogance and mismanagement continue and are seriously undermining the rule of law, accountability of government and future of the forest sector" (Mackenzie and Ribeiro, 2009: 27).

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