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Options for sustainable business incubation that serve Cameroon's community forests

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About the project

For more information about this report, or the CoNGOs: NGOs collaborating for equitable and sustainable community livelihoods in Congo Basin forests project, visit https://www.iied.org/congos-ngos-collaborating-for-equitable-sustainable-community-livelihoods-congo-basin-forests, or contact: Duncan Macqueen, duncan.macqueen@iied.org

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Contents

List of figures and tables

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Acronyms

AFD	French Development Agency
AFR100	African Forest Landscape Restoration Initiative
ANAFOR	National Agency of Forest Regeneration
ASFOKA	Association of Community Forests of Kadey
CAE	Annual exploitation certificate
CAFT	Agroforestry Cooperative of the Tri-National
CBP	DFID's Capacity Building Project
CCIMA	Chamber of Commerce, of Industry, Mines and Crafts
CED	Center for Environment and Development
CF	Community forests/forestry
CF-BIM	CF business-incubation mechanisms
CIGs	Common initiative groups
COFIDES	Spanish Development Finance Corporation
CSOs	Civil society organisations
CSR	Corporate social responsibility
DFID	UK Department for International Development
ENSPT	Advanced School of Post and Telecommunications
ESIA	Environmental and social impact assessment
EU	European Union
FCFA	Central African franc
FESP	Forest and Environment Sector Programme
FFPOs	Forest and farm producer organisations
FLEGT	European Union's Forest Law Enforcement Governance and Trade facility
FMA	Final management agreement
FUGIRFOC	Federation of the Union of Common Initiative Groups and Community Forests of Haut Nyong
GDA	Green Development Advocates
GIZ	German Society for International Cooperation
GTZ	German Technical Cooperation Agency
ICRAF	World Agroforestry Centre
INADES	African Institute for Economic and Social Development
MA&D	Market analysis and development
MINADER	Ministry of Agriculture and Rural Development
MINAT	Ministry of Territorial Administration
MINEPAT	Ministry of Economy, Planning and Regional Development

MINEPDED	Ministry of Environment, Nature Protection and Sustainable Development
MINEF	Former Ministry of Forests and Environment
MINFI	Ministry of Finance
MINFOF	Ministry of Forests and Wildlife
MINPMEESA	Ministry of Small and Medium-sized Enterprises, Social Economy and Handicrafts
MINPOSTEL	Ministry of Post and Telecommunications
NGOs	Non-governmental organisations
NPFE	Non-permanent forest estate
NSGE	National strategy for growth and employment
NTFP	Non-timber forest product
OHADA	Organisation for the Harmonisation of Corporate Law in Africa
PES	Payments for ecosystem services
PFE	Permanent forest estate
RA	Rainforest Alliance
RDSS	Rural development sector strategy
REDD+	Reducing emissions from deforestation and forest degradation, and foster conservation, sustainable management of forests, and enhancement of forest carbon stocks
RFC	Community Forest Network
RIGC	Community-based Management of Forest and Wildlife Resources support programme
SAILD	Support Service for Local Development Initiatives
SDDL	Support for Sustainable Development in Lomié project
SMP	Simple management plan
SNV	Netherlands Development Organisation
TFFC	Tropical Forest Food and Cosmetics
TFP	Technical and financial partner
TFRD	Tropical Forest and Rural Development
USFS	United States Forest Service
VNTFP	Vegetal non-timber forest products
WWF	World Wide Fund for Nature

Summary

This report explores options for sustainable forest-business incubation in Cameroon. Forest-business incubation is a support process that accelerates the successful development of sustainable businesses in forest landscapes. A business incubator is an organisation that provides such a support process. Forest business incubators generally serve the needs of promising early-stage businesses which might lack premises, facilities, market information, technological knowledge, business-management experience, procedures, finance and legitimacy. Delivering business incubation in remote forest landscapes in a country such as Cameroon is challenging because of low densities of educated entrepreneurs, high logistical costs, scarce infrastructure, and few capable business mentors. Moreover, the links that are vital for a business to grow and flourish are hard to come by (for example, links to legal authorities, finance or insurance, research and development).

Cameroon's humid high forest covers 21 million hectares or 45 per cent of the total land area and is home to many communities of different ethnicities. Cameroon's 1994 Forest Law was the first in Central Africa to promote community forestry (CF). However, there are evident challenges to making CF work as a business – since CF businesses have an estimated total annual turnover of approximately US$2 million, as opposed to US$106 million annual turnover for largely informal individual chainsaw milling. Evidence suggests that positive outcomes for CF largely hinge on the extent to which the community can generate direct economic benefits from forest use (and are thereby incentivised to manage the forest). Without sufficient income, communities may revert to less formal means of generating income.

Assessing options for forest-business incubation in Cameroon requires recognition of three main socio-eco-geographical clusters: the densely settled Sudano-Sahel and highland savannahs, the less densely settled highland plateaus, and the sparsely populated high forests (including single-rainfall maximum coastal forests, double-rainfall maxima lowland forest and single/double-rainfall maxima lowland forest). These latter high forest landscapes are where forest resources are richest, and where conflict between communities and large industrial companies occurs most frequently. Illegal forest conversion happens both due to the expanding needs for subsistence food production from growing rural communities, and from short-term resource mining by industrial companies. Illegality is exacerbated by the excessive bureaucratic steps that have to be undertaken to register a legal CF business – and the fact that the current forest legislation restricts CFs to 5,000ha and defines CF institutions as non-profit, which restricts their prospects under the commercial Organisation for the Harmonisation of Corporate Law in Africa (Organisation pour l'harmonisation en Afrique du droit des affaires or OHADA) Uniform Act of 1997.[1]

Forest-business incubation in Cameroon has to cope with the multiple steps involved in developing a simple management plan (SMP) – which are anything but simple. Steps involve the notification of community sensitisation, creating a legal entity, the notification of consultation meetings, forest delimitation and reservation, developing a simplified management plan; procuring an annual exploitation certificate (CAE), a transportation authorisation, and a lumberyard pass (all from the Central Forestry Administration in Yaoundé), a notification of exploitation (from the regional delegation of forests), an endorsement (from the divisional delegation of forests) and an exit authorisation (plus a certificate of origin for non-timber forest products or NTFPs). This is often in addition to some form of agreement with a private-sector timber extractor/buyer. Upfront costs can be in excess of US$5,000–15,000 especially if commercial trade is legally registered – which is prohibitive for many communities.

The current markets in Cameroon for timber (US$132 million per annum) and NTFPs (US$65 million per annum) currently offer little value to CF participants as they are restricted to the low-paid production end of the value chain. There are many challenges to do with the resource base, financing, value-chain relationships, bureaucracy, skills and capacity, and market perceptions of CF. Considerable efforts are required to strengthen CF rights, organisational scale and management, technical capabilities and financial management skills, in order to improve value addition at community level – and this is where sustainable forest-business incubation could be so useful.

1 The OHADA Uniform Act relates to commercial companies and economic interest groups.

At present within Cameroon there are a variety of state, non-state and private-sector actors that have some mandate to support forest business. For example, in addition to the Ministry of Forests and Wildlife (MINFOF) (which treats CF more as an instrument of forest policy), there is also the Ministry of Economy, Planning and Regional Development (MINEPAT) (which could in the future treat CF more as a development tool) or even the Ministry of Small and Medium-sized Enterprises, Social Economy and Handicrafts (MINPMEESA) with a mandate to support small businesses and potentially CFs. Many non-governmental organisations (NGOs), both national and international, have track records of CF business development support. Past NGO CF efforts have in general lacked the strong market focus that is required to make business work – but there are new innovations happening under the TMP-ICRAF-Dryad project cluster[2] and the IIED-INADES-CoNGOs project cluster[3] that are improving this.

Institutional options for improving CF forest-business incubation are to be found in: state entities, NGOs, private-sector institutions, and democratic forest and farm producer associations or cooperatives. For the sake of long-term sustainability, the ideal might be to house forest-business incubation in second-tier associations, but only once these have become profitable in their own right. The advantages are that financing could come from value-added processing, marketing and costed service provision – rather than from projects. Finding innovative ways to channel long-term finance from FLEGT (the European Union's Forest Law Enforcement Governance and Trade facility) or REDD+ (Reducing emissions from deforestation and forest degradation) into such entities could also prove useful. In the shorter term, project-based NGO networks that draw on existing private-sector incubators and links could be used to establish those second-tier producer organisations. These could target Cameroon's different socio-eco-geographical regions, according to specific opportunities and/or by comparative advantage.

In terms of practical priorities, this calls for:

- Adopting a national approach promoting CF in different eco-geographic regions
- Promoting and developing clusters of existing CF groups and cooperatives (with the aim of establishing second-tier aggregator and marketing organisations)
- Adopting a more rigid value-chain approach to CF analyses by supporting NGOs
- Instituting a performance-based approach within any business incubator with rewards for positive CF market outcomes
- Promoting diversified value chains away from timber with strong research involvement
- Developing a strong network of progressive private-sector buyers (for timber, NTFPs, agriculture etc) involved in CF
- Engaging vigorously to evaluate and strengthen a strong role for MINEPAT
- Significantly developing and promoting the social, environmental and economic case of CFs, and
- Establishing strong links between CF business-incubation services and REDD+, Bonn Challenge,[4] African Forest Landscape Restoration Initiative (AFR100),[5] FLEGT, other payments for ecosystem services (PES) schemes and similar environmental management programmes.

In terms of next steps, there is a need for clear leadership by a credible and well-known donor organisation or technical partner. Everyone – especially the government of Cameroon – is aware that CF in Cameroon has been (and to a significant extent remains) a product of support from the UK Department

2 The World Agroforestry Centre (ICRAF), TMP Systems and partners (including NGOs and community-forest enterprises in Cameroon) have launched the five-year Dryad project to enhance sustainable management of community forests in Cameroon. The project is funded by DFID.
3 The CoNGOs project (NGOs collaborating for equitable and sustainable community livelihoods in Congo Basin forests) is a DFID-funded project involving a consortium of NGO partners including INADES Cameroon (African Institute for Economic and Social Development or Institut Africain pour le Développement Economique et Social) and is led by the International Institute for Environment and Development (IIED).
4 The Bonn Challenge is a global effort to bring 150 million hectares of the world's deforested and degraded land into restoration by 2020, and 350 million hectares by 2030. See www.bonnchallenge.org/content/challenge.
5 AFR100 is a country-led effort to bring 100 million hectares of deforested and degraded landscapes across Africa into restoration by 2030. See https://afr100.org.

for International Development (DFID). With this leadership, engagement at the national level can begin. Putting in place CF business-incubation mechanisms (CF-BIM) would not be reinventing the wheel. Given that there are very few CF associations in Cameroon it would probably need to be driven in the first instance by a lead market agency (perhaps a business-oriented NGO), which could provide business incubation to potential CF suppliers of its own products. The NGO Tropical Forest and Rural Development Cameroon (TFRD) with its commercial arm Tropical Forest Food and Cosmetics (TFFC) could be one promising option.[6] Moving forward, the first step is to compress the priorities outlined above into three strategic objectives, and a framework for implementation is advanced in the concluding text of this report:

- Mobilise national stakeholders towards CF-BIM
- Develop priorities for sustainable value chains of CF products, and
- Improve institutional, legal and regulatory frameworks for CF-BIM to simplify the administrative process.

In the longer term, there is an urgent need to recognise the failure of Cameroon's CF legislation to meet its own objective (ie community development). There are clear reasons to reform Cameroon's CF legislation to make it more amenable to sustainable business incubation. The impetus for such a process is given by the Yaoundé Declaration (Bolin 2019) – signed by all 17 organisations involved in the CoNGOs project that commissioned this report – which states:

The concept of community forestry in the Congo Basin has come of age. The DRC model of Local Community Forest Concessions, allows for large forest territories based on customary practices to be attributed in perpetuity. It promotes multiple uses for community forests, including cultivation of non-timber products, agriculture, conservation, as well as social and spiritual functions. These features in turn now need to be integrated in the legal frameworks and practices in Cameroon, Gabon, the Republic of Congo and the Central African Republic.

6 TFRD is a Cameroonian NGO working in the north of the Dja Biosphere Reserve. Tropical Forest Food and Cosmetics is an offshoot company founded in 2017 which works with groups of women who live around the reserve to promote and market NTFPs.

1. Why we need sustainable business incubation for community forestry

1.1 What is forest-business incubation and why is it challenging?

Forest-business incubation is a support process that accelerates the successful development of sustainable businesses in forest landscapes (Macqueen and Bolin 2018). A business incubator is an organisation that provides such a support process. Over time, the business incubator concept has evolved from that of shared space for entrepreneurs to learn from one another (first generation) to shared space and mentoring (second generation) to shared space, mentoring and networking (third generation) (Bruneel *et al.* 2012).

Forest business incubators generally serve the needs of promising early-stage businesses which might lack premises, facilities, market information, technological knowledge, business-management experience, procedures, finance and legitimacy. This support process is very important, because there is clear evidence globally that most growth in value generation and employment comes from existing businesses rather than start-ups (Shane 2009). Moreover, there is a strong correlation between firm age and survival (Haltiwanger *et al.* 1999) which suggests that once a business has developed critical know-how it can adapt and flourish.

Delivering business incubation in remote forest landscapes, however, is challenging. In forest landscapes there are generally low densities of educated entrepreneurs, high logistical costs, scarce infrastructure, and few capable business mentors. Moreover, the links that are vital for a business to grow and flourish are hard to come by, for example to legal authorities, finance or insurance, research and development etc (see Figure 1.)

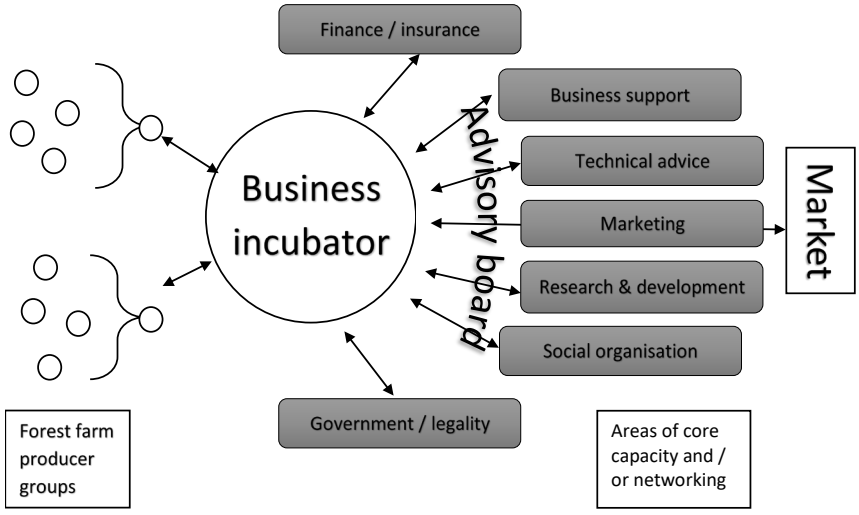

Figure 1. Important areas in which a business incubator provides training and linking services

Source: Macqueen and Bolin (2018)

In a global review of different business-incubator models operating in forest landscapes it was found that financial sustainability was a key concern (Macqueen and Bolin 2018). The most common pattern of

incubator financing was through a mix of public grants (eg projects) and some client payment for services (eg fees). But too often, such models collapse once project funding ends. A more sustainable model was seen in incubators that could rely on their own business revenues (eg in umbrella cooperatives that added value to the product from their members or in lead firms sourcing from various clients). So for building more financially sustainable forest-business incubation, three priorities were laid out:

- Greater channelling of development aid and or climate finance into professional forest-business incubation (eg through REDD+ implementation finance)
- Stronger efforts to establish second-tier forest and farm producer organisations (FFPOs) (aggregation businesses) or other lead firms that use their profits to finance forest-business incubation of their forest suppliers, and
- More concerted and sustainable support through government services.

1.2 Why forest-business incubation matters for Cameroon's community forests

Cameroon's total area of humid high forest with 30 per cent or more canopy cover is approximately 21 million hectares or 45 per cent of the total land area. Depending on the methods of estimates and definition, forests in Cameroon range from 18 to 31.54[7] million hectares – (see assessments by de Wasseige *et al.* 2015; Hanson *et al.* 2015). Forests are therefore an important national resource both for conservation and production. Conservation areas (including national parks, forests reserves and hunting zones) currently cover 20 per cent of the national forest area with production forests for sustainable timber extraction making up 40 per cent of the national forest area.

Sustainable forest management in Cameroon aims for sustained yields of multiple products from the forests in order to achieve economic, social and environmental objectives. While the system has relied primarily on a model of large logging concessions, there have been vocal criticism of the social benefits of the industrial concession model (Counsell *et al.* 2007; Lescuyer *et al.* 2012).

Cameroon's 1994 Forest Law was the first in Central Africa to promote sustainable community forest management as a responsive strategy for increasing social benefits from local development. But it sited them in 5,000ha blocks of non-permanent forest estate – rather than in the more productive permanent forest estate (Mbile, 2008). For many of the original nomadic indigenous people of the region, this process of sedentarisation within limited boundaries has involved an erasure of their culture (Pemunta 2013). And even though forest conversion is allowed in those areas, community forests were still required to operate under a costly simple management plan (Cerutti and Tacconi 2006). As of 2017, about 450 community forests exist, but only 285 have finalised simple management plans covering over 1 million ha, roughly 5 per cent of the total forest area (Minang *et al.* 2017).

Yet when one looks at the recent upsurge in small-scale logging in Cameroon, it shows a familiar pattern. Small-scale logging comprises two main types: community forestry with a turnover of approximately US$2 million and individual chainsaw milling (almost always informal) with an annual turnover of approximately US$106 million (Lescuyer *et al.* 2016). Informal milling undoubtedly contributes to local economies, but it does not come under the legal institutional umbrella of 'community forestry'. Informal milling is a path of least resistance that good entrepreneurs follow because of the impediments to developing a CF business model. This pattern suggests the need to think again about the significant constraints in converting community forestry into economic turnover that benefits local forest people in Cameroon – and to find a way of harnessing the entrepreneurial energy behind informal individual chainsaw milling through better recognition, oversight and support in policy.

7 Vegetation cover is predominantly of trees or shrubs, covering a minimum surface area of 0.5 hectares, within which trees and shrubs make up a minimum of 10 per cent and which can reach a minimum height at maturity of 3m.

The majority of community forestry timber is harvested by individual entrepreneurs, both from within and external to the community. In 2011, an estimated 75 per cent of the active CFs were operated under contract by private operators compared to 25 per cent directly by communities (Cuny 2011). One major obstacle for such business models to emerge is the relative high start-up costs compared to the benefits involved. Costs for establishing a CF are estimated to be over US$15,000 (Lescuyer *et al.* 2016) and exploitation for commercial purposes requires an additional US$4,300 of administrative outlay (Minang *et al.* 2017). Even if CFs do manage to find someone to help cover the upfront costs, operational costs (preparation of logging, logging and management) are so high it makes the profitability of CF timber businesses questionable (see table on page 5 in Lescuyer *et al.* 2016).

Assessments of the profitability of CF in Cameroon have shown that profits can be made, albeit with major differences between contexts. Factors such as communities' technical and managerial skills, access to finance, legal resources and market information, and the communities' capacity for vertical integration affect the outcome (Beauchamp and Ingram 2011). Yet in the current enabling environment, there appears little benefit in starting and then running timber operations in a community forestry context, compared to selling standing stocks of timber to someone else who does all the paperwork and makes the investments required (Lescuyer *et al.* 2016). These issues are not confined to Cameroon and raise questions about whether the model prescribed in law for CF is viable as a basis for business (Lescuyer *et al.* 2019). Research have also found that social impacts and dependence on forest-linked income also tend to increase in more remote forest areas for both timber and NTFPs (Lescuyer *et al.* 2016; Ingram 2017). So, getting the business model right requires more thought and is a key starting point for forest-business incubation.

Clearly fundamental are the institutional arrangements and social capital within any community forest business (or indeed any informal chainsaw milling). Returns to the community members who invest in a business must cover the costs they incur. If there are not significant economic benefits to the right people, this represents a major obstacle to CF viability (Baynes *et al.* 2015). It has been demonstrated beyond doubt that power dynamics at community level in Cameroon diminish economic benefits to the community at large and so rob CF of legitimacy within the broader community (Movuh and Schusser 2012). Furthermore, the requirements that CF develop expensive simple management plans in the non-permanent forest domains have no environmental logic (Cerutti and Tacconi 2006). It makes little sense to insist on forest plans for areas that officially fall outside the permanent forest estate and so do not have to remain as forest. The capacity of communities to benefit from CF is majorly impeded by competition from industrial loggers who access newly opened logging areas which have comparatively lower operational costs – which adds to disadvantages associated with a lack of technical skills and excessive distance to markets (Ezzine de Blas *et al.* 2009).

Recent analyses of community forestry governance in Cameroon suggest that two of the main drivers of a handful of more positive outcomes in community forest governance include economic activities that generate direct benefits for the community and adequate technical support (Duguma *et al.* 2018; Piabuo *et al.* 2018). This suggests that it is easier to put in place the necessary governance structures for sustainable forest management at community forest level if the benefit-sharing arrangements are clearly articulated between those working in the business and the community as a whole. If the provisions for community forests make such revenue generation impossible, or the sharing of benefits from commercial operations are unclear or unfair, people will simply turn to alternative, less-formal means of generating income. With this in mind, forest-business incubation could be a vital priority for improving the returns and impacts of Cameroon's community forests, but only if a business model can be devised that is not impeded by administrative start-up costs and clarifies from the outside who stands to benefit from its operations, both directly and indirectly, and aligns those interests within the business model. Community forest business should be an investment opportunity (Lescuyer *et al.* 2019) that makes financial sense, both to local community members who put their land, time and effort into it, but also to any external investors who might finance value addition.

1.3 Community forest land allocated and use in Cameroon and implications for business incubation

1.3.1 Definition and types of forest in Cameroon

In 2017, Cameroon came up with an all-encompassing definition of forests in order to adhere to principles for REDD+. Under Cameroon's national REDD+ strategy (MINEPDED 2017):

A forest must have a vegetation cover pre-dominantly of trees or shrubs, covering a minimum surface area of 0.5 hectares, within which trees and shrubs make up a minimum of 10 per cent; and which can reach a minimum height at maturity of 3m.

The term 'forest' does not include agroindustrial monoculture plantations which apply agronomic techniques of production for their management (MINEF 1994 – Decree No. 95/531/PM of 23 August 1995).

Given this current definition of forests in Cameroon, the social and economic relationships between people and forests are relevant across the entire national territory (not just the humid high forest). People's relationships with forests can be formally registered and with taxation paid to the state by private forest users (timber exploiters) or customary, where communities and individuals living inside, or near forests use the forests directly for their needs (Article 27(2) of the 1995 Decree). Use of forests by individuals and or communities can also occur many kilometres away in urban areas (Beauchamp and Ingram 2011). Products taken from forests in Cameroon include timber, food, fibre, fuelwood, fodder and medicines. Most people living in forests also use the land for growing annual and perennial crops and for habitation.

In Cameroon, most densely forested regions have remained relatively sparsely populated (BUCREP 2010). Higher population densities can be encountered in the highlands, plateau and far northern Sudano-Sahel – plus also in urban areas. Nevertheless, migrations for opportunity are common and land-use change leading to degradation of land and forest cover has been reported (Tunk *et al.* 2016). All forest types in Cameroon are in constant flux due to loss and degradation driven by human activities, especially due to large-scale and smallholder farming (Carodenuto 2015; Zhuravleva *et al.* 2013; Duveiller *et al.* 2008) and other factors, such as climate change (Carodenuto 2015). Understanding the relationships between population density, resource endowment and community forest governance is relevant to understanding how community forest businesses might be incubated in Cameroon (Ezzine de Blas *et al.* 2011).

As noted above, the forest resource base itself is increasingly being affected by climate change, notably, atypical rainfall patterns and greater prevalence and impact of fire leading to forest loss and land degradation. The government has adopted a national REDD+ strategy (2017); a national forest investment programme (2017) and has pledged to restore degraded lands through the AFR100 and Bonn Challenge landscape restoration initiatives (2017). Sustainable forest-business incubation could and should be part of those commitments. But to attract inward investment, thought needs to be given to how to mitigate risks associated with climate change.

1.3.2 Land-use planning challenges to forest-business incubation in Cameroon

The details of forest categorisations into permanent forest estates (PFE) and non-permanent forest estates (NPFE) in Cameroon are well known (Ekoko, 1998; Etoungou 2003; Oyono 2003). The major forest categories in each include:

- In PFEs: State forests (production forests of all types), protected areas and forest reserves (could become production or conservation zones), official buffer zones, and council forests (to be managed by local councils).

- In NPFEs: National domains (forests or woodlands etc for which no titles are held), community forests (statutory agroforestry zones), private forests (private forest plantations) and other non-classified zones.

In this report we also divide community forests into three main clusters, used later to frame contexts for potential interventions. These are:

- Relatively densely settled Sudano-Sahel and highland savannah landscapes
- Highland plateau landscapes, and
- Humid high forest landscapes (this latter category comprises many of the community forests established to date).

In Cameroon, there are persisting overlaps between traditional cultural practices and systems for land use. Formal policy regimes use statutory control instruments, like the 1994 Forest Law and its texts of application (Karsenty and Vermeulen 2016). For instance, in the Sudano-Sahel, highland savannah and highland plateau landscapes, considerable lands are still held by powerful traditional authorities, dominated by men (ANAFOR 2006). For community forest businesses, this limits women's access to and control of lands to home gardens of 1–2 hectares, and even to temporary annual croplands. Lands to which women have cultural access are often marginal and can be exposed to bushfires and conflict with livestock, owned by men.

Additionally, there are habitual conflicts in humid forest landscapes between large-scale agroindustrial plantations owned by national elites or by multinationals, and the holders of indigenous rights (Nguiffo and Schwartz 2012). In those contexts, community forests have often been seen as a foundation to secure land and forest rights for communities and protect traditional ways of life. There may be powerful economic forces arrayed against the registration of community forests and the issuance of relevant permits. Additionally, developing community forest business in remote 5,000ha plots with communities not familiar with business and without the technology or capital to invest is a challenge. This is particularly true for the development of timber business.

Within Cameroon, there is not yet a comprehensive land-use plan for the country as a whole. As a result, the rural development sector strategy of the Ministry of Agriculture and Rural Development (MINADER), the mining code, the national investment programme and others can use different land-allocation instruments which result in overlaps of jurisdiction (ANAFOR 2006). These can present a significant challenge to community forest-business incubation – as they introduce contested resource rights that would disrupt business activities.

1.3.3 Gender considerations relating to community forestry business

Forest communities (and their constituent pool of entrepreneurs and labour force) are roughly equal split across the two genders. Business incubation depends on the involvement of the broadest possible number of potential entrepreneurs. Yet in some landscapes, traditional cultural practices of forest land use restrict the role of women – and thereby present an additional barrier to forest-business incubation.

Despite women's disproportionately higher role in providing rural labour, baseline analyses for women-forest-tree interactions show some restrictive criteria (OECD Development Centre; Mbile *et al.* 2009) in areas such as:

- Access to and control of land and tree resources
- Access to ecosystems services
- Access to organisation membership and assets, and
- Levels of women's education, their decision making, networking and financial capacity.

Women's involvement with trees and forests in parts of the highland plateau (west and northwest) are mostly tied to the simple collection of fuelwood and fruit. Such areas are generally agrarian, more densely

populated, with strongly hierarchical traditional authority structures (ANANFOR 2006) which generally disfavour women's entrepreneurial empowerment. In humid high coastal and hinterland forests, the socio-cultural place of women is different, more due to the absence of strongly hierarchical traditional authorities, than to any difference in cultural perceptions of men and women. Therefore, the roles of women and indigenous forests groups remain associated to a much wider range of forest products beyond fuelwood and traditional agricultural crops and fruits. Nevertheless, in Cameroon the laws on freedom of association and political pluralism (Law No 92/006 of Ministry of Agriculture; 14 August 1992 Ministry of Finance Decree No 92/455/Pm of 23 November 1992) and others have combined to have a positive effect on women's ability to organise themselves. There are opportunities that need to be developed to build effective women's business organisations, strengthen links to women's networks, and provide tailored business incubation for women (Bolin 2018).

1.3.4 Illegality and how it affects community forest-business incubation

Community forest business requires close control over forest resources – as they constitute the foundation for sustainable extraction upon which business can be built. Legality should underpin that control. Under the current forest and wildlife laws and their texts of application, the notion of legality broadly rests on respect for statutory guidelines on fiscal, spatial and temporal requirements, and on rights and procedures for use of forest lands and resources. Trends in illegality can be due to legitimate or non-legitimate factors. Legitimate factors refer to illegal actions that are either based on unavoidable needs for forest conversion like population growth linked to expanding community subsistence needs or to illegal actions that are undertaken because of unfair costs of compliance.

As an example of the former, encroachment into some state forest lands by expanding food crop agriculture (especially by women) is essential for survival. While this is unavoidable, it does pose a real challenge to the maintenance of community forest business, unless some means of integrating or domesticating relevant parts of forest production can be achieved on farm.

As an example of the latter, analyses of community forest compliance steps measured by the EU's FLEGT facility (de Souza 2018) demonstrate that it costs communities almost twice what it costs industrial timber exploiters to comply with the law (see steps in Table 2), which could qualify as grossly unfair. This unfair cost also includes acquiring knowledge of procedures and finding out and complying with what is or is not legal. It should not be assumed that communities are ignorant of these costs – and that reality presents community forest business with an often-insuperable dilemma: either undertake legal compliance and struggle to become economically competitive due to the legislative costs or become competitive through illegality. This is a very real challenge facing business incubation – and one reason for the interest in building business initially around NTFPs where competition from established industries may not be so fierce. Efforts to improve forest-business incubation must clearly address these inequalities in legal compliance, through further advocacy work with government.

Non-legitimate illegality, by way of contrast, is not driven by survival needs, or gross unfairness, but by the desire of some private-sector operators (of all scales) to make excessive profits. For example, some private-sector operators who source timber from community forests opt not to follow legal guidelines in community negotiations, nor to pay a fair price for the timber (aware that most communities lack the wherewithal to extract and transport timber), and undertake excessive felling or other forms of illegality. Challenging that type of legality requires that communities have better organisation and business alternatives – and this is both a challenge and opportunity for business incubation.

External events can exacerbate such illegality. For example, in the early 1990s the Central African franc (FCFA) devaluation and economic crisis coincided with a spike in non-compliance in the forestry sector as economic actors sought to shore up profits through illegal forestry (Enviro-Protect, 1997; Tchoungui *et al.* 1995). While these macro-economic events, forcing micro-economic constraints on livelihoods, are not excuses for illegality, they demonstrate that reactions to poor macro-economic performance can also create internal factors driving non-compliance.

Illegality in Cameroon is widespread (Lescuyer *et al.* 2016) and is encouraged by the excessive bureaucratic steps that have to be undertaken in order for community forest business to develop legally.

This present a significant challenge to the concept of forest-business incubation in Cameroon and one that will require strong partnership with government to reduce excessive bureaucracy.

1.4 The historical relationship between community forests and business in Cameroon

1.4.1 Definition of community forests in Cameroon

A community forest in Cameroon is a legal entity, and it is defined under Article 3 (11) of the Decree No. 95/531/PM of 23 August 1995, of the Forestry Law No. 94/01 of 20 January 1994 as:

[A] forest of the non-permanent forest estate, and object of a management agreement between a village community; and the service in charge of forestry. The management of such a forest shall be the responsibility of the village community concerned, with the technical assistance of the service in charge of forestry (MINEF 1994).

The CF defined above has several parameters and mandatory requirements defined by law. For example, Section 20 of Forestry Law No. 94/01 refers to the parameter that CF involves not only forest management but also agroforestry:

[T]he non-permanent forest estate falling on lands on which other agricultural, silviculture and pastoral activities may be carried out; as the favourite area for community forestry activities, developed on the basis agroforestry (ibid).

Additionally, Article 3 (16) of the Decree No. 95/531/PM mandates that CFs must be governed by a simple management plan:

A contract by virtue of which the service in charge of forestry allots to a community a portion of national forest which the community manages, preserves and exploits in its own interest. The management agreement is accompanied by a simple management plan which determines the activities to be carried out (ibid).

Finally, Section 37 (5) of the Law No. 94/01 makes specific the fact that products arising from CFs, except where prohibited by law, whether timber or non-timber forest products (including carbon) belong to the community:

[F]orest products of all kinds resulting from the management of community forests shall belong solely to the village communities concerned (ibid).

The implementation of CF in Cameroon is governed by a manual of the procedures for the attribution and norms for the management of community forests (MINEF 1998; see also MINFOF 2009), hereafter referred to as the CF manual, a document which officially became a legal instrument in Cameroon on 20 April 1998.

1.4.2 The different models of business derived from CFs

While the concept of CF involves a range of different forest-linked activities, for the purpose of commercial exploitation there are also different models that can be considered as community forest business. The law clearly identifies the community forest-management committee as the legal entity representing the rightsholders (the village community). However, different models exist for the establishment and formalisation of a CF business. One of the most common options is the establishment of a business based on the legal entity holding the right to the forest resource and responsible for the simple management plan on behalf of the village community itself. In Cameroon's case, this is an association called the community forest-management committee.

Another option is to allow for individual and/or group businesses to be established from within the village community – such as common initiative groups (CIGs) or cooperatives – that then make an agreed

contribution to the SMP. For example, this could be through the contribution of labour or business income in a form of a 'tax' paid to the community forestry committee who in turn ensures revenue goes towards a common pool for the village community. Both CIGs and cooperatives can generally be found in different settings and sometimes in combination. The latter allows for both individual and collective development aspirations to be realised in line with the longer-term communal plans laid out in the SMP.

1.4.3 Requirements for undertaking business in community forests

Some of the constraints to implementing CFs 20 years after the CF manual was approved may be because the legislation does not make business easy (SAILD and FUGIRFOC 2018; Fern and CED 2018). Businesses in Cameroon are governed by the OHADA Uniform Act (1997). Table 1 presents CF requirements as compared with the general requirements for industrial businesses. It is immediately apparent that CF businesses are restricted in comparison with industrial logging (when seen against the usual prescriptions in the OHADA business law), because they are limited to 5,000ha, have forced communal steps and controls, and are set up primarily as non-profit entities. This presents a challenge to forest-business incubation which might ideally require a forest area to be based on an optimal business scale, have flexibility with regards to management structures within overall community control, and be based on a for-profit legal entity.

Table 1. Comparing provisions for community forests with comparable OHADA provisions in Cameroon

	Community forests (CFs)	OHADA business law	Observations on constraints due to CF legislation
1	Section 20 of Forestry Law No. 94/01: physical space restricted to national domains; non-permanent 'forest' estates.	There is no spatial or physical restriction for businesses under OHADA, except perhaps within the member states.	Unlike industrial forestry, CFs are consigned only to non-permanent forests and are unjustifiably limited to 5,000ha (much smaller than conventional industrial limits) implying that CFs and industrial logging are not considered equally as businesses.
2	Article 3 (16) of the Decree No. 95/531/PM: specified a contract between a community and the forestry administration.	Businesses under OHADA can involve contracts between the business partners themselves (Art. 4) and not with a specific ministry. Or they can be owned by a sole proprietor not just by an entire community (Art. 5).	Like industrial logging, CF is primarily answerable to MINFOF, but CF faces a set of specific and costly consultative and ownership challenges (see steps below) relating to the whole community.
3	Section 37 (5) of the Law No. 94/01: community ownership with benefits expected to accrue to an entire community.	Purpose of a business under OHADA is for commercial purposes and profit (Art. 4, 6). Ownership under OHADA (Art. 5) can be individual.	Principal aim of CF is perceived to be not profit, but community development. Managing entities for CFs: Associations and CIGs are also by law non-profit – but this directly contradicts the intentions of the law that CFs contribute financially to community development.

In the CoNGOs project, some of these challenges have been addressed by dealing with MINPMEESA when attempting to establish different enterprises within the CF context. Rather than make the non-profit

CF committee the legal business entity, it has been possible to explore different options for community forestry business that allow both for collective ownership and commercial purposes.

Depending on the size (revenue and number of owners) of the business, options exist such as 'simple cooperatives' (at least seven people), 'cooperatives with business administration' (minimum 15 people), 'artisanal enterprises' or 'private enterprises' (a private limited liability company) etc. Each have specific tax implications and are suitable for different types of businesses depending on their scale and level of operations. But they do provide options for CF that allow for commercial profit making. The institutional models and social characteristics strongly influence the manner in which CFs and the business based on them operate in practice (see Table 2).

Table 2. Overview of the community forest process according to the manual of procedures

	Stages (Law 94/01)	Responsibility/actors	Expected outcomes/observation
1.	Sensitisation: information and awareness	MINFOF, NGOs, technical and financial partners (TFPs)	Communities are well informed of their rights and responsibilities
2	Creation of legal entities	*Laws* 90/053 and *92*/006; MINFOF, NGOs, TFPs	Appropriate forest management entities: NGOs, associations, CIGs, or cooperatives have been created
3	Consultation meetings	MINFOF, NGOs, TFPs	Associations, CIGs, communities are organised
4	Attribution of CF ➢ CF is reserved ➢ A provisional management agreement is signed ➢ Draft SMP is produced ➢ CF is attributed (Rejections also occur)	MINFOF, NGOs, Associations, CIGs, TFPs (total average time estimated to complete process is four years (Ezzine de Blas *et al.* 2009)	Certification of attribution of CF (having at least a draft SMP is often required for attribution)
5	Preparation and submission of final simple management plan (SMP) and final management agreement (FMA)		Final SMP and FMA are approved
6	Actual implementation of SMP and FMA		CAE and accessories; transport authorisation, lumberyard pass, notification of exploitation, exit authorisation, certificate of origin (for NTFPs)
7	Supervision, monitoring, controls and applicable taxation		Periodic progress and evaluation reports, felling taxes are paid

Source: MINFOF (2009).

In Cameroon, the SMP is considered the bible for community forests. It describes all the planned actions: exploitation, management, conservation and agricultural activities etc. CFs as legal entities are run by a management team and therefore any reference to CF here pertains to both the exploitable resources and the management team, working on behalf of the community.

There are considerable administrative steps to undertake. Prior to the initiation of any business production of timber or non-timber products, the community forest must acquire an annual exploitation

certificate (CAE). The CAE is issued by MINFOF in Yaoundé. The CAE approves the volume, species and compartment of the community forest to be exploited and the species, quantities and location of NTFPs and/or other products. Simultaneously, the CF must apply for two additional documents: the transportation authorisation (*lettre de voiture*) and the lumberyard pass (*carnet de chantier*). These latter documents are also issued by the Central Forestry Administration (MINFOF in Yaoundé). The CF must then acquire a notification of exploitation (*lettre de notification*) from the regional delegation of forests prior to exploitation. Before the production, transport and sale of forest products (timber or non-timber) can be carried out, all three documents (notification of exploitation, lumberyard pass and transportation authorisations) must be further endorsed by the chief of post at the relevant divisional delegation of forests. In the event of effective production, a fourth document – the exit authorisation (*autorisation de départ*) – has to be obtained before products can be taken out, loaded and transported/delivered to markets or to the consumer.

In addition to these administrative steps there may also be complex negotiations required with private-sector partners. Due to technical, business and financial capacity gaps in forest communities, business development often involves pre-arranged agreements with private-sector actors, whether for timber or non-timber products, stating species, nature of products, quantities, dimensions of products and delivery period. But whether the production is carried out either by the community forest itself or by a licensed operator sub-contracted by the community (*exploitation en régies*), the same legal documentations apply. Revenues are based on market value of products. Revenues to the communities are based on negotiations between the community forest and the licensed operators.

Since 2017, there has been a felling tax (*taxe d'abattage*) payable to the government for timber harvesting. The most common practice involves the licensed operator providing an advance cash payment to the CF management entity to cover that cost of the operations, which are then deducted (by the licensed exploiter) upon payments/final products delivery at the point of the exit authorisation (*autorisation de depart*) of products from the CF environment.

In the case of NTFPs, a certificate of origin (*certificat d'origine*) for traceability purposes often accompanies the exit and transport authorisations. Many of the NTFPs are sold locally or in local markets. Around a third are traded with a large share destined for regional markets, although most of the trade is organised by intermediaries, not those harvesting (Ingram 2017). Where the demand for NTFPs is substantial (this has to be pre-arranged), the CF is pre-notified by the exploiter regarding NTFP species, timing of collection and quantities required. The CF management unit then determines what is allowable according to the SMP, and prices are pre-negotiated and collection and delivery are arranged. This can also involve some pre-financing, like in the case of timber.

The major eventual destinations and markets for timber products and bulk non-timber products are urban centres within Cameroon (major towns and cities), where hardwood prices range from 200,000–500,000 FCFA per cubic meter. All prices are negotiated from the outset between licensed operators and the CF or between buyers and the community forest (if the community is acting on its own). Hardwoods attract the highest prices with the following being worthy of note (by scientific and commercial names):

300,000 FCFA/m^3 – for example, *Entandrophragma cylindricum* (sapele), *Milicia excelsa* (iroko), *Afzelia africana* (dosie)

400,000 FCFA/m^3 – for example, *Piptadeniastrum africanum* (dabema), *Entandrophragma candollei* (kosipo), *Guibourtia demeusei* (bubinga)

500,000 FCFA/m^3 – for example, *Pericopsis elata* (asamela).

1.5 The main community forest business opportunities

1.5.1 Benefits from community forests

As discussed, CF business in Cameroon may be controlled by the community directly, or more often by partners in the private sector. Developing a Cameroon CF in real life is a complex process. The products and services emanating from CFs, and benefitting communities, accrue in either directly or indirectly.

Benefits directly accruing to communities from CFs:

- Direct subsistence use or consumption of: water, food, medicine, fuel, fibre etc
- Revenue to the CF account paid by private-sector partners or buyers of timber, NTFPs or wildlife products, and
- Direct payments of wages for community-based labour for activities managed by a private-sector partner.

Benefits indirectly accruing to communities from CFs:

- Opportunities for interaction with local legal experts and forestry/agriculture skills providers
- Indirect, petty trading opportunities to supply the workforce created by increased local activity, and
- Opportunities for hiring out specialised equipment, sale of power or other technologies.

In this report, we are interested in those benefits that accrue directly to communities – and that involve sales transactions (ie not subsistence benefits). We are also primarily interested in models of business that are locally controlled (rather than controlled by private-sector partners). Table 3 provides details of the different products and services accruing to communities in the different eco-geographical categories. It should be noted that the figures (especially for CF areas) are based on official figures that may contain significant errors due to inventories of questionable quality. They should be taken to indicate the rough geographical concentration of CFs, and not be used to estimate potential production figures.

Table 3. Ecological zones, estimated CF resource base, and products and services from CFs[8]

	Agroecological zone	Region (S)	Estimated total CF areas (Ha)	2016 total authorised timber volumes (m^3)	% of total volume	Range of products and services
1	Sudano-Sahel savannah	Extreme North and North	16,452 (*1.8%)	0	0.00	Fuel wood (exotics), spices, fruits, medicines, fodder, agricultural products, construction materials
	Highland savannah	Adamaoua	0	0	0.00	
2	Highland plateau	North West and West	18,523 (*2%)	0	0.00	Fuel wood, construction materials, honey, spices, fruits, medicines, fodder, agricultural products
3	Single rainfall maximum, coastal forests	South West and Littoral	71,516 (*7.7%)	10,873	4.29	Timber, fuel wood, construction materials, fruits, spices, medicines, agricultural products, honey
	Double rainfall maximum, lowland forest	Centre and East	716,483 (*77.3%)	187,285	73.96	

[8] The estimated community forests resource base is taken from the authors' own analysis of official figures.

Single/double rainfall maximum, lowland forest	South	104,379 (*11.3%)	55,063	21.75
		927,353	**253,221**	**100**

The business opportunities for CFs are defined at least partially by their relationships to road infrastructure, agroecological opportunities, and population densities and distribution. For example, the CFs nearer to the central denser population areas and adjacent to main roads have considerably more opportunities than those in say the southeast of the country. These details can be further appreciated in the eco-regional and population map in Figure 2.

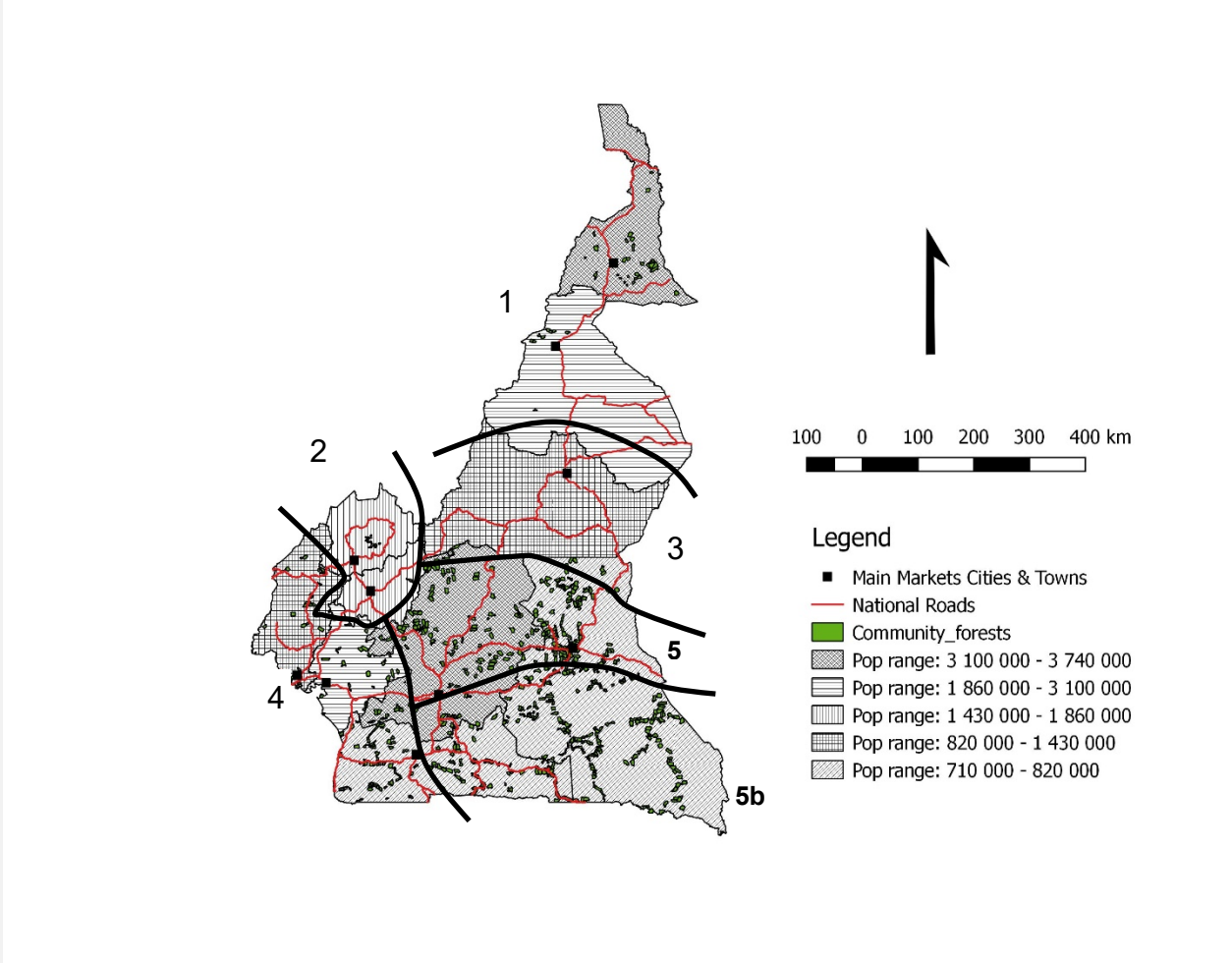

Figure 2. Cameroon CFs, population distribution, main roads and agroecological zones

Notes: 1 – Sudano-Sahel region 2 - Highland plateau 3 – Highland savannah 4 – Lowland forest, single rainy season 5 Lowland forest, double rainy season:

Source: Official classification (MINAGRI 2013) based on rainfall regime, soil types and elevation with impact on vegetation cover

1.5.2 Market opportunities

Market opportunities vary by product. On average, there is a market for approximately 830,000 m3 of sawn wood per year in Cameroon in the two main markets of Douala and Yaoundé and a few other major cities (Lescuyer et al. 2017), mainly in the form of beams, planks, scaffolding and rafters (ibid). In 2016, over 250,000 m3 of wood was authorised as exploitable from CFs by MINFOF. More than 90 per cent of these CFs with annual exploitable timber certificates in 2016 occurred within the high forests of the interior and coast (see 4 and 5b in Figure 2). Top among timber types demanded are hardwoods such as sapele, iroko, dosie, dabema, kosipo, bubinga, asamela and softwoods like ayous for formwork. Since much of this timber is not of the highest quality, we make a calculation based on an average price of 80,000 FCFA (US$160) per cubic meter, giving a conservative estimate of the market value of timber of about 66.37 billion FCFA (about US$132.7 million).

Regarding NTFPs, Awono et al. (2016) estimated the monetary value of 16 species of marketed vegetal non-timber forest products (VNTFPs), requiring and not requiring permits in Cameroon, at 32.3 billion FCFA (US$64.7 million per annum, and equivalent to 0.2 per cent of GDP. At least one of the 16 VNTFPs

in that synthesis occurs in all agroecological zones of Cameroon. Five NTFP products[9] alone have been estimated to have a combined annual value of US$45 million, providing employment to 270,000 people from the forest to urban areas (Ingram 2014). An estimated 5,190 people alone work in the complex bush mango (Irvinga spp.) value chain with an estimated 4,109 tonnes harvested on average on an annual basis between 2007 to 2010 (Ingram et al. 2017). This NTFP alone (which is prominent in the southwestern and eastern regions where most community forests are located) is estimated to contribute on average 31 per cent of harvesters' annual incomes (ibid). Similarly, a long-term study (2004–2008) on three VNTFPs exploitable from a single CF[10] showed that NTFPs development can generate up to 21,000 FCFA (US$10.50) per hectare per year. If communities were able to collect and market this themselves, they might be able to exceed the low rates of just US$1.90 per hectare per year in CF timber fees (Mbile 2012).

The bulk of both timber and VNTFPs is sold in the main population centres, where construction and furniture-making activities and human populations are largest (Cerutti and Lescuyer 2011). These are the capital city of Yaoundé (center region), Douala (economic capital in the Littoral region), and to a lesser extent all the other regional capitals and large urban centres.

The broadened definition of forests in Cameroon (MINEPDED 2017) has helped raise the importance of less timber-rich regions (savannah and highland plateau), and that of their NTFPs. The Sudano-Sahel and highland savannah regions (three northern regions) are net importers of timber for construction and furniture. The bulk of tree and forest products are VNTFPs comprising of fibre for fuel, leaves, fruits and nuts from a variety of indigenous and exotic trees and shrubs species. As a result, the Northwest and West regions possess the most extensive private plantation forests in the country (ANAFOR 2006). And although the Extreme North and North regions possess only 1.8 per cent of the combined CF area by 2016, the Extreme North Region alone has a demand potential of over 350,000 m3 thus representing a significant opportunity for sustainably managed timber products. In these Sudano-Sahelian zones, neem and eucalyptus poles are in high demand for housing construction and fuelwood, and can cost between 1,500–2,000 FCFA (US$3–4) apiece, with producers making up to 2.5 million FCFA (US$5,000) per year from sales (Tieguhong 2017).

Forest-business incubation in Cameroon, therefore, needs to be able to assist with a variety of market opportunities, and beyond just the traditional CF heartland of the southern high forest zone.

1.5.3 Opportunities at different stages in the value chain

CF business are generally involved with the very initial steps in a typical value chain shown in Figure 3.

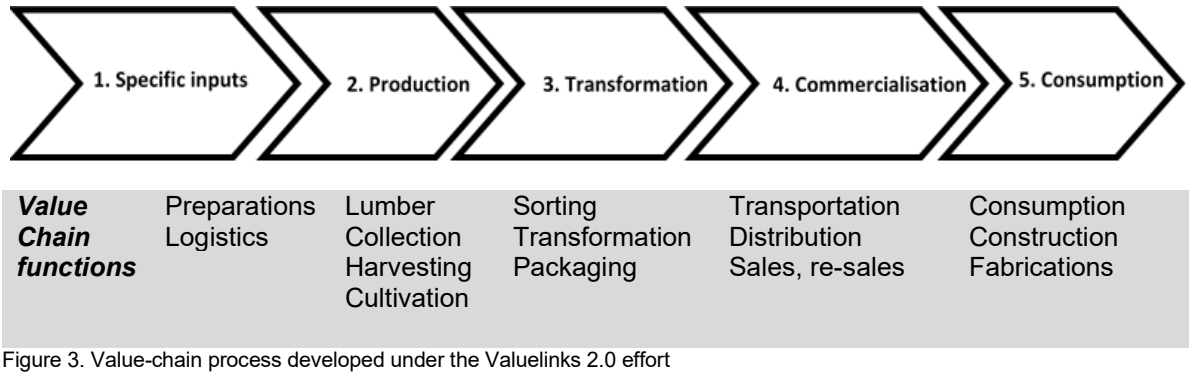

Figure 3. Value-chain process developed under the Valuelinks 2.0 effort

9 Including honey, gnetum (Gnetum spp.), bush mango (Irvingia spp.) safou (Dacryodes edulis) and pygeum (Prunus africana) (Ingram 2014).
10 The United Villages Development Committee (CODEVIR), which is a community forest in the southeast of 4,100 ha in a humid bimodal rainforest zone.

One adaptation of the value chain model is contained in Springer-Heinze's toolkit (2007) developed on behalf of the German Technical Cooperation Agency (GTZ). The major steps comprise of (though not limited to) the following:

- **Specific inputs:** For CFs, legal compliance is often a key performance indicator and motivation (eg CF secures communities' rights to land). For CFs, activities to delimit CFs are largely statutory and there is opportunity for direct involvement of legal experts. The cost of this stage, just prior to production (eg acquisition of annual exploitable volume certification), can be as high as US$5,600.
- **Production:** Depending on whether production is done by the community itself or by a private-sector partner, the distribution of benefits can be very different. In each case benefits accrue to the community due, firstly, to the scale of economic activities created by CF exploitation and, secondly, to the nature of any benefit-sharing agreement. Due to considerable upfront financial costs of timber operations, the external private operator option is the most common option (Lescuyer *et al.* 2017). Community labour benefits are marginal and so are direct revenue payments. For example, low-skilled labour is often only used for transporting sawn timber from felling to loading points. Analysis indicates, on average, the direct income to the community derived from a community forest managed under agreement can amount to approximately 22,000 FCFA/m^3 (US$44/$m^3$) as stumpage fees and same amount as labour-related income (Ezzine de Blas 2007). Other benefits accrue, such as improved road access for other uses. Under CF-managed exploitation, the CF gets the net revenues (less costs of labour, transport, equipment depreciation and maintenance). The income to the community from CF-managed exploitation can amount to 29,500 FCFA/m^3 (US$55.6/$m^3$) as net revenues and up to 48,200 FCFA/m^3 (US$96/$m^3$) as labour-related revenues (Ezzine de Blas 2007). The situation regarding production of NTFPs (vegetal or otherwise) can be different. Only when there is a huge external demand do external private-sector actors get involved.
- **Transformation:** Besides the production of planks as required by law, virtually no additional transformation of timber products occurs in CFs except in some of the new clusters being developed. For example, over the past 2–3 years, CFs of the Agroforestry Cooperative of the Tri-National (CAFT) in Ngoyla have been producing turned wood products and high-quality clothes hangers by transforming raw rattan through various processes. These hangers are then sold in supermarkets in Yaoundé. NTFPs are generally fully or partially transformed depending on the intended products to be marketed. Oils are pressed and bottled, fuelwood is collected and bundled, and kernels, vegetables, fruits and nuts are harvested, dried, sorted and packaged.
- **Commercialisation (marketing and sales):** Commercialisation of timber products from CFs is almost always undertaken by private-sector partners rather than the communities themselves. An exception lies in the commercialisation (at least at the local level) of NTFPs, which is in the hands of the producers and processors – mainly women. Men also get involved in the production and commercialisation of NTFPs during peak seasons. It also showed Pygmy communities recording production for all species studied (*Irvingia spp., R. heudelotii and B. toxisperma*) throughout the year. Another study (Mbile *et al.* 2018) focusing on women's agroforestry activities demonstrates how the commercialisation of kernels of *Irvingia wombolu* (an indigenous tree species) can achieve significant revenues for women, during the 'lean' months of January to March every year.

What is therefore a challenge to forest-business incubation for CF businesses is that the organisational capacity and scale of their activities limits them to low-paid opportunities at the input and production end of the value chain, rather than the potentially more lucrative transformation and commercialisation end of the value chain.

1.6 What support do community forest businesses need?

Although this section draws from the opportunity provided by the nationally relevant definition of forests, it should be noted that the South and East regions contain well over 75 per cent of all the community forests in Cameroon. These regions also have the highest proportion of CAEs in 2016. For these reasons, they remain the 'heart' of CF in Cameroon. Logically therefore, most of the examples cited in this section will be drawn from the southeast of Cameroon.

1.6.1 Barriers to community forest business

Community forests as businesses are widely thought not to have fulfilled their purpose (ie community development). So, what have been the main constraints and barriers to CF business? To frame these barriers, we analyse six different areas: the resource base and access, finance, markets and buyers, bureaucracy, skills and reputation (see also the work on risk management by Bolin and Macqueen 2016). These six areas constitute the main areas that forest-business incubation would need to address in its design.

1.6.2 Resource base and access barriers

The main barriers relating to the resource base include the following:

Size of the resource base:

- Relatively small surface area of community forests (5,000ha maximum)
- CFs are not necessarily contiguous, reducing prospects for association between several CF units
- Community forests are often previously exploited, product-poor secondary forests
- Demand for timber products is often highly selective, thereby narrowing value propositions
- Communities have weak capacity for resource regeneration and enrichment planting

Weak potential for diversification of community forests products base:

- There is too much focus on timber, and less on high-value NTFPs
- There is overall poor knowledge of the existing NTFP potential
- Agroforestry development is not vigorously supported
- There is very weak, outdated statistics on stock of resources, especially NTFPs
- There is very little or no value addition to products

Insufficient access to and control over resources:

- The steps to gain formal access to CFs are laborious and costly
- There are prevalent spatial overlaps and conflicts with other land uses
- Existing physical infrastructure deficit weakens access to resources and to the decision makers required to authorise CFs

Ethno-ecology knowledge and rights issues:

- Issues of who constitutes a 'community' and with rights of access to resources poorly defined
- There is utter disregard for traditional knowledge systems in developing SMPs
- Inventories rarely give adequate treatment of NTFP resources

1.6.3 Financial barriers

Financial barriers are the most widely expressed constraint by informants to this study, yet remain the most ambiguous to analyse or address. The barriers below focus on why finance does not come easily to community forest businesses, despite the opportunities.

- Financing community forest-products value chains is complicated by the deals between different partners which are unlikely to be sustainable (or even formal) over any length of time.
- The financial analyses inherent in SMPs and based on projected timber sales have invariably turned out to be very inaccurate (ie inventory data is poor or even falsified). Not only does the market require only a short list of species, but price fluctuations and lack of long-term supply contracts negatively impact the cash flow of community forests.
- Community forest operations (including the laborious annual approval process) have not been designed to respond to the classical modus operandi of existing financial instruments: banks, credit unions, micro-finance institutions etc.
- Community forest entities are not *de jure* private enterprises (according to OHADA), but entities for community development (non-profit making), therefore attracting private mutual finance has been problematic.
- The value chains of community forest businesses remain very poorly defined and structured vis-à-vis classical businesses, making it difficult for private investors to fully evaluate risks or select and fund viable links for mutual benefits.
- Financial support to community forests as a whole has traditionally emanated from non-profit sources (government and international organisation) and not from private business with a mutual growth agenda. Finance from NGOs has often lacked the empowering effect of instilling accountability and efficiency, but have instead disempowered, frustrated or exploited (as with some private timber operators).
- Only recently have some community forests adopted the use of business plans with some financial analyses and planning. As a result, managing profits and loss has been non-existent and audited accounts wholly impossible.
- The lack of scale combined with the small size of CFs, a weak/narrow resource base and infrastructure and technology challenges have rendered community forests in their entirety as high-risk and non-viable businesses.

1.6.4 Barriers related to relationships with buyers

From a revenue perspective, the national timber market only absorbs a short list of species, and this limits CF cash flows. Although for sustainability purposes, a wide range of species are approved for exploitation, only a short list (maximum of 10 species) are regularly demanded by the markets (Lescuyer *et al.* 2017).

From a legality standpoint, CF struggles to feed the legal timber market because of the unfair administrative burdens described above. Timber declared to be of legal origin (largely from industrial mills) represents only between 12 and 18 per cent of the volume sold internally. Some analysts estimate timber originating for CFs to be over 90 per cent illegal (SAILD and FUGIRFOC 2018). Some experts (Nzoyem *et al.* 2010; Cuny 2011) following CFs for several years, estimate that CFs are incapable of producing more than 60m^3 of sawn wood per year through legal means. This weak traceability has a

strong negative impact on CFs in terms of monitoring their assured cash flow through the value chain and especially in performing credible cash-flow forecasts.

So, although there is market potential, greater certainty is required in tracing CF products from their source to consumption. Other studies and analyses (SAILD 2017; SAILD and FUGIRFOC 2018; Fern and CED 2018) identify using traceability tools for legally exploited timber products from CFs remains problematic and ineffective, especially those used by the CFs themselves. The reasons stem from CF management units' lack of control over their own value chains, as much of their production is contracted out to private-sector partners (who make most of the profit – thereby robbing communities of the incentive to enforce allowable cuts). Some CFs are currently putting in place new, community-based verification and tracking systems to increase and control supply of legal timber to markets (SAILD 2017).

CFs also continue to face logistical difficulties due to lack of appropriate equipment. For instance, despite the heavy financial costs involved in acquiring CAEs (estimated at US$4,000; SAILD and FUGIRFOC 2018) only a limited number of certified CFs actually report effective exploitation of timber. Nevertheless, despite officially reported 'no operations' due to numerous logistical challenges some previous studies on forest illegality focusing on CF timber value chains (Enviro-Protect, 1997; Cerutti and Tacconi, 2006) were still able to identify significant quantities of non-compliant timber products (in cities and towns) as originating from CFs. They deduced that some CFs always found a way to allow exploitation without going through the process of CAEs, which they argue remain costly, but may or may not lead to net revenue benefits.

On the other hand, VNTFPs used for foods, spices, medicines and other diverse purposes, including rattan for furniture, often find lucrative proximal markets and can help make up for timber uncertainties. Unfortunately, the VNTFP sector does not currently enjoy year-to-year monitoring like timber (based on SMPs). Furthermore, creating production inventories of VNTFPs (oils, fruits, fibre, kernels, leaves etc) continues to pose serious challenges to local capacities due to the diverse nature of products.

1.6.5 Barriers related to bureaucracy in the policy environment

Community forests are a deliberately bureaucratic instrument of forest policy. Consider the many steps that CFs have to go through:

- Notification for community sensitisation (based on the pre-emptive Order No. 0518/ MINEF/CAB dated 21 December 2001)
- Creation of legal entities (Article 28(3) of the Decree No. 95/531/PM of 23 August 1995)
- Notification of consultation meetings (Article 28(1) of the Decree)
- Start of the attribution process (Article 29 (1)
- Forest reservation, provisional forest management agreement, approved draft SMP; submission of final management plan and management agreement
- Acquisition of annual operational plans and exploitable volume certification (Article 96 (2) of the Decree)
- Transportation authorisation
- Lumberyard pass
- Notification of exploitation letter
- Exit authorisation
- Certificate of origin (for NTFPs)

It goes without saying how serious a constraint to CF business all this paperwork can be for communities in remote areas. It is noteworthy that although Forestry Administration services are supposed to be provided at no cost to communities, this is rarely the case. Therefore, the cost of the bureaucracy is

impossible to estimate with precision, mainly because these costs are not documented and tend to be ad-hoc, rendering them difficult to be factored into operational business plans.

Rough estimates (SAILD 2017) puts annual renewal of operational plans and exploitable volumes certification at 2 million FCFA (US$4,000) and average costs of each required permit, authorisation and certification linked to production at 200,000 FCFA (US$400). Overall, transportation certification and permits (not including the effective transportation cost) from, for example, Ngoyla (southeast Cameroon) to Yaoundé (capital city) are estimated to cost approximately 600,000 FCFA (US$1,200). This brings the total cost to US$5,600. Compared to the value of products, this is relatively small. But unfortunately, many such costs are upfront and therefore prohibitively high.

1.6.6 Skills and capacity barriers

The lack of technical, business and financial management skills represents a significant challenge to businesses. These challenges can be observed through individual practitioners working to build these skills or in how practitioners seek to create strategies to resolve them. A few cases are presented here.

For example, INADES is a regional NGO with a mandate to work with community groups, including community forests, to alleviate problems with business and related technical skills. INADES is working under the CoNGOs project with a number of other NGO partners using the market analysis and development methodology (MA&D) to achieve this. INADES also works as a facilitator for the Federation of the Union of Common Initiative Groups and Community Forests of Haut Nyong (FUGIRFOC, comprising over 130 members) in the heavily forested administrative division of the Haut Nyong (East Cameroon). The main task involves direct training of CF members and convincing them to invest in technical and related skills development.

However, technical and related skills gaps are not limited to FUGIRFOC members. This is partly captured by the position paper SAILD and FUGIRFOC (2018) delivered to the Brazzaville regional conference on participatory forestry. The conference met in May 2018 to develop a roadmap or '*feuille de route de Brazzaville*' (FAO 2018) for participatory forestry in Central Africa. The paper identifies and underlines technical skills development, and related support as perhaps the most important constraint to be addressed in community forest practice. In the final communique of the conference, eight priority constraints to be addressed at regional level as a part of the roadmap (FAO 2018: 12) pertained directly to addressing gaps in technical capacity, skills development and technical support to community forestry (points 4, 6 and 7).

Research is also preoccupied with developing community forestry skills. ICRAF (an agroforestry research leader, implementer of the DFID-supported Dryad project, and a partner to the CoNGOs effort) is working specifically to address gaps in technical skills and business and financial management to help establish viable community forest businesses.

In a related event in July 2018, a follow-up workshop to the *feuille de route de Brazzaville* was held in Yaoundé, Cameroon to develop advocacy tools for participatory forestry in Cameroon (Fern and CED 2018). The participants of the workshop also reviewed the last 20 years of community forests in Cameroon. Of six consensus actions to alleviate constraints faced by community forests, four pertained to technical support, and comprised:

- Entrepreneurship development and structuring of products value chains
- Valorisation of community-based traditional knowledge systems
- Strengthening technical, financial, organisational and technological capacity at community level, and
- Evaluating appropriate technical and material support for products diversification and value addition.

Finally, in their work investigating the vertical integration of community forest business in Cameroon, Ezinne de Blas *et al.* (2008) made this deduction 'Inappropriate, insufficient or short-term assistance may be worse than no assistance at all'. This probably best captures how technical support and others should be viewed. The implication is that the level of commitment of any external support has to be sufficient to

allow the recipients to develop enough experience to successfully participate at different stages in the value chain. Further, this view is consistent with other well-established principles of development aid (Eade 1997; Sayer and Campbell 2004), and should be a warning for development agencies and NGOs considering supporting community forests, especially for incubation projects. Other authors (Cuny *et al.* 2004; GECEC 2006) who have studied the role of external assistance from NGOs and international organisations, have come to similar conclusions: that empowerment and sustainability are to be sought over dependency on external assistance – however well-meaning that assistance is.

1.6.7 Barriers related to market reputation and branding

Market reputation here refers to the perception of buyers about the image of community forests as a business, and how well or badly the entity has marketed itself or has been marketed over the past two decades. Within these parameters, community forests have not, unfortunately, scored very highly, suffering from low reliability, poor product quality, and few perceived social or environmental benefits. The reputation of CFs can be considered a significant constraint. This reputation partly explains why major international organisations are either lukewarm about getting involved or are outrightly not investing in community forests. Nevertheless, for reasons of long-term attachment to forest governance, gender responsiveness and support for indigenous peoples, some donors (such as DFID and the US Forest Service) continue to support community forests in Cameroon.

In recognition of this reputational constraint, Priority 3 of the *feuille de Route de Brazzaville* (FAO 2018) is a resolution 'to promote community forests, and other models of participatory forestry'. Similarly, in recognition of this constraint at the country level, the position paper that emerged from the follow-up conference of the Brazzaville meeting (Fern and CED 2018) resolved to render more visible the strengths and services offered by community forests and to ensure both vertical and horizontal forms of communication amongst actors and investors. They also resolved to use non-market (ecosystems services) and social benefits offered by community forests as promotional instruments, including how community forests can participate in processes like FLEGT, REDD+ and intended nationally determined contributions to the UN Framework Convention on Climate Change (INDCs) and how CFs contribute towards the Bonn Challenge and AFR100 restoration goals.

2. Existing support for community forest-business incubation

2.1 Institutional support actors who provide elements of business incubation

Our emphasis on forest-business incubation for CFs does not assume that all CFs are engaged in business, as many CFs are yet to make it beyond the attribution stages to production and commercialisation. There is a widespread perception of the need for more support and with longer-term time horizons.

In terms of support actors for CF businesses, there are two main types:

- Institutions which include business incubation as part of their statutory mandate
- Institutions with expertise and mandates for sustainable forest management, poverty alleviation or other thematic areas that are acting more opportunistically to support community forest business because it helps achieve their main goal.

We present below the main categories of institutional actors that have provided some elements of forest-business incubation in the past. For each, we provide a broad description and where relevant their geographic coverage. Their sources and nature of funding are difficult to pin down and so too, are the timeframes for the support. The timeframes of support vary and unless a project was specifically set up to accompany community forests, support tends not to have been systematic and depends on case-by-case relationships with community forests or NGOs supporting them. Nevertheless, the following summaries capture existing support systems.

2.1.1 State structures and projects

State structures and programmes that directly or indirectly support CFs as a part of their normal duties include the following: MINFOF and its programmes and networks, the Ministry of Finance (MINFI) and the Ministry of Environment, Nature Protection and Sustainable Development (MINEPDED). The Ministry of Medium-sized Enterprises, Social Economy and Handicrafts (MINPMEESA) is expected to become more involved in CFs, and so too is MINEPAT. These latter two are expected to help emphasise the business vision of CFs.

MINFOF: Except for projects, the resources of MINFOF (the leading state structure supporting CFs) are from the public investment budget (PIB) and support guidelines are part of the Decree No. 95/531/PM of 23 August 1995 of the law No. 94/01 of 20 January 1994. These are rolled out through annual work plans. Except when its competences are called upon to address specific issues, MINFOF supports CFs across the national territory and the support and facilitation are expected to touch not only the management of the forests but also all other aspects of the product value chains. In practice, such support rarely happens.

MINFOF/FESP/RFC: The Forest and Environmental Sector Programme (FESP) created just after the Decree No. 95/531/PM of 23 August 1995 is the main implementation mechanism of MINFOF. Its sources of funding are both internal and external. Internal sources have comprised: on-budget funds (based on annual Finance Law allocations) and off-budget funds (special funds for wildlife and forestry). External sources have also comprised on-budget finance (included in the Finance Law) such as funds from the Highly Indebted Poor Countries Initiative (HIPC) and other budget support funds including the World Bank International Development Association (WB-IDA), World Bank Global Environment Facility (WB-GEF), DFID UK and France's Debt Reduction-Development Contract (C2D) programmes. Off-budget finance includes basket fund contributions by DFID UK, Canadian International Development Agency (CIDA) and projects such as the Pro-FESP (GTZ). Some of these are ongoing while others have phased out. More work needs to be done at the ministry levels to ascertain the status of these funds, as well as the extent

and pathways of their support for CF and CF businesses. The Community Forest Network (Réseau de Forêts Communautaires or RFC) is a network (still existing) set-up by community forests to lobby on their behalf and is hosted by MINFOF.

MINEPDED: Created in 2004, MINEPDED is responsible for environmental and social impact assessments (ESIA), including a monitoring function, through decree No. 2005/0577/PM of 23 February 2005 and decree 2013/0171/PM laying down guidelines for EISA. If fully funded and implemented as intended, the ESIA of MINEPDED should reinforce the attainment of CF social functions.

MINFI and MINPMEESA: MINFI has been very concerned that CFs as legal entities (associations and common initiative groups etc) are not currently taxed. MINPMEESA is charged with facilitating small and medium enterprises, into which eventual CF businesses should fall. Unfortunately for the moment, the legal entities (associations, CIGs, etc) on which CFs are built are not covered under OHADA's 1997 Uniform Act. Nevertheless, in the CoNGOs project, group enterprises set up by village communities have gone down the route of registering as cooperatives with MINPMEESA and MINFI have provided advice on the tax rules that apply to them. This is proving a possible route until the legal statuses of CFs are made more appropriate.

MINEPAT is responsible for land-use planning at the national level, for public investment and the control and evaluation of development programmes. This ministry has a strong mandate and is able to carry out activities that require interministerial collaboration. Currently, the rural sector development strategy is being developed within MINEPAT, which covers the following sectors: agriculture, forestry, fisheries and livestock. Given this mandate and the status of CFs in non-permanent forests and agroforestry zones, there is a need to view CFs more as development tools, and less as instruments of forest policy. CFs would benefit from strong interministerial actions. MINEPAT may potentially, therefore, be a natural home for CF business interventions in the future.

In terms of **projects**, three past projects are worth mentioning here. Each had ambitious, though not fully realised visions. Reasons differ as to why these projects did not fully attain their ultimate goals. Documentation on them also remains scarce, and therefore, they provide only limited learning value for future CF work.

These projects include the Community-based Management of Forest and Wildlife Resources (RIGC) support programme, DFID's Capacity Building Project (CBP), and the Support for Sustainable Development in Lomié project (SDDL). All three were specifically set up to support CFs at different scales, develop necessary technical and logistical capacities and build long-term sustainability. The first two (RIGC and CBP) operated at the national level and were developed with DFID funding. SDDL had a local focus (development of the town of Lomié in East Cameroon) and was supported by the Netherlands Development Organisation (SNV).

The RIGC was set up with a timber focus and was supposed to help finance appropriate machinery and other technological inputs for CF timber extraction. However, those working on the RIGC project describe a well-designed initiative along the lines of a CF business 'incubator'. According to these assessments, the RIGC could not meet its incubation goals due to too much focus on timber, without simultaneously factoring in the weight of the administrative procedures. The RIGC project also reportedly lacked the sufficient technical leadership and necessary skills at both project and community levels required to accompany CFs. At the time also CFs were at their infancy, and neither civil society nor local communities were sufficiently organised nor trained to fully participate and absorb benefits from support.

The CBP on the other hand was more successful in helping to expand the number of community forests and served as the earliest capacity-building facility, introducing tools like Lucas Mill sawmills and other technologies. This too had a timber focus, and like the RIGC did not deliberately use a value-chain approach to properly differentiate the commercialisation process and identify opportunities. As the timber-focused approach met with strong administrative headwinds, the lack of structural diversification (a value-chain approach) and resource diversification (products and services other than timber) meant this too succumbed to the numerous constraints. The CBP later changed hands from direct DFID support, transitioning to SNV supervision, during which minor products diversification to non-timber products and commercialisation training began, albeit belatedly.

The SDDL, a more limited project in geographic scope, benefited from the Freedom of Association Laws of 1992 and helped create a number of associations, common initiative groups and a cooperative in the Lomié area. With office infrastructure and other logistics put in place by this project, a number of CFs were created, often at very high cost, and financed by General Savings and Credit East Cameroon (GECEC), a now-defunct financial credit institution it created. However, the goals of the SDDL of becoming a major driver for the sustainable development of Lomié were largely unrealised. Some of the reasons for this included very insufficient local ownership of initiatives due to lack of an exit strategy or effective 'handing over of the baton' once the project ended.

2.1.2 Non-state actors supporting community forests and opportunities for clustering

Unlike state actors, non-state actors often operate in very location-specific ways. For this reason, a clustering of CFs according to those aspects likely to influence non-state actor interventions becomes relevant. A wide range of national and international NGOs and even private business are known to be closely associated with CFs. Many of these are supporting rights-based claims to land for local communities, or the development of management plans – without a strong business focus. Their details and the relationships to eco-geographic regions are described in Table 4.

Table 4. Non-state institutions supporting CFs by geo-ecological regions

	Geo-ecological zones	Administrative region(s), estimated CFs area (Ha) and % of total for country (2016)	Operating community forest 'partner' institutions	
			International and national non-profits, networks and/or charities	**Social entrepreneurs and private entities recorded as 'partners' to CFs in the MINFOF database (4–5b)**
1	*Sudano-Sahel savannah	Extreme North and North	REFACOF, AGIR, CADEPI, ALDEPA, CIG Ribaou, CROPSEC, ACEFA	Private nursery operators, Women's Association of Cashew Nut Processors and Packers, CIG KALA MALA (reforestation)
	*Highland savannah	Adamaoua	Greenland, DRADER	Private nursery operators, honey making enterprises, dairy product enterprises
2	*Highland plateau	North West and West	MBOSCUDA, INADES Formation, IVFCam, IDF	Private nursery operators, honey enterprises, handicraft enterprises, dairy products enterprises
3	Single rainfall maximum, coastal high forests	South West, Littoral, South	ICRAF, NGOs, Forest Stewardship Council, TRC, Cameco, ERuDeF, GDA	A total of 4 private businesses involved in wood processing and transformation (not located in the community forest areas)
	Double rainfall maximum, forest margins (C/E)	Centre, East	INADES, SAILD, ICRAF, CAFER, Rainforest alliance (RA), Carfad, FOCARPE, CRS	A total of 22 private businesses involved in wood processing and transformation (not located in the community forest areas)
	Single/double rainfall maximum, hinterland high forest (E/S)	Centre, East, South	CED, Equifor, CEPFILD, ICRAF, RA, WWF, FTNS, IUCN, USFS, OAPIDE, DACEFI	A total of 33 private businesses involved in wood processing and transformation (not located in the community forest areas)

Source: MINFOF (2018) *Not part of MINFOF database but relevant to tree-based activities and systems

Notes:

ACEFA (Programme for Improving the Competitiveness of Agropastoral Family Farms)

AGIR (Global Alliance for Resilience Initiative)

ALDEPA (Local Action for Participatory and Self-managed Development)

CADEPI (Integrated Participatory Development Support Cell)

CAFER (Support Centre for Rural Women)

Carfad (African Centre for Applied Forestry Research and Development)

CED (Centre pour l'Environnement et de Développement)

CEPFILD (Circle for the Promotion of Forests and Local Development Initiatives)

CROPSEC (Regional Council of Peasant Organisations of Northern Cameroon)

CRS (Catholic Relief Services)

DACEFI (Community Development Alternatives to Illegal Forest Exploitation)

DRADER (Regional Delegation for Agriculture and Rural Development)

ERuDeF (Environment and Rural Development Foundation)

FOCARPE (Cameroonian Foundation for Rationalised Environmental Actions and Training)

FTNS (The Sangha Tri-National Trust Fund)

GDA (Green Development Advocates)

IDF (Integrated Development Foundation)

IUCN (International Union for Conservation of Nature)

IVFCam (InterFaith Vision Foundation Cameroon)

MBOSCUDA (Mbororo Social and Cultural Development Association)

OAPIDE (Organisation for Supporting Development and Environmental Initiatives)

RA (Rainforest Alliance)

REFACOF (African Women's Network for Community Management of Forests)

TRC (Transformation Reef Cameroon)

In terms of business support to CFs this can also be very specific, hence the value of analysing their eco-regional relevance. Although tree systems and associated enterprises are highly developed in the highland plateau, savannah and Sudano-Sahel areas, with big populations and markets, CF enterprise activities as we know them are not. For now, these geographies are excluded from further analyses. In terms of business support, the details of the types of support available, the institutions providing the support, and, where relevant their donors, is presented in more detail in Table 5.

Table 5. Non-state support for CF business in Cameroon by eco-region

Zones (see Table 3)	Geo-ecological zones	Selected support institutions/ projects	Main funders	Description/type of support	Geographic coverage	Timeframes for support
3	Coastal high forests **Littoral/** **SW cluster**	GDA working through AJESH (Southwest region)	New England Biolabs Foundation, Synchronicity Earth, FullCycle	Creation of CFs: Support to attribution process Diversification of activities beyond timber	Southwest region	Started 2016 (ongoing)
		CAMECO (Littoral region)	ICRAF/Dryad/ DFID	Business development Agroforestry production Financial management	Littoral/SW: Sanaga-Maritime	Ongoing
	Forest margins	ICRAF, working through CAFER (Centre region) **Forest margins cluster**	ICRAF/Dryad/ DFID	Business development: Agroforestry production; Timber marketing assistance in value chain development	Yaoundé, Centre region	2015–2020
	Coastal/ hinterland high forests	SAILD/INADES (support to CF federation) Eastern region **Haut Nyong cluster**	DFID/IIED CoNGOs project Self-funding of FUGIRFOC federation by members	Business development and access to start-up finance Facilitation of FUGIRFOC Organisational development	Haut Nyong administrative unit, East Cameroon	Ongoing,
		CAFT/ICRAF support to CFs in cooperative) Eastern region – **Ngoyla cluster**	ICRAF/Dryad/ DFID US Forest Service	Business development: Production, transformation, marketing, finance mobilisation, legal compliance, ESIAs	6 CFs (Dryad) 20 CFs in total with 4 supported by USFS: Ngoyla region of Eastern Cameroon	First phase 2018–2019 Second 3-year phase in view
		CEPFILD supports non legalised grouping (Ma'an federation is legalised **Ocean/Ntem clusters;** South	RIGC project, SNV, WWF Europe,, RA/CBFF; funding has been variable	Attribution Production Equipment Contracting Certification Conflict management	At least 6 CFs in the ocean cluster and another 6 in the Valée de Ntem	Since mid-2000s, still ongoing (intermittently)

Notes:

AJESH (Ajemalebu Self-Help)
CAMECO (Catholic Communication Bureaus in Africa)
CBFF (Congo Basin Forest Fund)
RA (Rainforest Alliance)

A rage of business and technical support is being offered across the CF landscape in Cameroon – the bulk provided by NGOs. Funding and other unforeseeable factors appear to influence geographic coverage and duration of support. However, as expected, the humid high forest and coastal forests have the greater share of funding. Details of some of the business support provided are shown in Table 6.

Table 6. Examples of specific support provided to CF businesses and perceived impacts by eco-region

Zones (see Table 3)	Support institutions/ projects	Component of value chain supported (see Figure 1)	Nature and level of investments	Number of CF businesses active to date	Perceived impact of support
3 Coastal forests Littoral/SW cluster	GDA /individual CFs/SW	**Specific inputs**: Preparations Design Compliance: Start-up logistics	Technical support and funding (generally US$ >8,000 to <10,000	4 CFs: Talangaye, Osirayib, Toko, Nguti	Affected by socio-political crisis Goal is to diversify beyond timber
	CAMECO/ individual CFs /Littoral region	Production Transformation Commercialisation	Technical support; and recent financial support of approx. US$40,000 (Dryad/ICRAF)	5 CFs: Mbanda, Bopo, Libock ; Nguimbok CFs	Contribution of agriculture and NTFP development
Forest margins cluster	ICRAF/CAFER supports individual CFs /Centre region		Technical support and recent financial support of approx. US$100,000 (Dryad/ICRAF)	15 CFs ; Njansang (spice) timber, food crop agriculture	Contribution of agriculture, NTFP development with timber playing supporting role.
5b: Coastal/ hinterland high forest	INADES/SAILD (supports federation) Eastern region: Haut Nyong cluster	MA&D	MA&D is supported partly by IIED and own funds. Self-funding of federation, relying on US$600/annum contribution by its members	A federation of 130 CFs. The MA&D approach encourages CFs to willingly take up an entrepreneurial approach	Evaluating federation model: Working with MINFOF to evaluate sustainable financing through internal timber markets
	CAFT Eastern region: Ngoyla cluster	Compliance (ESIA) Production Transformation Commercialisation	USFS: US$160,000; possible USAID support during second phase Dryad: Technical advisory	4 CFs supported by USFS 6 CF businesses	Evaluating viability of cooperative model: Impact of value addition to NTFPs

			US$100,000 (Dryad/ICRAF)	supported by Dryad	and local development
	CEPFILD (supports individual CFs and federations in South): Ocean/Ntem cluster	Preparation: Compliance Production Marketing Organisation strengthening	Technical advisory and indirect, undetermined financial grants from different donors (see Table 9)	Number directly involved in CF development not determined	Evaluate impact of border location on viability of small timber industry, etc

Decisions over what skills training should be made available to community forest businesses cannot be divorced from the history of community forests. In their action-based research, presenting the overlapping rights between traditional timber concessions and community forests (concessions 2.0), Karsenty and Vermeulen (2016) discuss the timber-focused approach to community forestry. Yet even state ministries, whose roles involve legal compliance, possess only basic technical forestry skills and rarely any business skills. Knowledge of timber extraction remains mostly with the private timber companies – knowledge that they acquire largely by doing (few have technical qualifications). Even ANAFOR (the state forest regeneration agency) is largely concerned with silviculture and forest regeneration on a pay-by-activity basis.

The bulk of trainings to support community forest enterprises provided by NGOs have lacked solid on-the-ground market experience, including basic production and marketing skills. As a result, support has often been limited to forest governance, International Tropical Timber Organisation (ITTO) indicators of sustainability or generic business skills and enterprise development etc. The results achieved so far do not exhibit successful community forest-enterprise development – although there are interesting new approaches within the Dryad programme and the IIED-INADES market analysis and development approach.

Finally, the most effective source of technical knowledge on productive aspects of community forests may be the private-forestry sector and their relevant syndicates. In Table 7, a generalised inventory is made regarding existing/probable sources of technical training and their potential value to a community forest incubation effort. Note that 'private enterprises' refers to de facto partners of community forests as recorded in MINFOF databases.

Table 7. Inventory of technical training options for community forest enterprises

	Nature of technical training service	Provider of service: state/non-state	Component of value chain supported	Status of support: ongoing/ended?
1	Legality and compliance	Private enterprises (CF 'partners), state and NGOs (in that order)	**Preparation:** Legal compliance	Ongoing, far too dominant and dominated by NGOs
2	Meeting specifications, minimising waste, diversifying products, regeneration and sustainable harvesting, land-use planning	Private enterprises (CF owners) Regional and national NGOs support some diversification, sustainable harvesting and land-use planning	**Production**: Timber, non-timber products and agroforestry, sustainability	Largely on paper (SMP) but rarely implemented. Estimates suggest >50% of timber is left in CFs. Replanting is lukewarm to none-existent

3	Equipment and tooling, market for equipment rental, food processing and preservation, recordkeeping and information management	Private enterprises (CF owners) NGOs have provided some equipment; some improved processing of NTFPs (Njannsang, Moabi); recordkeeping is beginning	**Transformation:** Market research, products, technology, energy, information	Cost of appropriate equipment is a big constraint to CFs. Absence of power limits scope of technology; recordkeeping is very weak
4	Products substitution, adding value, presentation of products, advertising	Furniture industry (national and international), private timber enterprises, retail industry/giants, professional advertisers, certification patent holders, NGOs	**Commercialisation:** Trading, competition, transportation, packaging, promotion, etc	Very minimal value addition (eg rattan in Ngoyla). NTFPs are very poorly presented and no advertising is done
5	Consumer flexibility and sensitivity, meeting own needs		**Consumption:** Meeting local, national and international consumer preferences for timber and non-timber products	Very little local use of high-quality wood. Little or no knowledge of consumer preferences, attitudes and behaviour

The notion of a permanent support hub within Cameroon for community forest-business incubation is clearly an advance over anything that has gone before. But Cameroon's CF areas are scattered and in order to make any such service efficient it would be necessary to find some way of grouping similar CF groups in different areas. Therefore, mapping existing groupings could use an eco-geographical approach with the high humid forest ecoregion. By using this method, we can easily identify three groups: coastal high forests (Southwest, Littoral and part of the South), forest margins (Centre and part of the East), and hinterland high forest (East and part of the South). Table 8 provides greater details about these linkages, participating entities and perception of the value of those linkages.

2.2 How sustainable is financial support to community forest businesses?

From an economic perspective, as long as there is a regular supply of goods and services to an existing (constant or expanding) market, then the financial sustainability of businesses can be assured. If the support to the CFs emanates from that market-centric approach, such as where private enterprises are directly linked to CFs (eg the 22 CFs in Haut Nyong cluster or the 33 CFs in Ngoyla cluster), then some form of financial sustainability can exist. The details of the analyses for the basis for financial sustainability of CF business incubation are presented in Table 9, which examines the possible sources of finance, fees, value addition, and public and private funding. It illustrates the challenges as well as a few opportunities for longer-term action, especially in mobilising third-party investments.

Table 8. Mapping linkages between CFs and services which support their value chains

Typologies of linkage	Description of linkage (eg initiator, timeframe, etc)	Examples of participating CF business and entities	Perception of value of the linkage to value chain (especially to women's empowerment)
CFs to other CFs	Three self-initiated active cases are recorded: the CAFT cooperative, FUGIRFOC and Ma'an federations (CAFT is the oldest).	CAFT comprised of 20 CFs (Ngoyla cluster), FUGIRFOC comprised of 130 CFs (Haut Nyong clusters) Ma'an comprised of <5 CFs (Ocean/Ntem clusters)	The cooperatives conform to the Uniform Act of OHADA. Federations in their present form do not. Federations maintain individual member IDs, while cooperatives do not. Women's empowerment benefits from being 'separate', thus, more favoured in a federation.
CF to markets	The strongest linkages occur where the stated partners are private-sector timber businesses (sawmills, retailers etc) and where activities are initiated by the businesses.	This would pertain more to the 22 private businesses partnering with CFs in Centre and East regions (forest margins, Haut Nyong Cluster) and the 33 businesses partnering with CFs in the Centre-East-South regions or Ngoyla and Ocean/Ntem clusters.	The motivation for private businesses to link up with CFs is clearly to ensure a marketing outlet and a secure timber source. The potential for profitability and gender sensitivity is there, although under current governance circumstances monitoring is required.
CF to technical support	Getting the right technical support (see Table 11) is most likely when hands on professionals are linked to CFs (be it for timber, agriculture, or NTFPs).	Here too there are direct linkages with partnering timber businesses; entrepreneurship development support is provided through approaches such as MA&D (INADES and others), as well as agroforestry research and development (R&D) (ICRAF and others).	These linkages ensure real problems are addressed by partners with practical skills acquired by learning through doing. These however, need to be deliberately established. For the moment, partnering NGOs have advocacy skills but not the requisite technical skills.
CFs to finance	The ideal model is to establish direct linkages with partners with assured transformation, processing and marketing motives and capabilities.	Efforts are underway in the FUGIRFOC federation to use member contributions and performance to tap into the 'internal timber market' for finance	This is a good sustainability model, not yet being tried elsewhere, where finance is still in the form of external non-performance-based or non-market-based grants.
CFs to research	Transformation, commercialisation and consumption are knowledge dependent. The involvement of ICRAF and other knowledge centres is crucial.	The ICRAF/DFID/Dryad project and its targeted 30 or more CFs is a good model in which research has identified technological upgrading and value addition.	Through knowledge based research on market trends and sensitivity, consumer preferences are understood. The products base requires participatory inventories.

CFs to technology providers	Technology use is still rudimentary (chain saws, Lucas mills), yet direct links to business outlets through business partners is desired.	Urban-based partners provide technology links. ICRAF has an information system. ICRAF, RA, USFS are providing equipment support. However, sustainability remains a challenge.	Mechanisms need to be explored which motivate business partners to become more creative and ambitious, to embrace a wider range of technologies/products, and to reach different segments of the community (gender responsiveness).
CFs to administration and decision makers	In principle, the law offers a direct linkage to the administration and decision makers throughout the lifespan of CFs.	All CFs and partners are expected to participate; although upfront logistical costs (travel and living expenses) remain important constraints.	Recent assessments show unfortunately that, as a result of the cost of this linkage, some CFs and partners view the administration more as an adversary than ally (Fern and CED 2018)
CFs to advocacy and lobbying by CSOs	New opportunities and constraints are emerging with government and international policies. CSOs exist to help make sense of these dynamics.	Almost all CFs are linked to at least one CSO and many to more than one. NGOs 'follow the money' and activities while the money follows opportunities and problems.	CSOs are linked to CFs and use their skills to improve understanding of policy, markets and technology by CFs. Gender can fall through the cracks of government policy and CSOs are excellent support mechanisms.

Table 9. Financial sustainability and options of existing supporting institutions

Typologies of institutions/ entities	*Options for financial sustainability and sources*				
	Client fees	***Adding value/selling client products***	***Bi/multilateral donor/project funds***	***Public funds***	***Third-party investment funds (loans)***
1 ***State***	N/A	A parastatal with mandate	A more viable version of the RIGC project	Administrative supervision (continuous)	Feasible if legal status of CFs changed to fiscally liable businesses (OHADA)
2 ***International and national non-profits***	By CFs in a federation; (annual) FUGIRFOC	N/A	To strengthen self-financing federations/ cooperatives	Subventions via finance law to CSOs supporting CFs	N/A
3 ***Private businesses/ investors***	CFs agree to support various own specialised trainings	Eg. 22 CFs (Haut Nyong cluster) or 33 CFs (Ngoyla cluster)	Supporting enterprise can be incentivised (eg certification, fiscal instruments) for greater corporate social responsibility (eg gender) through support to CFs		Possibility for strengthening viable private partners working with federations and cooperatives

Notes: Grey areas correspond to actual/existing mechanisms. White areas correspond to potential actions.

2.2.1 Typology of costs related to supporting start-up and launch of CF businesses

To assess forest-business incubation options, it is useful to assess the types of costs that are required to support the start-up and launch of CF businesses. This can be best appreciated by comparing the efforts of a local cooperative (an NGO without significant resources), with that of a project, set up specifically to support CFs. The comparison here is based on working observations and personal relations, and describes the experiences and results achieved by CAFT Ngoyla in East Cameroon and the SDDL project in Lomié, East Cameroon). CAFT was a cooperative created with support from the SDDL project. The milestones used in this comparison are largely determined by the MINFOF CF manual of procedures – a policy instrument that cannot be avoided. Although the milestones are identical, the details of each process can vary for different CFs during implementation.

The details of this comparison are presented in Table 10. The comparison of the two processes are based on their inputs at start up, and some achievements. It highlights the operational advantages that can be experienced through locally grown business incubation initiatives, compared with project-driven ones.

Table 10. Costs and inputs in relation to CF business start-up and operation

	Statutory milestones	*With comparison of CAFT and SDDL experiences*		
		Costs/inputs required	***Strategies used by CAFT and SDDL project***	***Observations of relative; success/failures of those strategies***
1	**Sensitisation**	Expert time, living costs, travel, meetings, reporting, involvement of local administration.	CAFT staff are local, SDDL are external. Both undertook community mobilisation with final engagement with authorities.	CAFT's was by far cheaper. Lower expectations, wider/deeper reach and better owned locally.
2	**Create legal entities**	Expert time, facilitation, consultation meeting minutes, travel.	CAFT used its own experts and combined meetings with other objectives – whereas SDDL worked from scratch.	CAFT simultaneously created 9 entities and SDDL created 5. CAFT's longer-term vision was better than a project-driven one.
3	**Consult with legal entities**			In CAFT's case, legal entities were the communities themselves, so no additional consultations. Minimum required involvement of administration to keep costs down.
4	**Attribution of CF**			
	- *CF is reserved* - *Provisional management agreement* - *Draft SMP* - *CF is attributed*	Expert inputs: - Stamped request/ objectives of CF - 1: 200.000 map situating CF (no overlaps/ conflicts) - Valid legal status document of CF and internal rules and regulations - Description of CF activities (draft SMP) and activities including: • CV of manager • Consultation meeting minutes	- SDDL used outside experts, whereas CAFT used local experts, integrated detailed community mapping with modern techniques. - CAFT used insider knowledge, forest administration/concessions, PAs and reserves etc, existing projects, students, etc. - Contiguous forests are more efficient.	CAFT submitted completed dossiers of 9 contiguous CFs and achieved attribution at a fraction of the cost as SDDL (which achieved the same for 5 CFs).
5	**Final SMP and FMA**	Expert inputs: - Information meeting - Technical training for field data collection - Data collection and analyses	- CAFT did not duplicate costly meetings. - Used plenty of project, student, and secondary databases.	CAFT SMPs were approved almost in one lot and then received FMAs. The overall time taken between CAFT and SDDL was not very

		- Training on SMP write-up - Finalisation of SMP	- Used local knowledge of resources/disposition. - Did not 'reinvent the wheel' – used past SMPs and expert input for final write-up.	different but the number of CFs and especially the costs were different.
6	**The CF business:** The SDDL project with its focus on timber has long since closed down. CAFT (which had a broader community development agenda) continues, but it is only now, with support from USFS and ICRAF/DFID/Dryad, diversifying its production. From this point on, CAFT is supporting the Association of Community Forests of Kadey (ASFOKA) for timber, and the regime is managed by contracting out the work to a private operator. However, ASFOKA are responsible for the costs.			
	***Implementation of SMP and FMA* (field services):** - CAE - Transport authorisation - Lumberyard pass - Notification of exploitation - Exit authorisation - Certificate of Origin for NTFPs Monitoring, controls and applicable taxation	According to the ASFOKA chief of operations, Gbampeng Bonaventure (Fern and CED 2018): '*The forestry administration does not play its statutory role; the field services are not free; of 27 CFs, only 3 obtained CAEs. Even these, with all investments and equipment, are unable to begin business activities.*' The applicable tax (felling tax) is currently being contested by CFs.	It is impossible to carry out CF business activities without 'paying for these services, supposed to be free of charge'. They are arbitrary (the basis for illegality) and better mastered by private operators, at the expense of communities. Reliance on them by CFs has been a 'forced mitigation strategy'.	These constraints lie at the root of 'failures' experienced by CFs (and perhaps the reason CAFT never went into timber exploitation in the traditional way). Meanwhile, the SDDL may have been spared by its closure. Projects (RA, CED, SAILD, USFS, ICRAF/Dryad and others) have made a great effort, but their 'full costs' cannot be factored in. In fact, in some ways, their successes, through key lessons, defeat the very purpose of sustainable community-based businesses.

2.3 Challenges for support institutions

A range of challenges face institutions supporting CF businesses. The main sources of support come from four categories of actors: state, NGOs, the corporate/private sector and collective FFPOs (or the locally controlled private sector). It is possible to map these challenges in terms of management, production factors, governance and other enablers comprising: motivation, resource tenure, funding, logistics, security, personnel and skills, political issues and governance. While private-sector actors are concerned primarily with profit issues, the state is concerned with citizen wellbeing, sustainability and future revenue etc. NGO interests tend to be based on their core focus, often of their donors – governance, advocacy, knowledge, development and/or conservation etc. A more detailed analysis of these issues is presented in Table 11 below.

Table 11. Assessment of challenges faced by support institutions and projects

	Typologies of challenges by domain of support	*Description/nature of perceived and operational challenges faced by institutions/projects supporting CF businesses*			
		State	***NGOs***	***Corporate businesses and investors***	***Collective FFPOs***
1	Motivation	Community development and sustainable forest management		Profit and sustainable revenue and access to resources	Profit, community development and sustainable forest management
2	Resource tenure	Reluctant to confer full property rights to communities	Pushing for full property rights for communities	Interested in regular supply from legal CF areas	Pushing for full property rights for member organisations
3	Funding and numbers of potential clients	The state uses central revenues to support CFs which in turn strengthens economy	Unsustainable project-based financing, hostage to donor fads	Commercial finance used to support CFs to guarantee product supply	Profits from aggregating, processing and marketing product could be used to finance business incubation
4	Logistics and communication	Supervision costs without taxation are high for the state	Difficult operating environments depending on where NGO is based	Poor roads, energy and technology are challenges but may be part of routine business operations	Location of producer organisation is probably closer to producers – reducing logistic costs
5	Security of operating environment	Adds to budget costs borne by state	Hypersensitivity and vulnerability to security issues	High cost of security to protect investments	Threatened by other private-sector actors
6	Available staff and skillsets	Staff shortages, forced to count on 'partners'	High cost of specialised staff and high cost/benefit ratio of staff deployment	Usually have business skills in house to some degree and relevant technical advisors	Usually have business skills in house – depending on the degree to which any collective business is working
7	Political issues	Seeks a balanced geographical spread of CFs across national territory	Concerned with resource tenure, roles of elites, improving enabling conditions for business		Part of their job is to represent the interests of their members politically
8	Gender issues	Full implementation of ESIA (MINEPDED), insufficient corporate social responsibility (CSR) by private sector, and responsiveness of community organisation and decision-making processes		CSR and role of CSOs	Can be favourable to gender responsiveness if built on producer organisation's articles of association

3. Options for enhancing business incubation support

3.1 Current institutional opportunities

Given the history of CFs in Cameroon, successful business incubation should preferably be service- and outcomes-oriented, and not solely profit maximising. Although both are important, the outcomes for CF businesses (and not just the upkeep of the incubation services) should be the priority. This can prove a challenge to profit-oriented private-sector models of business incubation.

In assessing opportunities, it is possible to consider at least four institutional actors: the state, NGOs, private-sector (such as financial institutions, businesses, venture capitalists, social entrepreneurs) and democratic forest and farm producer cooperatives, associations or federations. These options are further developed in Figure 4, using a value-chain approach to describe the relevant associated services, including selected end products, for illustrative purposes.

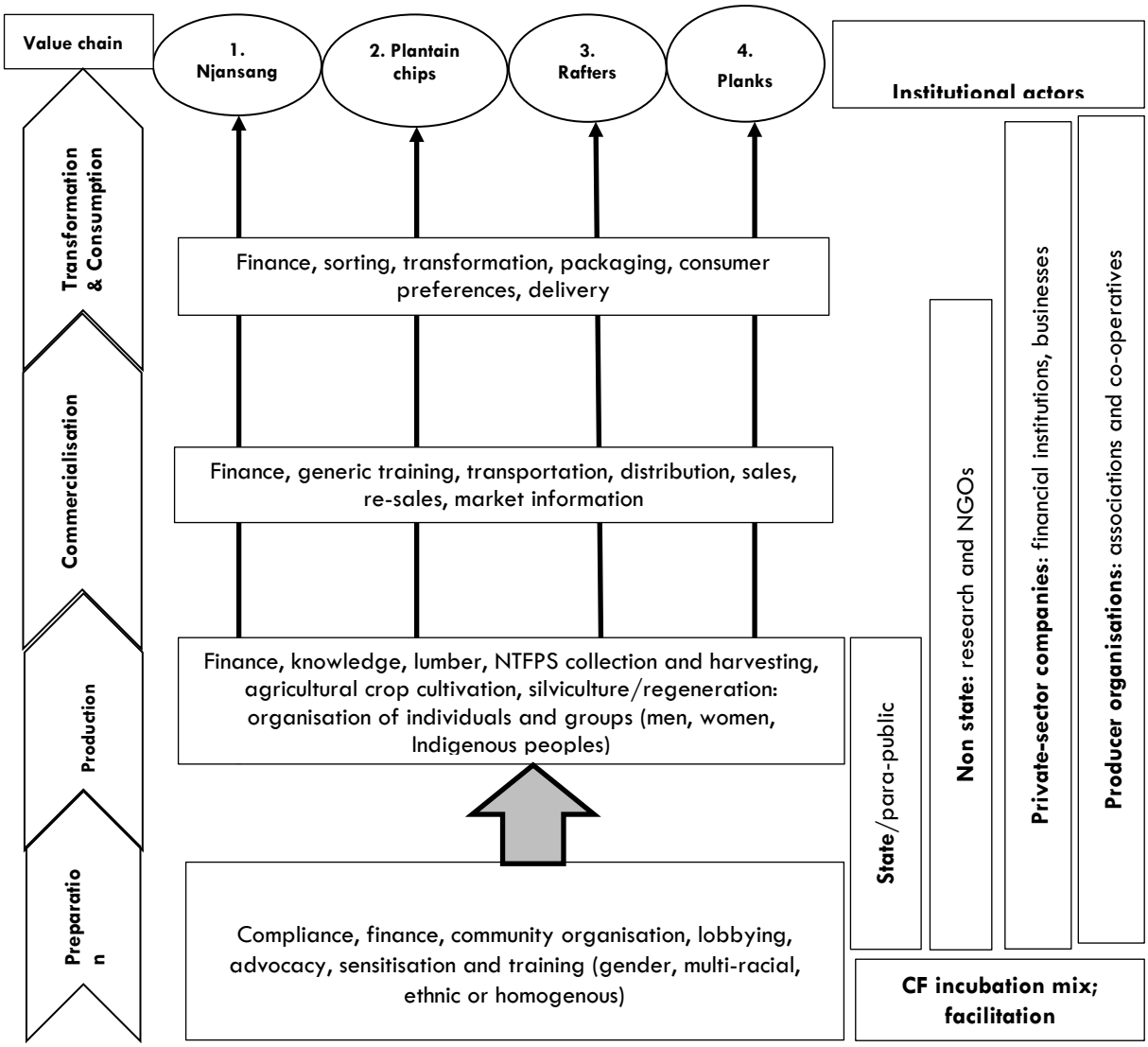

Figure 4. Options for facilitating incubation of CF business in Cameroon

From a national perspective (and in line with the definition of forests and different eco-geographical regions) we suggest that separate CF business clusters and forest-business incubation approaches are developed for each of the eco-geographic clusters that have been identified: the savannah, high plateau, and humid high forests (divided into coastal high forest, forest margins and hinterland high forest regions). Each eco-region can thus be served, and each according to need and opportunity. Irrespective of the institutional opportunities for incubation that may exist, options for enhancing incubation should reflect the diversity of the community forest opportunities. The option, ultimately, of housing forest-business incubation within forest and farm producer associations or cooperatives has distinct advantages, because value-added processing and marketing functions could generate profits from which incubation activities could be developed. Indeed, there would be a vested interest for a second-tier producer organisation to improve the business skills of its first-tier members. Nevertheless, at this early stage, an immediate priority is to incubate (through state, NGO and private-sector actors) the types of clusters of community forest producer organisations that might ultimately associate or federate.

3.2 Future business capacity options and needs

Opportunities and prospects for business incubation exist in Cameroon. However, it is critical at this stage not to seek generalists, but to engage with more specialised entities with a track record of work in the forest sector – and preferably with entities that are actually selling forest products on the market. There is always the possibility to link specialised business-incubation service providers (who possess the necessary expertise) to formal training in forestry, industry and agriculture. A training-of-trainers approach could be used to develop basic skills in market research, business development, financial management and marketing. Building on the existing in-country programmes providing such training (eg the TMP-ICRAF-Dryad project cluster or the IIED-INADES-CoNGOs project cluster) would be an obvious first step.

Unfortunately, the fastest growing business-incubation sector has been the urban tech sector, rather than anything in rural areas. However, upon examination of the services some of them offer, adaptation to the needs of CF business incubation should be feasible. In Table 12, a detailed analysis is carried out of the opportunities and prospects for formal business incubation in Cameroon.

Table 12. Opportunities and prospects for formal business incubation training

	Existing formal training institutions for business incubation	*Relevant skill-sets training offered*	*Training gaps needing to be filed in formal institutions*
1	**Agro-PME Fondation:** *BP 10087 Yaoundé-Cameroun Nouvelle route Chapelle NGOUSSOU Tel: +237 243 65 75 57/243 65 75 55/222 21 94 23, www.agro-pme.net Email: agpme@agro-pme.net*	Project design, implementation, training in business creation, implementation of tools for management and development, transfer of start-up support methodology, business plan, financial intermediation, development of innovative financial services (for project financing and financing of support services).	- Forestry techniques; silviculture - Agronomic techniques - Food-processing techniques - Valuing environmental services - Handling machinery - Trading
2	**Douala pilot incubation centre:** Supported by CCIMA	Study of project and restructuring: diagnosis, strategic vision, development plan.	

3	**Business incubator 'talent seeds' (GDTs):** Supported by SIAD, COFIDES Nord-Sud, AFD, EU	Transfer of support tools for promoters of business creation projects. Establishment of a project finance fund.	- Advertising - Bookkeeping. Structures like INADES, SAILD, Catholic University Institute of Buea (CUIB) and other specialised institutions can complete such follow-up.
4	**PISP** (Yaoundé Youth employment Programme) Supported by MINFI	Project design; selection and training of young entrepreneurs with ideas of business projects; support for business plan and business creation; project financing and post-creation support.	
6	**LICE (Laboratory of Engineering of Business Creation):** Supported by ENSPT/MINPOSTEL	Project design, technical assistance for the implementation of the project, transfer of tools.	
7.	**Eurobiopark** – Douala Enterprise Incubator: see http://incubateurdouala.e-monsite.com/en/	Eurobiopark has signed a memorandum of understanding with the Institute of Technology in Douala, Cameroon (ISTTI) to put in place an enterprise incubator. This is a space reserved for project leaders within which they can be supported and followed up. Similar entities with comparable missions include Active Spaces, Jingo Hub and Oasis. Their emphases are often on tech start-ups but they can quickly adapt to any sector with some back up from longstanding professionals in the farm and forest fields.	

3.3 Possible funding sources for CF business incubation in Cameroon

Funding options for CF business incubation are critical and would require a combination of traditional and innovative options. There are existing opportunities such as regular and even little-known state funding opportunities which need to be brought to the surface. Federations like FUGIRFOC are experimenting with client fees and mobilising funding from the internal timber market. There is also the traditional relationship between the private timber sector and CFs which could be developed as a more formal business incubation approach.

Finding ways to design forest-business incubation such that it could link directly to financing from FLEGT and REDD+ would be a significant step forward. Either way, performance appears to be an underlining requirement in any successful long-term funding mechanism. A more detailed analysis of these options is made in Table 13 covering descriptions, their prompters and possible modus operandi.

Table 13. Assessment of existing options for financing CF business incubation

Sustainable funding options	Description of existing/comparable funding frameworks	Operational modus operandi for funding	Example of how fund may operate (including references)
Market-based performance funding			

	Client fees	Self-funding by the FUGIRFOC federation members. Not necessarily performance based but unlikely to pay dues without activity.	These are statutory dues payable by each of the current 130 members of the federation.	These are operational funds of the federation enabling it to carry out incubation-type activities like training, commercialisation and compliance support etc.
	Adding value/selling client products	Possible funding from private-sector operators involved in the internal market for CF timber.	Mechanisms are under reflection between INADES/FUGIRFOC MINFOF and timber syndicates.	Internal timber-market actors could pay a pre-agreed performance-based contribution to CFs
	FLEGT	None yet.	Possibility of funding depends on issuance of FLEGT licenses.	As market incentives for legally sourced timber
Public sector				
	Government (public-sector funds)	ENSPT/MINPOSTEL, MINFI, CCIMA.	No specific operational modality mentioned. Likely linked to lobbying and being registered for training programme.	Training and capacity building in business incubation. Past experience pertains to beneficiaries of training organised by Agro-PME Fondation, Douala.
	Bi/multilateral donor/project funds	SIAD, COFIDES Nord-Sud, AFD, EU, Eurobiopark.		
Venture funding				
	Private sector: (third-party investment funds eg own funds, borrowed from lending institutions etc)	This is the most developed and widespread form of funding for CF exploitation. No evidence yet is used for incubation activities. This is the basis for negotiations between INADES/MINFOF and timber syndicates	Prompter is likely to be based on participation by CFs. Feasibility and modalities are still under negotiation and discussion.	This fund would be ploughed back into improving CF performance, such as funding NTFPs, agriculture development, training etc.
Ecosystems services conservation-based funding opportunities				
	REDD+ (payments for ecosystem services)	WWF PES scheme (Ngyola-Mintom), South East, Cameroon.		WWF Central Africa Regional Programme Office (WWF-CARPO) set up a PES micro-project in four villages, based on the Plan Vivo methodology. 4 CFs were created in the process
	Bonn Challenge AFR100	Likely to be applicable to northern regions, where Cameroon has pledged to restore over	Prompter here is likely to be profitability assessment of a	Investments (bilateral, multilateral or private sector) could involve incentives (to

	12 million ha of degraded lands.	restoration intervention.	include incubation for community-based forestry).
Carbon offset funding	None observed	Based on mutual standards of performance.	Likely to be applicable to landscape restoration projects.

4 Conclusions

4.1 Options for better community forest-business incubation

In this concluding section we ask, what are the main, realistic options for improving community forest-business incubation? A reasoned emerging philosophy can be stated thus: that community forest-business incubation is likely to be sustainable in the long-term if it is tailored to the eco-geographical and social context, is successful in empowering community entrepreneurship, is structured to address specific links in one or more value chains, and is designed or implemented so it can feed on its own performance. Based on the evidence put together in this report, the following are some suggested options to achieve successful CF business incubation in Cameroon.

4.1.1 Adopt a national approach promoting CF in different eco-geographic regions

The nationally relevant definition of forests in Cameroon presents an opportunity to pursue a national approach – with dedicated community forest business incubator models applicable to the different regions. Despite the current dominance of CF in sparsely populated, high forest, lowland regions, constraints associated with low population density but high natural resource endowments are less likely to be experienced in the Savannah and high plateau. Natural and assisted tree regeneration, active planting and commercialisation of products other than timber, are growing faster in the highlands, savannah and plateau. Strong market demand for energy and construction materials and the need for palpable impact on poverty and environmental restoration are driving tree based systems in the Savannah and plateau regions. Community forest-business incubation in the savannah and high plateau is also politically astute, and ties with Government policies on social, economic development and environmental management. On the other hand, a more nurturing and rights based approach may be added to existing practices in the high forest areas.

4.1.2 Clustering community forest groups and cooperatives

It is important that both Government actors and civil society organisations continue to promote and facilitate the development of clusters of existing CF groups and cooperatives (with the aim of establishing second-tier aggregator and marketing organisations). Historically, the laws of 1992 on associations and common initiative groups did not lead to the creation of most of these entities. The law simply legalised already existing socio-cultural entities so they could access resources and instruments that required legal entities. The CF management process was not thoroughly explained as it should have been, but instead appeared to have been forced down by the international community. As a result, many of these entities failed to understand the real benefits of collective action and strong organisation: sharing information and market contacts, sharing equipment and cutting costs, or improving their negotiating power through achieving a larger scale of production. Today, cooperatives like CAFT Ngoyla or federations like FUGIRFOC, and Ma'an (South Region) are only beginning to explore the need and experience the benefits of associating and linking to value addition and retail in urban centres.

Opportunities exist for such associations to act as aggregators of product and as centres for processing and value addition. As they develop more advanced business skills there will be opportunities for such associations to provide business start-up expertise and even pathways to internal financing to their member organisations. There is a strong incentive to do just that, because the better the business of their member suppliers, the more profit they are likely to be able to generate. Within the larger sample size of human talent represented by federations and cooperatives, technical training can be more beneficially directed towards youth and new start-ups that might diversify income streams. Existing forest and agricultural products syndicates will also find it more worthwhile partnering with federations and cooperatives than with individual community forest businesses. Even resources available through marketing mechanisms like FLEGT or environmental management processes like REDD+, Bonn

Challenge, AFR100 and even PES mechanisms can more meaningfully operate through federations and cooperatives of community forest businesses, which can in turn use such resources for incubation activities.

4.1.3 Adopt a more rigid value-chain approach to CF analyses

One of the disappointments of the CF approach in Cameroon has been the insufficient entrepreneurial empowerment of communities as a foundation for sustainability. A failure to deliberately structure and direct external support towards market development at all stages (preparation, production, commercialisation, transformation or consumption) has left CF groups commercially weak. It has also led to a false perception that CF is not workable. Successful incubation must link CF groups to a range of potential external services, from government authorities and finance providers to technology, research and development units. There are many ways in which value chains of CF business can be supported. Some have been described and illustrated in this report (ongoing TMP-ICRAF-DFID-Dryad, SAILD-FURGIFOC, CAFT-Dryad etc). Any incubation process must facilitate links to these multiple external contacts that can help make or break a business.

4.1.4 Institute a performance-based approach within any business incubator with rewards for positive CF market outcomes

Past attempts to support CF businesses have been project based. The end of financing has traditionally resulted in the collapse of incubation structures (eg RIGC, CBP). Although in most cases high CF business performance has been expected, the process has been overly subsidised. Community forests are businesses generating cash. Therefore, it is inconceivable for them to be dependent on non-profit funding for their sustenance. Selection processes for choosing which businesses are eligible for support need to be toughened up and any chosen CF businesses need to be rigorously screened for progress – or dropped from the system. Elements of conditional support have been built into the recent Dryad programme. Linking funding to performance of both the facilitator and the community forest is one way to achieve long-term sustainability.

4.1.5 Promote diversified value chains away from timber with strong research involvement

Without question, one shortcoming of CF business in Cameroon has been the near-absolute focus on timber as the main activity. Given the costs of timber-harvesting equipment and the need for substantial technical know-how, the focus on timber has led to a dependency syndrome on external contractors. This has not only provided the basis for disempowerment and conflicts with management entities, but also the focus on timber has led to non-inclusion in business processes. With NTFPs and other cultural services, community-owned knowledge is made use of – and the inclusion of people within the business has a much higher possibility. Community forest incubation must therefore support non-timber pathways as a strategic choice, with multiplier effects as other local people provide processing and packaging inputs, transport and other services. The role of research cannot be overemphasised. Until communities can develop a wider range of products and services, the real value of community forest timber (more of a fallback, or capital raiser) may not be truly appreciated.

4.1.6 Develop a strong network of progressive private-sector buyers involved in CF

There is a wide and extensive network of private timber, agriculture and NTFP operators. There is very little evidence that these actors with access to markets and technology are reinvesting their knowledge, skills and resources to help incubate struggling community forests. It must be in their interest to do so once this is made obvious through a combination of initiatives from the state, civil society organisations (CSOs) and other facilitators. Many are already organised into syndicates, but there has been little structured exploration of how they might reinvest support for community forest incubation. Incentives

can be provided to facilitate such networking as the benefits are likely to be great and, more importantly, sustainable.

4.1.7 Engage vigorously with CSOs and international organisations to evaluate a strong role for MINEPAT or MINPMEESA

The creation of community forests as protégés of MINFOF was a logical continuum of the notion of a state forestry which some commentators have referred to as Concession 2.0. Community forestry was and still is an instrument of forest policy, characterised by texts and decrees, by dos and don'ts. But the essential character of CF as an enterprise or business needs further reflection – which is currently not enshrined in the concept of community forests. The essentials of CF are currently not aligned at all with the OHADA Uniform Act, or of Law No. 2015/018 of 21 December 2015 guiding commercial activities in Cameroon. Little surprise, therefore, that community forest pundits are calling for a full review of the instrument, towards a more flexible and progressive regime for CFs and CF businesses. As a result, suggestions are being made to bring community forests under the purview of MINEPAT or MINPMEESA, and to situate them as a part of the rural development sector strategy (RDSS) and an integral part of the national strategy for growth and employment (NSGE), supervised by MINEPAT. Such a shift would further facilitate reforms and performance, necessary to reap the benefits of business incubation.

4.1.8 Significantly develop and promote the social, environmental and economic case for CFs

Community forests, after years of struggling, have not succeeded in attracting inward investment. Nevertheless, CFs do represent a significant achievement. Almost 2 million hectares of land are directly under the management of communities. Community forests occur in non-permanent forest estates or agroforestry zones. This means communities have greater flexibility to use the land for various productive purposes that are not possible in permanent forest estates. The interest to spread the notion of CF to the savannah and highland plateau is precisely for these reasons. Land tenure is very rigidly controlled by traditional authorities in the savannah and highland plateau, and CFs would represent one way to facilitate community access – especially by women – to land and tree resources for extended periods of time. Promoting the social, environmental and economic benefits of community forests, by using successful case studies, is likely to have a multiplier effect on support for CF business incubation.

4.1.9 Establish strong links between CFs and REDD+, Bonn Challenge, AFR100, FLEGT PES and similar environmental management programmes

As noted earlier, the scattered nature of CF businesses means that recouping costs for business training and other business-incubator services is going to be impossible. However, the outcome of CF business incubation would be more profitable, and sustainable forestry would provide a powerful incentive for local communities to guard the benefits of their standing forests. It is therefore surprising that more has not been done to link international programmes for legality and climate action as long-term sources of subsidy for forest-business incubation. This might improve its sustainability in remote rural locations. These international processes can have different and sometimes even contradictory requirements – but most would see a clear benefit from forest-business incubation if well-conceived and managed. By linking community forest performance (and incubation needs for instance) to their goals, it becomes easier to establish mutually beneficial long-term partnerships.

4.2 How legitimate are options for CF business incubation, based on stakeholder consensus?

To evaluate the legitimacy of the options for community forest-business incubation, two main consensuses seem to have been reached: one national, the other international. The national consensus has involved a coming together of national community forest practitioners and actors, to discuss principal problems and ways forward for community forests in Cameroon. The international consensus has been developed from international dialogue series that have noted the evidence on the benefits of community forest business and agreed approaches on how to go about investing in locally controlled forestry (Macqueen *et al.* 2012) not least for forests in Central Africa. Both consensuses indicate that better community forest-business incubation is a strong priority in the region.

Furthermore, various individual experts and institutions (Minang *et al.* 2017; SAILD 2017; FERN and CED 2018) have reinforced these positions in their different commentaries and work on community forests. A summary analysis of the alignment of concluding options for community forest-business incubation, with regional, national and other positions and priorities is developed in Table 14.

Implementing these options for incubation will occur within specific policy, funding or governance spaces. Therefore, risks of failure exist and these should be considered beforehand. An analysis of likely risks in rolling out options for CF incubation is summarised in Table 15.

Table 14. Alignment of options for incubation with key priorities

	Some consensuses and references	*The major conclusions of the consensuses/references*	*Alignment with conclusions (4)*
1	**International:** *'Towards effective participatory forestry within the framework of a 2030 Vision'* 'Feuille de Route de Brazzaville' (Brazzaville Road Map), FAO (2018)	• Define a clear vision for participatory forestry and set objectives for 2025	All
		• Create a favourable institutional, legal and regulatory environment for participatory forestry	vii
		• Promote the community forest model as well as other participatory forestry approaches	viii
		• Ensure adequate follow-up of CF by state and other technical services	vii
		• Promote innovative technologies as well as local knowledge in community forestry	vi
		• Facilitate entrepreneurship in participatory forestry initiatives	ii, iii, iv, v, vi
		• Strengthen the capacity of actors supporting indigenous peoples and local communities	v, vi, vii
		• Ensure regular monitoring and evaluation of the performance of participatory forestry	iii
2.	**National** Contribution note by FUGIRFOC (federation of 130 CFs in Eastern Cameroon) on participatory forestry in Central Africa. Position	• Define a clear vision and objectives for participatory forestry	All
		• Promote the image and model of community-based participatory forestry	viii
		• Adapt support to community forestry to local realities and capacities	i, iii
		• Strengthen the legal framework for community forestry	vii
		• Clarify the modus operandi for free technical services/taxes for which communities are entitled/liable	vii
		• Rationalise the requirements for certifications and authorisations to lighten the process	vii, ix
		• Intensify legality mechanisms to diminish corruption	vii

	paper, SAILD and FUGIRFOC (2018)	• Strengthen the technical role of the state and build mutual trust with CFs	vii
		• Promote and strengthen federations and cooperatives and their ability to provide services to CFs	vi
		• Better define the needs of CF to deliver more effective support	i, ii, iii, iv, v
		• Promote the use of innovation and new technologies (eg for traceability)	vi, ix
		• Facilitate exchange of lessons and experiences at all levels	i, vi
3	**National** Fern and CED (2018) Workshop on CFs: levers for sustainable and equitable management. Mvolye, Yaoundé 2018	• Ratify a new forestry code adapted to and more expansive vision of CF, develop and apply guidance on how to implement the code in practice	All
		• Develop and adopt simplified procedures for setting up CF businesses	vii
		• Fully recognise the tenure rights of communities	vii
		• Establish stronger links with the private/business sector	ii, iii, iv, v, vii
		• Put in place a mechanism to value traditional knowledge associated with use of local resources	i, viii
		• Reinforce technical, financial and organisation capacities of CFs	v, vi, vii
4	**Expert** Minang *et al.* (2017) Community forestry as a green economy pathway: two decades of learning in Cameroon. ICRAF.	• Define simplified, adaptable corporate institutional frameworks for CFs	vii
		• Engage more with MINPMEESA and MINFI	vii
		• Consider increasing the size of community forests	i, iv
		• Enable co-investments from REDD+, Green Climate Fund, Eco-certification etc	ix
		• Use incentives to address governance challenges	iii, ix

Table 15. Anticipated risks of CF incubation options and possible mitigation

	Options for CF incubation	Risk assessment	Possible mitigation
1	Adopt a national approach by promoting existing models of community forests in the different eco-geographic regions	Already in application	N/A
2	Adopt a more rigid value-chain approach to CF analyses	None	N/A
3	Institute a performance-based rewards mechanism for specific links in CF products value chains	Performance in specific links may not depend entirely on CF managers	Emphasis will be on CFs which have gone beyond start up (preparation)

4	Promote diversified value chains away from timber with strong research involvement	Insufficient investment funding to move beyond gathering, collection and basic processing	Internal timber market, federations, cooperatives, research; other technical and financial partners are strongly encouraged to support diversification
5	Develop a strong network of private-sector actors (timber, NTFPs, agriculture) involved in CF	Private-sector actors may be unwilling to engage	Federations, cooperatives and ministries are encouraged to consider different incentives
6	Promote and develop skills and technologies through existing CF federations and cooperatives	Federations and cooperatives lack funds and willingness to invest in skills and technologies	They need to be supported and encouraged to do so by experts, state, CSOs etc
7	Engage vigorously with CSOs and international organisations to evaluate a strong role for MINEPAT	MINEPAT is unwilling to consider hosting CFs	Possibilities also exist to engage with MINPMEESA and MINFI directly, though these are more cumbersome
8	Significantly develop, improve and promoting the social, environmental and economic case for CFs	None – just better communications required	N/A
9	Establish strong links between CFs and REDD+, Bonn Challenge, AFR100, FLEGT PES and similar environmental management programmes	REDD+, Bonn Challenge, AFR100, FLEGT PES may not be viable in the long term	Continue to use market mechanisms while building the case for support from short-term programmes such as those cited left

4.3 Recommended next steps

In terms of next steps for community forest-business incubation in Cameroon, it all depends on leadership. An initial process of incubator establishment must be led by a credible and well-known donor organisation or technical partner. Given the low state of CF associations in Cameroon, it would probably need to be driven in the first instance by a lead market agency (perhaps a business-oriented NGO) that could provide business incubation to potential CF suppliers of its own products. TFRD with its commercial arm TFFC would be one promising option. Everyone, especially the government of Cameroon, is aware that CF in Cameroon has been (and to a significant extent remains) a product of DFID UK support. With this leadership, engagement at the national level can begin.

Putting in place CF business-incubation mechanisms would not be reinventing the wheel. Moving forward, the first step is to compress the nine options for better CF business incubation in Cameroon outlined in Section 4.1 into three strategic objectives:

- Mobilise national stakeholders for community forest-business incubation (1, 5, 6, 8, 9)
- Develop priorities for sustainable value chains of community forest products (2, 3,4)
- Improve institutional, legal and regulatory frameworks for community forest-business incubation (7)

An implementation framework would be needed to facilitate understanding of process, partners networks and expected deliverables. Table 16 provides possible details of implementation arrangements for community forest-business incubation in Cameroon.

Table 16. Implementation: partners and description of deliverables

	Strategic objectives (SO)	*Specific objectives (SpO)*	*Major stakeholders/partners*	*Strategic deliverables (processes, networks and long-term capacities)*
1	National stakeholders are mobilised for community forest business incubation	1.1. Adopt a national eco-regional approach	CF federations in each region, MINEPDED, CSOs, TFP	A national networking programme and process that contributes to the RDSS, NSGE, etc
		1.2 Engage with umbrella cooperatives and lead firms	CF federations, CF cooperatives, networks, private sector, business incubators	A demonstration process of the added value of business incubation to the needs and operations of umbrella cooperatives of CFs businesses and other lead firms
		1.3. Mobilise private-sector buyers	CF federation facilitator, private sector, MINFOF, CSOs, MINEPAT, MINPMEESA	An independent networking mechanism, linking buyers to CF enterprises and building capacity
		1.4. Promote benefits of CFs	CSOs, TFP, MINFOF, communications consultant, tech start-up	A long-term public relations and information/capacity-building programme to promote CFs
		1.5. Establish links with global process	MINEPDED, MINFOF, CSOs, TFP	A demonstration process of mutual benefits between CFs business in different regions
		1.6. Promote a value-chain approach	MINPMEESA, research, CSOs, MINFOF, MINADER, MINEPAT, tech start-up, business incubators, private sector, TFP	Analyses, information and value-links development and capacity-building programme highlighting business opportunities and needs of CF businesses
2	Priorities for sustainable value chains of community forest products developed	2.1. Conceive a performance-based rewards/financing system	MINPMEESA, research, CSOs, MINFOF, MINADER, MINEPAT, tech start-up, business incubators, private sector, TFP	A functional incentive scheme for a forest-business incubator providing credible services to CF businesses through different mechanisms including capacity building
		2.2. Promote a CF products diversification approach	research, private sector, MINFOF, MINADER, MINFI, MINEPAT, TFP	An analyses, identification and inventory database supporting networks and focused on CF products and services

		2.3 Develop obbying team to explore nstitutional, legal and regulatory framework for CF business incubation	MINEPAT, MINEPDED, MINFOF, CSOs, private sector, TFP	An institutional home with legal and regulatory frameworks supporting CFs in profitability, employment and local development on the basis of eco-regional comparative advantages
3	Rethinking legal frameworks for community forest-business incubation	3.1 Research fairer models of local community control over forests that make business easier	Research, CSOs, MINFOF, MINADER, MINEPAT, MINPMEESA, tech start-up, business incubators, private sector, TFP	A process to revise Cameroon CF models in line with more enlightened 'community territory' approaches in the Congo basin and elsewhere with community forestry one of several viable land-use options
		3.2 Pilot new model around clusters of best practice for forest-business incubation	CF federations, CF cooperatives, networks, private sector, business incubators	A programme to pilot a new model of community forestry designed to enhance sustainable forest-business incubation

The CoNGOs project (supported by the government of Cameroon and implemented by a range of international, national and community-based organisations) has represented an excellent entry point for considering the longer-term community forest-business incubation agenda in the country. The project concluded with the historic Yaoundé Declaration (Bolin 2019) – signed by all 17 organisations involved in the project – which stated:

The concept of community forestry in the Congo Basin has come of age. The DRC model of Local Community Forest Concessions, allows for large forest territories based on customary practices to be attributed in perpetuity. It promotes multiple uses for community forests, including cultivation of non-timber products, agriculture, conservation, as well as social and spiritual functions. These features in turn now need to be integrated in the legal frameworks and practices in Cameroon, Gabon, the Republic of Congo and the Central African Republic.

The 1994 Forestry and Wildlife Laws have been undergoing review for some time now. Proposals have been made by different actors operating in the CF sector. Irrespective of the stage of the policy review process, it will be some time before implementation texts are concluded. Therefore, one way to sustain the successes of the CoNGOs project for the benefit of community forest-business incubation would be to lobby for a much more progressive treatment of community territories – within which both forest and agricultural businesses could flourish. By removing some of the impediments to CF business in Cameroon (most of which lie in the painfully bureaucratic processes) it might be possible to fast-track forest-business incubation.

As evidenced by the Yaoundé Declaration, there is widespread support from multiple different stakeholder groups to rethink CF policies, and to design more progressive forest-business incubation approaches that deliver community development (the original objective of CF). Support was evident across many actors, including from the state, donors, the private sector and – most importantly – forest communities and their emerging CF cooperatives and federations.

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In Cameroon, community forestry (CF) has been enshrined in law for the last 20 years. Yet CF is failing to achieve its goals of sustainable forest management and community development, as communities struggle to comply with complex bureaucracy and associated high costs. Forest-business incubation could revitalise CF, by supporting and accelerating the successful development of sustainable businesses in forest landscapes. This report explores options for sustainable forest-business incubation in Cameroon.

Project Report

Theme

Keywords:
Forests, community forests, Cameroon, natural resource management, forest-business incubation

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