

IF Innovation Forum

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Management briefing

How business can tackle deforestation

- Collaborate effectively with NGOs
- Understand policy and enforcement trends



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Contents

Welcome to the first Innovation Forum special report.

Over the coming months, Innovation Forum will be publishing a regular series of management reports like this one on the most pressing challenges affecting business today. Each of these reports will complement our focused conferences where the leading business experts will convene and debate the problems and share the practical solutions that are proven to work.

For business and deforestation issues, the debate will continue **online**, where we will publish more analysis from further stakeholder voices, and at the **Innovation Forum conference on 28-29 October**.

Our thanks to Robertsbridge for sponsoring this report.

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- 3 Foreword**
Brendan May, chairman, Robertsbridge
- 4 Find the thoughtful solutions**
Ian Welsh, editor
- 6 Identify the risks and meet the challenges**
Mike Barry, Marks and Spencer
- 9 Corporate questions answered**
Brendan May, Robertsbridge
- 10 How regulation can help**
Stephen Adams, Global Counsel
- 12 Transparency: the clear solution**
Simo Honkanen, Neste Oil
- 14 Brand engagement – the activist perspective**
Andy Tait, Greenpeace
- 15 Why real progress takes everyone's efforts**
Scott Poynton, The Forest Trust
- 17 Focus on solutions not risks**
Nicole Rycroft, Canopy
- 18 Make it practical and tailored**
Tony Juniper, Robertsbridge



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About Innovation Forum

Innovation Forum was founded in 2014 by Toby Webb. Making up the team are Oliver Bamford, Charlenne Ordonez and Ian Welsh.



Foreword

We need a lively and urgent debate

Business is slowly accepting the need for radical change in behaviour towards the planet's forests, says **Brendan May**

Robertsbridge is delighted to support this report on what business can do to tackle deforestation.

In the course of our work advising companies on sustainability strategy, risk and stakeholder relations, this topic has progressively crept ever larger into view. The urgent imperative to save the world's forests, the carbon they store and the people and biodiversity they sustain has, depressingly, been overlooked for decades. But in recent years it has at last begun to occupy its rightful place on boardroom agendas, not least in response to highly effective campaigns by civil society.

Governments, too, have begun to catch up, although much work remains to be done. Investors, seldom able or willing to take a long term view, are beginning to realise that a supply chain filled with the spoils of forest destruction is perhaps not quite the free pass to profit that it used to be.

Companies have found out the hard way what can happen if you

ignore these issues. And NGOs are being asked to play their part in finding radical solutions to the problem, not simply screaming from the stands in anger.

There are often more questions than answers. Should "no deforestation" become the norm, and indeed can it? What is the best role for established certification systems? And how do we improve governance, restore the forests that have been lost, and compensate those who may lose out as the rush to clear cut subsidies? How can we protect areas not yet ravaged by deforestation, whilst ensuring poverty alleviation and development needs are met?

These thorny challenges have all led to a lively and at times acrimonious debate between the various protagonists across the corporate and non-profit sectors.

What we can all agree is that deforestation casts its long shadow everywhere, often invisible to all but the keenest eyes. It is not just in obvious products including palm

Deforestation casts its long shadow everywhere

oil, paper and major commodities such as soy. Virtually every product, household or industrial, contains some form of cellulose-based ingredient that may well have been grown on land that once contained old growth forest.

As supply chains become subject to ever deeper scrutiny, we will learn more about just how our purchasing decisions as consumers or companies are affecting things, for better or worse.

This report cannot possibly do justice to all the issues, arguments and organisations that populate the deforestation agenda. But it brings together some of the leading case studies and the individuals and organisations who occupy it.

The Innovation Forum conference that will convene them and many others in London on October 28-29 will provide an opportunity for far deeper dialogue and debate. My colleagues and I very much hope to see you there, and that you enjoy this snapshot of the issues at stake, and what solutions might be deployed to tackle them. ★



Brendan May



Introduction

Some answers to the deforestation questions

While business needs help to tackle deforestation risks, when there is cooperation and a multistakeholder approach, thoughtful solutions can be found, says [Ian Welsh](#)

Deforestation is a catastrophe. We all know this – and the numbers are compelling.

A Chatham House report in late 2013 put the net loss of forest area from natural causes or conversion to other uses at an average rate of 5.2m hectares a year from 2001-10. Agricultural expansion is, the report says, the most significant driver of deforestation, accounting for up to 80% in some regions. Pasture and feed-crops for cattle, and the mega commodity crops such as soy, maize, palm oil, rice and sugar cane are those most closely associated with deforestation.

Logging, and specifically illegal logging, remains a major concern – though it has been the target of intense activist campaigning and, more recently, a raft of regulation in timber producing and consuming countries. While more than 100m cubic metres of illegal timber are harvested annually, the total amounts are falling, according to Chatham House. That said, the problem remains significant.

In recent years a principal focus for anti-deforestation campaigners has been

southeast Asia, and particularly Indonesia and Malaysia. The latter now has the world's highest deforestation rates, having lost 14.4% of its forests between 2000 and 2012, Mongabay.com reports.

Business the target

Activist organisations and other NGOs have long targeted big business and used campaigns against brands to help drive change. The dangers from deforestation are clear and something with which consumers can engage. As Richard Donovan from Rainforest Alliance argues, speaking to Innovation Forum: “Species loss can attract attention and is something people can engage with.”

Greenpeace senior campaign adviser Andy Tait says that campaigning based on “charismatic mega-fauna” has helped to raise the awareness about brand risk.

And companies are changing the way they behave. Commitments around curbing deforestation have become commonplace. But at the same time the route to achieving change is not always clear cut.

For companies keen to force change

Agricultural expansion is the most significant driver of deforestation

there are many potential challenges along the way – and these aren't necessarily complicated. Marks and Spencer's director of Plan A Mike Barry points out that while deforestation may seem a simple word, “there is a lack of widespread agreement on its technical definition”. Barry wants a “common language for deforestation, whether it's dealing with palm oil or soy or whether it's in northern Europe or southeast Asia”.

Global Counsel's Stephen Adams believes that the market for timber products is responding to consumer concerns. He points to “improvements in public policy strategy” as helping to push the debate forward, most notably amendments to the US Lacey Act and the European Union's timber regulations. Adams argues that there is now “a really interesting challenge for the US and EU to work more closely on their policing of illegal logging and enforcement”. Given that the aims of the two sets of rules are similar, it would make sense for there to be mutual recognition of standards. This type of cooperation is not, Adams points out, something that the EU and US have typically excelled at.

Regulation can help

It's an often-quoted myth that business, as a rule, doesn't like regulation. On the contrary, when it comes dealing with deforestation Mike Barry argues that “good regulation ... creates market certainty and a level playing field for everyone”. In fact, Barry says, the lack of proper governance for tropical forests and scarce land tenure information have become “critical challenges”.

Supply chain certainty and continuity are central to corporate sustainability – and companies buying commodities now want transparency so they know where their purchases come from.

Unilever works with the World Resources Institute to monitor forest changes in areas where its suppliers operate. Speaking to Innovation Forum, Dhaval Buch, Unilever's chief procurement officer says: “We will source from suppliers who will deliver from known and certified sources ... Our first step is

Lots of jargon – what does it mean?

There many abbreviations for relevant organisations, certification bodies and government regulations relevant to the deforestation debate. Here are some you'll find in this report. Opinions about the relevance and rigour of these vary – the descriptions here aren't a critique. And this list is only a selection.

FSC – Forest Stewardship Council – Following the 1992 Rio Earth Summit, a number of NGOs agreed on the need for an independent international organisation that could credibly identify well-managed forests as the sources of responsibly produced wood products and develop a certification system for such forests. FSC is what emerged and its certification is regarded by many as a gold standard.

RSPO – Roundtable on Sustainable Palm Oil – Set up in 2004 with the aim of promoting a more sustainable palm oil sector through multistakeholder engagement and establishment of global standards. RSPO-RED is an EU-approved certification scheme in line with the EU's renewable energy directive.

RTRS – Round Table for Responsible Soy – Since 2006, RTRS has worked to promote soy production that reduces social and environmental impacts and improves the economic status of the producer. It is developing certification standards for soy production and supply chains.

GRSB – Global Roundtable for Sustainable Beef – With a similar mission and agenda to the other roundtable initiatives, GRSB aim is to advance continuous improvement in sustainability of the global beef value chain through leadership, science and multi-stakeholder engagement and collaboration.

FLEGT – The Forest Law Enforcement, Governance and Trade Action Plan was established by the EU in 2003 with the aim of reducing illegal logging through strengthening forest governance and promoting trade in legally produced timber.

EUTR – EU Timber Regulation – Coming into force in 2013, EUTR outlaws the sale or supply of illegally harvested timber and timber products within the EU. The regulations are applicable to any organisation that trades in any of a wide variety of wood-based materials including pulp and paper.

Lacey Act – This is a federal conservation law in the US, originally enacted in 1900, that bans trade in wildlife, fish and plants that have been illegally taken, possessed, transported or sold. It has been amended several times including in 2008 when it was extended to cover further plants and plant products, including illegal timber.

to get traceability back to all the palm oil mills we source from.”

Neste Oil's senior vice-president for sustainability Simo Honkanen agrees on the need for transparency: “Any supply chain where the end producer does not know the origin of its feedstock, or is not determined to improve knowledge about

its supply chain, is at risk.”

Assessing the risks in any supply chain is challenging, and many companies turn to external partners – frequently environmental NGOs – for help. Neste Oil has worked with The Forest Trust on defining its deforestation risks, and how to approach them, as have many other



Logging in the spotlight

companies and brands with operations impacting forests. TFT's executive director Scott Poynton wants to engage with business and drive change, but then reward those companies that do make the right improvements. He argues there is a need “to protect” and “to heal”. Halting deforestation is the protect side of things, but healing is important, he argues, “because we need to heal damaged lands, damaged lives, our damaged relationship with nature”.

APP's pledge

Poynton highlights Asia Pulp and Paper's recent pledge to protect and conserve one million hectares of forest in southeast Asia as an example of what's possible. APP is, of course, one of the most striking examples of a company transformed from being a major target of environmental campaigning to gaining rightful praise, due to profound shifts in policy and a genuine desire to halt forest destruction.

This demonstrates that while deforestation is real and significant problem, there are answers. Environmentalist and writer Tony Juniper points out that the solutions don't have to be radical but rather “they just need to be practical and based on the realisation that the world has every good reason to save the forests so as to gain a range of economic and social benefits”.

Maybe this is the answer. The solutions can be found, but they must be a good fit, for forests and for business. The search for these and how best to implement them remains the big challenge. ★

The solutions can be found, but they must be a good fit



Business and deforestation

How to assess and address supply chain risks

Marks & Spencer's **Mike Barry** says business can identify the deforestation risks in supply chains, and outlines some possible solutions to the resultant challenges

What are the global, regional and local impacts of deforestation that have most impressed on you the seriousness of the problem?

Collectively we've not been addressing the rapid rate of deforestation across tropical forests, and this has resulted in a number of serious social, environmental and economic consequences.

For example, the displacement of indigenous peoples and conversion of traditional lands without free, prior and informed consent or compensation has led in some cases to social exploitation such as slavery and other human rights abuses.

Environmentally, the widespread destruction of unique habitats has led to some species becoming critically endangered – such as orang-utan and Sumatran tiger. Forest degradation undermines the integrity of forest landscapes, leading to the loss of high conservation values and biodiversity. There are significant greenhouse gas emissions from the loss of high carbon stock forests but also from draining or destruction of peatland.

Illegal logging also means a loss of economic value, locally and nationally, through lost taxes and logging concession fees.

Marks & Spencer has acknowledged how its products and operations are and can be linked to forests and deforestation risks. In general terms, what sort of supply chains are most at risk from deforestation impacts?

Although logging is the most direct cause of deforestation, conversion of forests to agri-commodity production is also highly significant.

Plantation timber, palm oil, soy and cattle production are currently the biggest drivers of tropical deforestation, and any company using these materials has to seek assurance that they are not contributing to deforestation.

How can a globalised business check for deforestation risks in its supply chain?

Deforestation is a simple word but there is a lack of widespread agreement on its

technical definitions. We need a common language for deforestation, whether it's dealing with palm oil or soy, whether it's in northern Europe or in southeast Asia.

Just identifying which land is suitable for conversion and which land should be protected is complex, for example. Historically, high conservation value (HCV) assessments were used to determine which land should be protected. But the thinking has now expanded to recognise the need to include above and below ground carbon. There is currently a lack of widely accepted definitions and thresholds.

In terms of corporate supply chains, unless a company has traceability back to a growing region that is not associated with deforestation, it should assume these commodities pose a deforestation risk that needs to be managed and mitigated.

Certification is the easiest way to mitigate deforestation risk, and schemes such as Forest Stewardship Council, the Roundtable on Sustainable Palm Oil, the Round Table for Responsible Soy and the Global Roundtable on Sustainable Beef all give some assurance of avoidance of deforestation, however not all are sufficiently demanding to meet market needs. We know that these schemes need to evolve and improve and it is important that the market and NGOs support their development. Alternative approaches are also useful but should be based on the principles of multistakeholder consultation and transparency to achieve the balanced and rigorous outcomes we need.

If a company buys substantial volumes of deforestation-risk commodities, they should work with suppliers to implement progressive policies on traceability and land use change and verify compliance.

How does deforestation affect how Marks & Spencer establishes its supply chains?

Our knowledge about deforestation risk means we are very considered in the way we source deforestation risk commodities such as soy, palm oil or timber. We require high levels of assurance that our suppliers are managing these risks

We need a common language for deforestation



Mike Barry

either via certification or other assurance systems (for example the Soy Amazon Moratorium).

How do you assess the risk to your supply chains from deforestation?

We engage with producers, academics and civil society to understand the drivers of deforestation and the effectiveness of the solutions available to us and our suppliers.

We ask all our suppliers to report on their use of deforestation risk commodities: soy, palm oil, Brazilian beef and timber, and tell us how much they use, where it comes from, and whether it is certified or not. We risk assess the full value chain, not just plantations, forests and farms, in recognition that disreputable organisations will “launder” illegal production through the supply chain.

How do you address these risks?

We have made public commitments to not buy soy, palm oil or beef associated with deforestation, and to only buy sustainably sourced timber.

We use an expert third party company to carry out risk assessments based on the commitments and risk assessment criteria above, and report back to buyers, suppliers and the Plan A team on what progress is being made on Marks & Spencer’s commitments.

M&S works with industry partners such as the Retail Palm Oil and Soy Groups, and the Consumer Goods Forum, to introduce systems for market transformation and to advocate for change.

We sit on the board of the RSPO and engage directly and indirectly with the boards of the RTRS and FSC to ensure the development of market friendly systems and articulation of market demand within these forums.

M&S has invested in capacity building programmes with producers in vulnerable regions. Improving productivity and increasing farm yield is a great way to reduce pressure on forests and we would like to see more such programmes being supported.

We have also established partnerships



with WWF in the Heart of Borneo project (now concluded) and with Cool Earth in the Peruvian Amazon to protect the world’s most vulnerable forests.

To what extent do you think that deforestation is a “hidden” risk for companies?

When you are selling a very obvious wood product, people accept the need for change. When wood is more distant – in paper products or packaging, for example – you can persuade people to see the challenges. But when you get to food commodities – cocoa, palm oil, coffee, soy – then it’s even further away from their consciousness.

There is therefore a real challenge explaining forest footprints – and simply to get companies to acknowledge that there are forests in their supply chains.

It’s important companies fully acknowledge and take responsibility for the full breath of impact. Determining the scope of this is important – for example, a credible scope has to consider soy used indirectly in feed as well as food, and prioritise palm kernel oil supply chains as much as palm oil.

So, in other words, it is a risk that many don’t appreciate?

Yes. For the past ten years it has been the leading companies that have been dealing with the deforestation challenges. But now there is a shift towards engaging

Beef supply impacts forests

the vast majority of businesses. Having detailed discussions about deforestation definitions and solutions is challenging – but we all want to know what to do to solve the problems.

Few companies of any scale who operate in demanding markets (such as northern Europe, US and Australia/New Zealand) are not engaged and active. However the same cannot be said at the moment for smaller companies or those operating in less demanding markets.

Certification must be robust and scalable

What do you think are the pros and cons of certification

A certification scheme must be credible. If I am going to go to a great deal of effort to convince my colleagues about a scheme’s benefits then I don’t want it called into question by anyone. It needs to solve the problem.

Then, I look at ease of applicability and costs – can it be implemented swiftly and audited robustly. A scheme must be scalable and not niche.

One of the under-rated benefits of certification is its ability to get people with conflicting perspectives, priorities and agendas round the table and engaged in problem solving. Because of this, decision-making can be slow and cumbersome, but outputs have solid support and buy-in.

If certification standards and systems are transparent and independently verified, trust will generally be high. On

the other hand, when quality of implementation is variable, this can undermine the credibility of some certification claims.

Certification continues to be a strong option for organisations with complex supply chains as it provides a route to end-to-end management of production and supply chain assurance.

The biggest challenge currently for certification schemes is for them to become more dynamic and respond faster to change – in the market, science, or politics – whilst also demonstrating positive impacts.

...and a “no deforestation” approach?

By its nature “no deforestation” can be a narrow approach as it does not necessarily seek to address the full range of deforestation impacts, social as well as environmental. It can limit the opportunity for well-managed trade-offs in land use to make sure the highest value landscapes continue to be protected. A no deforestation approach generally involves partnerships with organisations who have expertise in forestry and commodity land use change, and capacity on the ground

to support delivery.

The strength of such partnerships is their ability to move at pace and to actively support business to meet no-deforestation objectives.

How has a lack of proper governance, and clarity over land ownership, exacerbated deforestation?

The lack of national, regional or local governance and an absence of reliable land tenure information are critical challenges. As a business we welcome good regulation that creates market certainty and a level playing field for everyone.

A holistic approach is important. Single commodity-based schemes cannot address landscape level problems on their own. Displacement of the problem from one commodity to another – eg soy conversion displaced by cattle – is a major challenge that is best addressed by political intervention.

National institutions need to take responsibility for protection of high conservation value forests so that when such areas are identified, conversion is

prohibited, and such a ruling effectively enforced.

Dispute resolution can be notoriously challenging in the absence of land tenure data and recourse to legal process. Certification schemes should not be expected to fill institutional governance gaps.

Finally, what have been the impacts, good and bad, of international regulation such as the EU Timber Regulation?

EUTR has been well thought through. It has compelled business for the first time to actively manage timber supply chains, not just timber traders but all businesses that buy or sell wood based products. While this is unlikely to have a short-term transformative effect, over time it will help gradually establish proof of legal sourcing as a market access issue.

An impact of the EUTR will be more widespread coverage of traceability systems or certification standards throughout the value chain, which should over time help eliminate illegally traded and harvested timber and timber products.

There are always adverse impacts of any regulation. For EUTR, a notable one is a move away from wood towards other materials (often plastic) to avoid management obligations. Such rules also can lead to an avoidance of sourcing from poorly governed regions where confidence in documentation and assurance systems is weak. This is particularly regrettable as these regions are often those who are most in need of the economic benefits of well managed forestry.

There are some limitations in the regulation as it currently stands, such as confusing definitions of what is in and out of scope, and we look forward to these being addressed as it evolves. The EU also has to make sure it is enforced consistently and robustly across all countries which is not currently the case. I feel that the slow adoption of the EU’s FLEGT (forest law enforcement, governance and trade) licensing has been particularly problematic. It is not yet clear if FLEGT can achieve the change it has set out to deliver. ★

We welcome good regulation that creates market certainty

◀ Getting certification to scale is the challenge



Business and deforestation

How to get to grips with deforestation risks

Supply chain risks from deforestation are daunting and finding the right solutions is a major challenge. **Brendan May** answers some of the questions companies need to ask

Are there really many supply chains at risk from deforestation impacts?

Yes, a frighteningly large number of sectors need to be very careful. All supply chains with exposure to agricultural commodities are at risk – palm oil, cocoa, and coffee for example. Beef (ranching), and products derived from cattle such as leather, are among the biggest drivers of deforestation. So too is the global pulp and paper industry. Soy driven deforestation is largely under control in Brazil, but this may change with the expiry of the soy moratorium in January 2015. The extractives industry is also responsible for significant forest loss.

OK, but how can I check if this affects my supply chain?

The first step to finding out what deforestation risks exist in any supply chain is to understand the supply chain better. Many companies simply haven't a clue where their products come from – particularly large companies with thousands of complex supply chains. So start by mapping out your supply chain. Then look at the associated risks and opportunities, and develop a strategy to minimise and/or maximise them. Develop and implement a no-deforestation policy if relevant.

If you need help, ask a relevant NGO – such as The Forest Trust or Greenpeace. The World Resources Institute also has improving satellite monitoring software in the form of Global Forest Watch and is able to identify areas potentially at risk from deforestation. The Rainforest Alliance has years of experience in mapping supply chains and verifying forestry management practices.

Pick your partners carefully though – they all adopt differing approaches and there is plenty of debate about the best ones.

So I've started to identify the risks from deforestation. I need to get my suppliers to go down the certifica-

tion route, right? What are my other options?

Certification was the obvious way to go when the whole movement started several decades ago. Sadly, though, certification has not stopped global deforestation, partly because markets for certified forest products have not achieved significant scale.

The value of certification as a tool is not in eco-labels, which few consumers understand or recognise. It's in putting in place management systems for better practices, and tracking progress through independent auditing. But experience shows there are no fail-safe solutions – certification included.

The perceived failure of certification systems has led to the emergence of “no deforestation” systems and approaches. My personal view is that we have to move to a clear no deforestation system among all major buying business – largely brand owners.

The regulatory landscape seems to be shifting towards tighter rules, building on voluntary agreements already in place. How will this help?

With all public policy there are unintended consequences, and often compromises in order to reach some sort of a deal. Nevertheless, it is better that rules exist than not. Certainly the EUTR has made quite a few forest based businesses in the tropics sit up, take note, and work out if they are compliant. Often, government regulation has played catch up to existing public-private initiatives between civil society and big business.

If I'm looking for good examples to follow, which are the companies that impress you in their approach to robustly dealing with their deforestation risks?

Nestlé stands out – interestingly it has



☉ Coffee and other commodity crops drive deforestation

gone from laggard in the supply chain sustainability stakes, to leader, and in particular on deforestation. On the supply side I am impressed with the way Asia Pulp and Paper have grasped a particularly thorny issue. Its shift to completely banning natural forest clearance, sticking to it, sorting out reliance on plantations and then committing to protect and conserve 1m hectares of rainforest, is impressive. I have an interest in that my company advises them – but we have been more than clear that we don't advise businesses we believe are half hearted!

Pick your partners carefully

What is encouraging is that deforestation is now a boardroom issue. Companies such as Unilever and M&S are leading the charge in arenas such as the Consumer Goods Forum. Companies that fail to play their full part look extremely vulnerable – both in terms of business risk and reputational damage.

Which deserve the “most improved” plaudits?

Golden Agri Resources and Wilmar in the palm oil sector, and Asia Pulp & Paper: these are companies operating in extremely difficult areas with poor governance and vast development needs. They have all committed to the previously unthinkable – a delinking of their products from deforestation. These companies deserve a lot of credit for their ambition and their progress in the past couple of years – something other companies could do well to emulate. ★



Brendan May



Business and deforestation

Radical regulation for better forest protection

US and EU rules on timber sustainability have been tightened, and big companies want more certainty in their supply chains. Public policy expert **Stephen Adams outlines what the regulations require and how they can help combat deforestation on a large scale**

Why do you think the sustainable timber debate is something more companies are taking seriously?

The market for timber-derived products has become increasingly concerned about how to guarantee sustainability down long complicated global supply chains. Two factors have pushed the debate forward.

Firstly there have been improvements in public policy strategy, principally amendments to the Lacey Act in the US and EU Timber Regulation in Europe to change the due diligence requirements for timber importers.

Secondly, the market has taken matters into its own hands somewhat, through a policy of exclusion of companies that are not making the right commitments, as a way of informally policing the same aims.

These moves are driven by customer sensitivity to sustainability. Supply chains are now global, and there is a great distance between the origin of commodities such as timber and the procurer. Yet

customers expect certainty about what they are buying – and companies are looking for ways to provide that certainty.

What have been the specific developments for EU regulation changes? What's going to be next?

An important development for the EU's forest law enforcement, governance and trade (FLEGT) process is to make a success of the EU-Indonesia voluntary partnership agreement, which is the first of its kind and the next big step for FLEGT. This states that when the Indonesian domestic regulations have reached a sufficient standard, timber from Indonesia will be treated by the EU as automatically meeting EU Timber Regulation standards. This will sharply reduce the scale of due diligence obligations for EU-based importers from Indonesia.

The VPA is signed but not yet in operation. It looks possible that it may come into force during 2015. The challenge now is to make the Indonesian

forest management certification system (known as SVLK) a success, meaning that it operates well and is properly enforced. Only then can the VPA properly come into operation.

Getting SVLK up to scratch is a complicated process, not least because Indonesia's timber sector is large and highly complex. There are significant capacity issues in terms of auditing, for example. The answer is not to relax efforts, but to help Indonesian companies achieve the capacity required.

The EU-Indonesia VPA shows that it is possible for bilateral cooperation on regulatory standards to drive the common goal of better enforcement of environmental protection.

How is the Lacey Act different?

While the Lacey Act has similar intentions to the EU Timber Regulation, being targeted at the import and sale of timber into the US market, it differs in a couple of basic ways. The Lacey Act criminalises the import or sale of illegal timber on the US market, while the EU's timber regulations criminalise not the import of timber itself, but the failure to carry out at the point of placing timber on the market for the first time due diligence on what you are importing.

There is a really interesting challenge for the US and EU in how they can work more closely on their policing of illegal logging and enforcement. FLEGT and the Lacey Act are very close in terms of their intent, so it would make sense for there to be some common standards, or for the US and the EU to mutually recognise each others' standards. This is, of course, not something that the EU and US have typically been good at!

While regulation has a clear role to play, what are the pros and cons of voluntary timber certification schemes?

If the challenge is how to create certainty in the supply chain then there are certain tools that can help achieve this. The law, and the obligations it imposes, is one.

Certification is another, but although with certification systems that are market based is that – just like mandatory

It would make sense for there to be common standards



Stephen Adams



Supply chain certainty is the real challenge

practice, then self-excluding yourself doesn't make sense. FSC is successful in certain markets, but not yet globally. The problem is that what might work in northern European pine plantations is not necessarily applicable in other markets.

Many big companies are moving the debate to “no deforestation” – is this the right move?

There's certainly a lot of interest now around the idea of making the next step in sustainability commitments no deforestation. And if we can solve the definition problems – around what “no deforestation” actually means – this is in many ways the next step from anti-illegal logging. Strict definitions are required, which take account of questions such as how to protect high-conservation value forests.

It could be the next frontier, getting the big procurers to see if they can really put together a no deforestation supply chain that can be verified in a credible way.

Finding the right NGO partners to help tackle deforestation can be very difficult for global companies with complicated supply chains. What should companies look for?

The NGOs that make the best partners are the ones committed to constructive change. While we need critics, we also need those that are prepared to move from criticism to planning for improvements. What defines a serious civil society partner is someone that is willing to be at the table and helping to implement change.

The EU-Indonesia voluntary partnership agreement has sought input from the toughest critics and actually includes civil society in its regular enforcement checks. There has been an issue of cultural change for all sides. For the government and companies, being in the room with your toughest critics is an uncomfortable place to be. Many companies had developed an inherent suspicion of NGOs. But now they are seeing the benefits of cooperation that is driving change. ★

Strict 'no deforestation' definitions are required

systems – everything depends on credibility of their design. It is critical that the science behind both kinds of systems is robust and regularly refreshed as companies end up relying on the science in the claims they make.

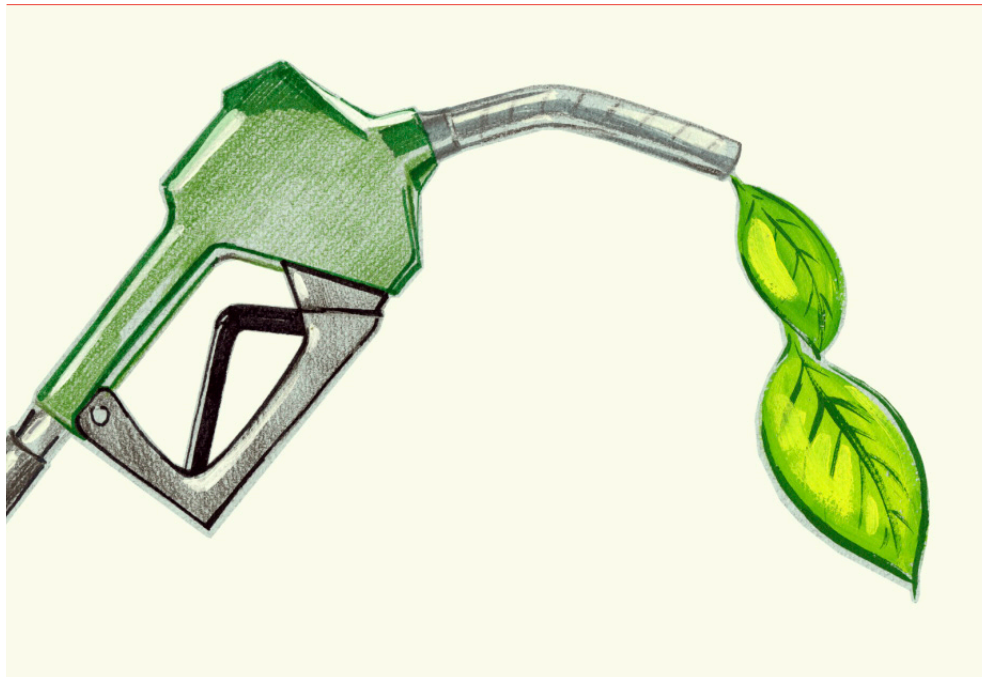
When considering a timber certification system, companies should ask firstly if the system is sound. Then they need to judge if their customers will find the certification system reassuring.

Thirdly, companies should consider if the certification system allows the sourcing they need.

The Forest Stewardship Council

is the most recognised certification scheme. But, at the moment, because of its certification rules, FSC is able to cover only parts of the global forestry market. For Indonesian timber suppliers it is hard to achieve this certification as FSC has its strict rules about how old a plantation has to be before it can be certified. This can be a problem for some fast-growing timber crops.

So, a question for FSC is whether they want to be a system that can't be applied to vast swathes of the market in the developing world. If the aim is increasing awareness of sustainable



Business and deforestation

Complex biofuel supply chains and the deforestation risks

Neste Oil's **Simo Honkanen** explains why supplier transparency and knowledge where your resources come from are essential for tackling deforestation

As a fuels company, what are the supply chain risks from deforestation that most impact your business?

Any supply chain where the end producer does not know the origin of its feedstock, or is not determined to improve knowledge about its supply chain, is at risk.

The renewable fuels industry is strictly regulated, particularly for example in the EU, and fuel producers are accountable to trace back their feedstock. The companies in this sector are now making significant efforts to manage their supply chains from a traceability and regulatory point of view.

There is a common, global task for all supply chains that are using large areas of agricultural or industrial land to take forests and ecosystems better into account in their business.

Collectively, we simply have to become better at this. In today's world where information is seamlessly moving from one continent to another, and everybody has access to the data, it is also in the interests of producers to develop

transparent and responsible operations. These, in turn, contribute to a more positive general perception of businesses with forests in their supply chains.

I personally believe that there has to be a commitment to improve continuously knowledge across the whole value chain and expand the scope to see the wider impacts of companies' operations.

What are the checks you use for assessing deforestation risks your supply chain?

Companies should think about the origin of their feedstock and learn how their potential suppliers are thinking about sustainability.

At Neste Oil, we are firm believers in stakeholder engagement and try to have a dialogue with as many relevant stakeholder groups as possible – in order to learn but also to try and ensure we have as positive an impact as possible.

It can be a good idea to have external partners to work with risk assessment. We have been in cooperation with The

Forest Trust (TFT) now for a year and half. In 2013, they started by doing an external risk assessment of our suppliers, and now they are moving forward with engagement sessions focusing particularly on deforestation. It is a good experience so far for all parties involved, including our suppliers.

How do you assess the risk to your supply chains from deforestation?

We always want to know how and where our feedstock is produced before we sign a supply contract. Biofuels are very strictly regulated in our main markets and knowing the whole supply chain is a legal requirement.

Before a contract is signed we also carry out our sustainability due diligence procedures for the supplier, where we go through supplier's sustainability practices and how sustainability related matters are being managed. By following this procedure for a number of years we have gained quite a good picture of the awareness of sustainability-related matters among producers.

Our experience is that that vegetable oil industry has made significant progress in sustainability awareness and practices in the last six to seven years.

We require that, for instance, all our palm oil suppliers are engaged in recognised certification systems, such as RSPO-membership, and ISCC or RSPO-RED certification.

It is very important that our vegetable oil, or any other feedstock, does not come from "no-go" areas that are forbidden by European legislation. Therefore all agricultural land history has to be transparent, and if the land has recently become used as agricultural land, it has to be proven that no valuable land or forest has been converted to oil crop use.

What does this look like in practice – and what sort of partnerships do you need to develop?

Our sustainability and supply teams have a very close working relationship with our suppliers. We also talk to many other stakeholder groups, including regulators and NGOs in our various markets, and

Companies should think about the origin of their feedstocks



Simo Honkanen



assist our suppliers to understand legal regulations in detail. Issues concerning (for example) greenhouse gas emissions are important in this sense.

Our latest initiative is our cooperation with TFT. They did a risk assessment of our suppliers and now we are moving forward with an engagement programme, led by TFT, and based on our commitment to zero deforestation.

We have seen a number of companies, both producers and buyers, moving in the same direction with deforestation commitments. This is a very positive development.

While some are making some definite steps forwards, is deforestation still a risk that many companies don't appreciate?

Supply chains are getting longer and more complicated. There is now a clear public expectation that companies should take wide responsibility over

their whole value chain.


Where a company does not know its supply chain thoroughly, deforestation can possibly become a "hidden" risk.

On the other hand at Neste Oil we have seen a tremendous development among the commodity companies over the years we have been active in biofuels. Improving supply chain transparency and engagement is a topical question among all stakeholders at the moment. Good evidence for this is the rise of voluntary certification systems and stakeholder engagement pushing towards "no deforestation" pledges.

What do you think are the pros and cons of a certification and/or a no deforestation approach to the problem?

Both certification and no deforestation approaches are needed.

Certification forms a common, measurable basis for performance. It

 Certified palm oil only for Neste Oil

is a system that can be audited and offers a systematic way to see a company's performance. In many cases certification schemes are multistakeholder initiatives, which require dialogue and interaction between many stakeholder groups. Therefore, developing a certification system may sometimes be a bit time consuming.

A no deforestation approach is an important commitment from a company to operate business in a certain manner. It is looking to the future and is in some cases a commitment or statement of change. We at Neste Oil believe in engagement and recognise that the issues surrounding deforestation are sometimes very complicated. Therefore it is important that all relevant stakeholders are included in the dialogue and work for jointly accepted solutions.

Both approaches are important, and they should be seen inclusive rather than exclusive. ★

 The public expects companies to take responsibility over the whole value chain

Business and deforestation

Activists and brands – achieving the engagement balance

Andy Tait explains why some companies are becoming more engaged with NGOs on deforestation's challenges

Is it becoming easier for activists to engage with companies on deforestation issues? To what extent are brands becoming more aware of how their businesses impact on forests?

Approaching a company has become considerably easier as deforestation is more widely recognised as a serious environmental problem, and a corporate brand risk. Companies are seeing that many of their corporate peers are becoming engaged on the issue, and the decision by the Consumer Goods Forum to prioritise work to tackle deforestation sent a clear signal that this is an urgent sustainability issue that needs to be addressed.

The higher profile that international climate change negotiations have achieved, and the fact that deforestation is seen as a key part of the debate, is also very helpful. It is easier for NGOs to make the point to companies that they need to address deforestation too.

Campaigns that have focused on so-called charismatic mega-fauna – species like orangutans or tigers – have also helped raise the awareness about brand risk.

How do you achieve the right balance between campaigning against companies and working with them to improve things? How comfortable do you feel when sitting down with a company that's previously been part of a campaign?

We like to say that we have no permanent enemies or friends, it depends on the actions that companies take. Large companies that have been engaged in deforestation or other unsustainable practices aren't going to go away, so at some point you have to engage with them if change is going to happen.

If there is sufficient evidence that they are engaging with the issues at a senior level and if there is evidence of credible commitments on the table then it's at that point that the balance can change for us,

moving away from campaigning against companies into more positive engagement with them.

Increasingly important as part of the deforestation piece is about what to do about previous practice – and whether companies are prepared to make conservation commitments that help address this. It's particularly relevant where there are certification schemes with cut off dates – such as FSC or more recently RSPO. Should there be a pathway back for companies that continued with deforestation after these cut offs?

Asia Pulp and Paper is a good example of a company making progress, with a recent strong commitment to support conservation projects in Indonesia over an area of up to 1m hectares, which matches the area they have under plantation. APRIL, part of the RGE group and the second largest pulp company in Indonesia, has made similar statements though has done so whilst still continuing to rely on rainforest destruction – this is obviously not credible from our perspective.

When you bring companies to the table you need to identify the most at-risk and valuable forests – a big task. How do you identify the most important areas of forest that should be the priority for protection?

The first thing is about halting clearance whilst discussions take place and decisions get made about what areas to protect. "Talking and logging" is a no go from our perspective.

Getting independent conservation assessments implemented is a key part of the solution, including assessments that identify areas that can still be viable forest. For that, satellite imagery has become very important. It can sometimes be difficult to differentiate between plantation and natural forest and that's when you need teams that can go and analyse the



Informed consent is a forest development essential

situation on the ground. It is also critical that any development is on the basis of local communities having given their free prior and informed consent.

Following such assessments, companies need to develop integrated forest management plans for the areas set aside for conservation. This process should look for large scale conservation gains. Protecting small isolated forest fragments inside a sea of industrial scale plantations isn't much of a win for forest conservation.

We have no permanent enemies or friends, it depends on the actions that companies take

How has the role of regulation been changing the deforestation debate?

A country can have great regulations for forest protection on paper, but if a lack of governance means that these laws are ignored and that the relevant paperwork can be bought, then we are no further ahead.

Also, legality and sustainability are not the same thing – there is a lot of legal deforestation taking places in countries around the world. We can identify legal risks in the supply chain – and companies obviously do stand up and take notice of these. But addressing these legal risks doesn't solve the deforestation issue.

We're a long way from a situation where there are demand-side regulations that require timber or agricultural products to be legal and sustainably produced. In the absence of such measures we and others continue to press hard for voluntary approaches based around the actions of companies that at least start to address these issues. ★



Andy Tait



Business and deforestation

Business can't save forests alone

Scott Poynton argues that while business has an essential role to play in combating deforestation, it isn't going to solve the problems alone

“Business saves the forests” is too simplistic a prediction or a wish. It's going to be more complex than that, and it's not down to any one business to save forests in the same way that we shouldn't celebrate any one NGO or expert or whoever for being the only player involved in saving forests.

It's a change ecosystem at work and we need to better understand the role that all the many players play in order to go to scale. In that sense, I get frustrated with environmental journalists because they seldom help people understand the true, deep nature of the change process.

They do quick, simple, even lazy analyses of change processes with their headlines: “Company X caves into NGO campaign”. It's never, ever that simple. Change is far more complex and happens deep in the private and mysterious recesses of the human heart and has many things that influence when it might or might not be embraced.

Yet, such reporting reinforces the “righteous victor beats evil company” thinking that might be great for NGO fundraising but doesn't help save

forests because it hinders getting more businesses make the necessary change, causing them to recoil from the tough introspection that's part of the process.

Transformation required

Getting businesses to change requires doing more than just beating them up, more than just asking them to be certified, more than just asking them to comply with laws. Those tools are important but alone none of them can or indeed have as yet led to the deep transformation we need to save forests, oceans and other ecosystems.

At TFT, we think we need to shine a light on what's good within people and help it to emerge. We need, together with NGOs, lawmakers and others, to help the true culture and soul of a company to emerge. That comes from inspiration, vision and calling for their best.

Reaching that objective actually need not take a long time. We've seen from our work that it can happen very quickly if you approach it the right way!

The next major step we're trying to achieve along with our NGO

and business partners is to provide governments with the confidence that No Deforestation and No Exploitation policies are actually good for people, good for businesses. Governments worry that doing these things will make businesses in their country uncompetitive, which could lead to huge job losses and social unrest.

Better to chop down the forests than to have riots on the streets, right? So governments get nervous about making laws that might risk security. Fair enough.

So we have to create examples to show that bad environmental and social practices lead to NGO campaigns that can cost companies customers and money and make them uncompetitive. We need to show that doing the right thing by protecting forests and looking after people can lead to more orders, greater investment, true joy and happiness.

If we can create enough examples like that, then show that these good examples also help to create a more positive picture of the country in question, this creates even more business opportunities.

Getting businesses to change requires doing more than just beating them up

Demonstrable benefits

If we think of Indonesia, we now have the great examples of both Asia Pulp and Paper and Golden Agri-Resource and we also have Wilmar now leading the way. We're working with smaller companies too, and if they can all collectively start to show that customers are returning and placing increased orders because of their improved social and environmental performance, then the government might be encouraged to say, OK, others need to follow and let's change the laws to oblige them to do so.

This is why we're encouraging customers to come back to APP and to drive their orders to suppliers, like GAR and Wilmar, who have set and are implementing ambitious policies. I don't understand at all why NGOs are still telling customers to wait before placing orders with these companies. Who are they placing orders with in the meantime? Companies who haven't yet made such strong commitments but



Scott Poynton

who just haven't been targeted yet by NGOs! This is holding back our collective journey to the bigger prize.

It might not happen that way but with pressure from customers – which is why those 2020 targets smell so badly, there just isn't any pressure – from NGOs, from experts and with people like us working away on the inside of companies to help them through the really tough change process, we might just get enough momentum behind us to get global changes across the whole industry.

Without this deeper transformation, people can continue to encroach and destroy forests and displace indigenous peoples even within concessions of companies like APP who are making

global leading policy commitments. We can all work hard on the ground to try to implement these policies but if neighbouring companies don't act appropriately, forests will still be destroyed. If illegal loggers can operate with impunity by creating fear amongst communities and government officials, we're still heading for the cliff.

A continuing process

And here's the ultimate prize – we don't want to see businesses just stopping at No Deforestation, No Exploitation. Of course, that's a critical goal and if we get there, we can all celebrate but it shouldn't be the end point.

At TFT our motto is “to protect, to

heal”. Stopping deforestation is the “to protect” part of the story. But we need to bring in the “to heal” part because there has been so much damage to date and we need to go beyond just saving what's left; we need to heal damaged lands, damaged lives, our damaged relationship with nature.

We think we can do that if we celebrate what's good within people. That might sound idealistic but you only have to look at APP's announcement pledging to protect and restore one million hectares of forest to realise what's possible. We're in discussion with other companies about what they can do to become healers too but who would have thought even 12 months ago that APP would have been the first in this space?

Congratulations to them but it really shows what's possible when people sit down and speak to each other about the “art of the possible” as opposed to just assuming they're evil.

Engagement that works

So, it's not about “business saves forests”. We all need to work together, which is why I feel that NGOs getting cranky that TFT works with businesses is truly nonsensical.

This scenario of going for that huge big prize – to get everyone working together to protect, to heal – also explains why I oscillate between hope and despair. Even with great announcements by leading companies and victory claims by NGOs, alone these cannot save the forests or the people because somewhere else there'll be other people who aren't motivated in the same way.

Yet, if we can get some momentum, beyond “one company at a time” thinking, we might just get there.

It's all quite a challenge and the sooner we all pitch in together, stop celebrating weak and pathetic 2020 targets and put our shoulders to the wheel, the more likely we are to be able, at some point and hopefully before it heads over the cliff, to jump from that doomed boat we're all currently sailing, into a different boat heading for more serene waters. I hope we can. ★

Without deeper transformation, people can continue to destroy forests

☞ Save what's left; restore what's been destroyed



Deforestation

Be part of the forests solution

Canopy's Nicole Rycroft says that engaging companies on innovative ways to decrease impact on forests is just as vital as focusing on the risks

The global marketplace has a tremendous role to play in reducing the loss of the world's ancient and endangered forests. When conscientious companies truly engage in taking responsibility for the future of our world's forests, it's amazing what can be accomplished.

For the past 15 years Canopy's mission has been to work constructively with forest product customers to help them shape and implement responsible purchasing practices. Today, we work with over 700 corporate partners from small local printers to global giants such as Penguin-Random House and clothing brand H&M.

As the last large tracts of intact forest come under increasing pressure, and the links between deforestation and climate change are increasingly evident, there is a growing awareness among forest product buyers of how their purchasing decisions can effect both reputational capital, investor confidence and the future of threatened species and ecosystems.

Reputation and supply risks

Regulatory changes – such as the EUTR and Lacey Act amendments in the US – have set off some warning lights, particularly for brands that are more risk averse. High profile campaigns – such as the Kit-Kat campaign and the work that the Rainforest Action Network and Greenpeace have done with Disney and Mattel – have helped to sensitise segments of the marketplace. No companies want to be the target of hard-hitting campaigns that can damage their brand.

Forest product buyers are also facing clear risks to business continuity. A large publisher or printer or a big international fashion brand reliant on forest based products such as rayon or viscose needs to know their supply chain is both stable and sustainable over the long term. Uncertainty in supply created through on-the-ground conflict, community rights issues, endangered species protection requirements or a downturn in forest fibre availability is going to dramatically impact business security. Companies are

increasingly finding it beneficial to track their supply chain and seek eco-alternatives or sustainable, certified fibre from forests free of conflict and uncertainty.

Internal champions

While risk is a very important filter for many in making decisions, it's important to remember that for numerous progressive companies, decisions aren't solely based on risk mitigation. Many have dynamic and visionary internal champions who are motivated by being part of a solution.

We're seeing the leading companies – those that are proactively addressing the negative aspects of their supply chains – eagerly seeking out long-term alternative solutions. For example, the brands who have signed on to Canopy's Fashion Loved by Forest initiative have not only committed to stop sourcing fibre from endangered forests, but to invest in research and development into the potential of recycled fabrics and non-tree fibre such as wheat and flax straw from crop residues as a source for fabric of the future.

It's at the policy implementation level where companies can be most impressive. Progressive brands not only have commitments in place on paper, but are starting to act on them and translate policy into real change. They use their



Nicole Rycroft

It is only when we get to economies of scale that we have industrial-level solutions

Straw could save 830m trees



purchasing power during contract negotiations to move from good intentions into eliciting commitments from suppliers that further protection of endangered forests, transform logging practices and lead to concrete change on the ground.

Global publishers such as Scholastic have been doing interesting things with their supply chains, as have clothing industry brands including H+M and Stella McCartney.

Scaling up

The challenge in bringing innovation up to scale is perhaps the crux of the problem. It is only when we get to economies of scale that we have industrial-level solutions that are going to solve the big problems.

For example the volume of straw available after the food grain harvest in North America, if manufactured into pulp, could replace the fibre of 830 million trees. Using this "second harvest" of agricultural waste would, in turn, allow those trees to continue to grow, provide habitat, filter water and absorb carbon from the atmosphere. But current pulp and paper infrastructure is based on turning trees into pulp, not straw into pulp. While some straw pulp is now reaching the market, we have documented over one million tonnes of unmet annual North American market demand for paper and packaging materials made of straw. The buyers are there, willing and ready to contribute to solutions with their purchasing power. The mainstream pulp and paper manufacturers have for the most part been resistant to the switch.

Helping to facilitate change at an industrial scale is an ongoing challenge. Solutions are moving from niche to being commercially available at scale. As more and more consumer companies support the development of sustainable alternatives and eliminate endangered forests and suppliers participating in deforestation from their supply chain, we're seeing breakthroughs in forest conservation efforts. It's just the start! ★

Business and deforestation

Make forests solutions practical, if not radical

Tony Juniper believes that while it's not too late to act on deforestation, there aren't any one-size-fits-all answers

Are you concerned that it's too late to save the world's forests given the current rates of deforestation?

No. We can save most of what is left and restore a lot of what has gone. Policies and actions being implemented in a number of countries demonstrate how it is possible to halt and reverse historic trends. Look at what has happened in Brazil and Guyana, and how even in Indonesia with its complex set of circumstances you can see a change of approach and real ambition in politics and among companies to do things differently.

This is not to say we have all the solutions yet, or that they are being deployed everywhere, but compared with 20 years ago there is very different narrative in play. As the world draws confidence as to the fact that solutions actually do exist then I think we're poised for a period of scaling up.

What are your favourite radical solutions? Is radical change the only answer now?

There are a number of things that are working. Some are linked with national laws while others are coming through new ways of managing supply chains. I don't believe that these need to be particularly radical, they just need to be practical and based on the realisation that the world has every good reason to save the forests so as to gain a range of economic and social benefits, not just environmental ones.

If there is a radical dimension to all of this it comes down to the new context for forest conservation, which is really about seeing it as a means of advancing security and wellbeing. Another factor that will increasingly drive the implementation of agreed solutions is the availability of more real time data that reveals, for example, illegal incursions enabling rapid enforcement.

How do the deforestation threats differ in SE Asia, central Africa and S America? Is it possible to develop a universal approach?

There is no single solution, but there are some common themes. One relates to the importance of seeing the full value of intact forest, rather than simply the resources that can be taken from or beneath them, in the form of crops, timber and minerals. Another is linked with the need for rural development policies to be at the heart of solutions – not simply drawing lines on maps to denote areas that are “protected”.

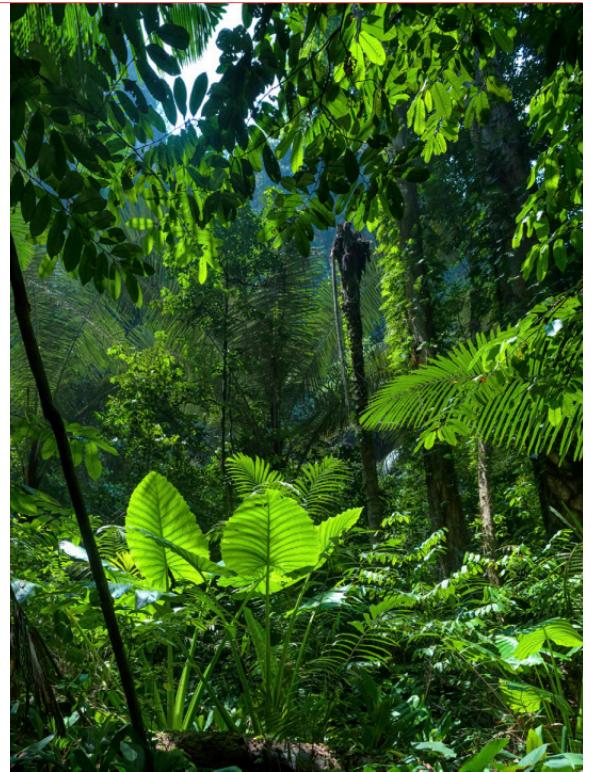
One more common agenda will be linked to how it will be possible to increase food output while stabilising or increasing forested areas. A group of major companies has confirmed they have the means to do this, but it will require a joined up approach, for example integrating strategies to increase the productivity of smallholders, improve access to market and decrease waste post-harvest through better storage facilities.

Another effective route that can be scaled up is linked with the land rights of indigenous and other forest dwelling people. It's not a panacea, nothing is, but in many cases it makes a positive difference, as has been graphically demonstrated in Brazil.

One more approach that crosses borders and that lends itself to different situations is through ‘payment for performance’ arrangements, as has been taken forward by Norway and Guyana whereby the richer country pledges to pay the developing one in relation to how effective they are in departing from historic rates of forest loss.

What do you think are the most pressing challenges around the high carbon stock approach?

The carbon dimensions of deforestation have been really important in placing forest conservation higher on the



Agreeing how to value forests is vital

international agenda, but like everything else there are important qualifications as to how best to reflect that particular value into actions on the ground.

One vital aspect is the need to place that alongside accurate assessments of other forest values, including local people's livelihoods, water and wildlife. Taking a view on the importance of a particular area of forest based on any one of these values will only ever give a partial view.

The world has every good reason to save the forests to gain economic and social benefits

How has a lack of proper governance and clarity over land ownership made things worse?

Most comprehensive investigations into the causes of and solutions to deforestation reveal the vital importance of good governance. This in turn relates to the quality and capacity of official bodies, the extent to which corrupt practices undermine even very good policies, the manner in which local people are or are not involved in decision-making and the extent to which vested interests can influence policy for their advantage.

All of that raises really fundamental questions about transparency in decision-making, the rule of law, democracy and public participation. There are various levers that can be pulled in moving toward better governance with the official donor community, international companies and non-governmental groups all having important roles to play in making progress in that direction. ★



Tony Juniper



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