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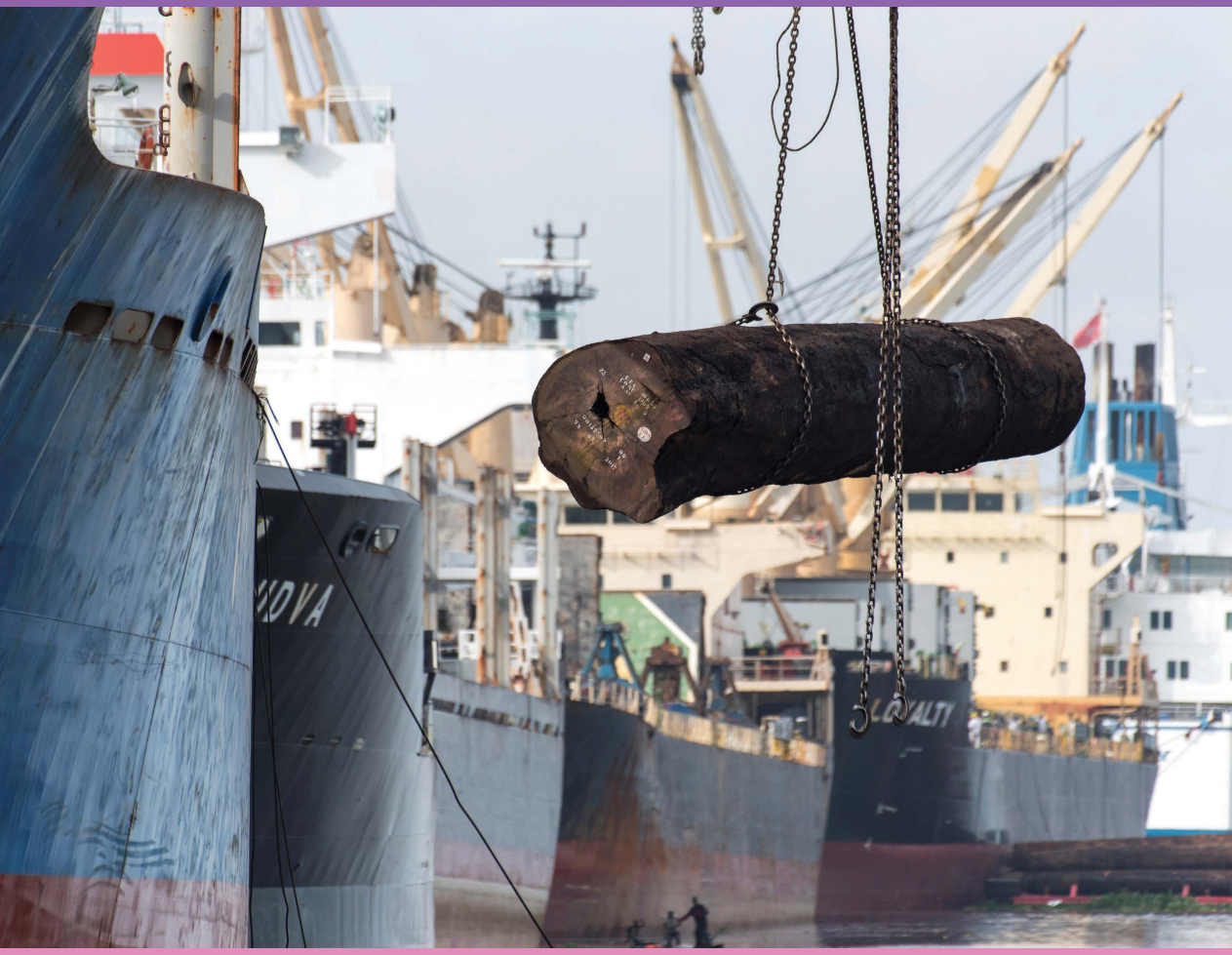
China in Cameroon's forests

A review of issues and progress for livelihoods and sustainability

James Mayers, Samuel Nguiffo and Samuel Assembe-Mvondo



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This research report has been prepared as part of the **China-Africa Forest Governance Project** – a multi-country project that seeks to improve forest governance, by promoting sustainable and pro-poor Chinese trade and investment in Africa's forest. Through research, dialogue and joint action with partners in China, Cameroon, the Democratic Republic of Congo, Mozambique and Uganda, the project contributes to improved policy and investment practice in China and Africa, in ways that foster good stewardship of forest resources and benefit local communities. The project is run by IIED with support from the UK government and partnerships with WWF and in-country practitioner teams with a strong track record of governance and enterprise engagement.

Country reports, as well as other thematic and sectoral research products, on the state of Chinese investments in African land use are free to download at pubs.iied.org.

For more information visit www.iied.org/china-africa-forest-governance-project.

The **China-Africa Forest Governance Platform,** launched in 2013, is now a well-recognised multi-stakeholder forum which strengthens mutual understanding, partnerships and joint actions on forest governance between China and Africa. Platform participants have also had influence in key international policy arenas. While the China-Africa Forest Governance Project has been the main supporter of the platform to date, other organisations continue to increase their involvement. The platform has thus far brought together forest governance players, including heads of government forest departments from nine African countries; representatives from the Chinese Academy of Forestry; the Global Environmental Institute; the International Institute for Environment and Development; the World Wide Fund for Nature; and other international organisations. As of 2019, the platform has held a range of trans-country dialogues and four major international learning events – two in China, one in Cameroon and one in Mozambique.

China in Cameroon's forests

A review of issues and progress for livelihoods and sustainability

James Mayers, Samuel Nguiffo and Samuel Assembe-Mvondo

The **Centre for Environment and Development (CED)** is an independent, non-political and non-governmental organisation founded in 1994. CED first focused on ecological, social and economic problems associated with forest management, and then extended its expertise to extractives sectors, land and climate change, defending people's rights and environmental protection. CED's aim is to contribute to the protection of the rights, interests, culture and aspirations of local communities, and to protect the forests of Central Africa. This is done by promoting environmental justice and sustainable management of natural resources in the region.

The **World Wide Fund for Nature (WWF)** is the world's leading independent nature conservation organisation. Its mission is to create a world where people and wildlife can thrive together. WWF has been present in Cameroon since 1990 and its objective here is to see the exceptional landscapes of Cameroon managed sustainably so that biodiversity is conserved, ecosystems functions and services are maintained, valorised and contribute to reducing climate change, while improving peoples' livelihoods and contributing to sustainable development.

About the authors

James Mayers is Group Director of the Natural Resources Group at IIED, Samuel Nguiffo is Secretary General of the Center for Environment and Development, Samuel Assembe-Mvondo is a consultant.

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Produced by IIED's Natural Resources Group

The aim of the Natural Resources Group is to build partnerships, capacity and wise decision making for fair and sustainable use of natural resources. Our priority in pursuing this purpose is on local control and management of natural resources and other ecosystems.

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Cover photo: The Douala–Bonabéri Port is Cameroon's principle port and also the largest seaport in Central Africa – a gateway for timber and other commodities to China and other world markets for Cameroon and it's landlocked neighbours, Central African Republic, Chad and the Republic of Congo. Douala will soon be rivalled by the huge new deep water port being built in Kribi, by Chinese contractors © Pierre Gleizes / Greenpeace

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This report has been prepared as part of the China-Africa Forest Governance Project, coordinated by the International Institute for Environment and Development (IIED). It draws especially on the following reports by the project (see References): Assembe-Mvondo (2019); Mala, Mougou, Kamkuimo and Nguiffo (2015); and Tieguhong, Sonne and Halleson (2015).

The China-Africa Forest Governance Project was launched by IIED and partners in 2014 and is dedicated to improving evidence, capacity and joint action for sustainable Chinese investment in Africa's forests. This project aims to create opportunities for improving policy and Chinese company practices in favour of sustainable land use and benefits to local women and men in Cameroon, the Democratic Republic of Congo, Mozambique and Uganda.

The project identified a lack of communication mechanisms among the relevant government agencies to share information and discuss overseas forestry investment and timber trade issues. Similarly, the private sector (eg timber importers and primary processors) are exposed to limited dialogue, exchange and capacity-building activities compared to other stakeholders. The project focused on building capacity and fostering dialogue among these stakeholders – policymakers, private sector actors, researchers, practitioners and journalists – through national, regional and international platforms; training; and work exchanges (Mayers, 2018). The project also supported the China-Africa Forest Governance Platform set up by IIED and partners in 2013. International learning events of the Platform were held in March 2013 (Beijing, China), June 2015 (Yaoundé, Cameroon), October 2016 (Beijing, China) and October 2017 (Pemba, Mozambique), enabling new research findings on the impacts and potential of China-linked land-use investments in Africa to be discussed and disseminated. They have also enabled African and Chinese stakeholders to jointly generate specific plans for policy and business improvements (Mayers et al., 2017).

The authors would like to sincerely thank the following people for their ideas, experience, hard work and guidance in this work: Stanley Dinsi, Patrice Kamkuimo, Qianru Ma, Leste Nyemgah, Ren Peng, Norbert Sonne, Xiaoxue Weng and Jingwei Zhang. The reviews of this report by Louis Putzel, Ji Lin and Brendan Schwartz are also much appreciated. Sincere thanks are also due to Khanh Tran-Thanh for coordinating the production of this report, to Clare Rogers for the copy edit and proofread, and to Judith Fisher and Cath D'Alton for the design and layout work. This research was funded by UK aid from the UK Government. However, the views expressed do not necessarily reflect the views of the UK Government.

Acronyms

BRI	Belt and Road Initiative
CAFGP	China-Africa Forest Governance Platform
CCAMCE	China CAMC Engineering
CCCC	China Communication Construction Company
CED	Centre for Environment and Development, Cameroon
CFC	Compagnie Forestière du Cameroun
CHEC	China Harbour Engineering Company
CIFOR	Center for International Forestry Research
CITES	Convention on International Trade in Endangered Species
COMCAM	Commerce du bois du Cameroun
CSO	civil society organisation
CWE	China International Water Electric Corporation
DRC	Democratic Republic of Congo
EDC	Electricity Development Corporation, Cameroon
EITI	Extractive Industries Transparency Initiative
EU	European Union
Exim Bank	Export-Import Bank of China
FLEGT	Forest Law Enforcement Governance and Trade
FMU	forest management unit
FODER	Forêts et Développement Rural
FSC	Forest Stewardship Council
GDP	gross domestic product
GEI	Global Environmental Institute
GFMC	Global Forest Management Committee
IIED	International Institute for Environment and Development
MINFOF	Ministry of Forestry and Wildlife
MoU	memorandum of understanding
MP	member of parliament
NESDA	Network for Environment and Sustainable Development in Central Africa
NGO	non-government organisation
NTFP	non-timber forest product
SEBC	Société d'Exploitation des Bois du Cameroun
SFA	State Forestry Administration, China
SGS	Société Générale de Surveillance
SOFOHNY	Société Forestière du Haut-Nyong
VFMC	village forest management committees
VPA	voluntary partnership agreement
WWF	World Wide Fund for Nature

Executive summary

Chinese investment in Cameroon is estimated to be worth twice as much as all of Cameroon's other investment sources combined. Around 80% is in infrastructure – roads, water, electricity, ports – with some in agribusiness and forestry. About 12,000 jobs have been created through these Chinese investments, with more than half of them in forest areas. China directly benefits from timber from these forests. China is Cameroon's biggest timber buyer and prefers raw logs, which accounts for around 85% of the total volume of timber exported to China. There may be a surge in these investments in the coming years, driven by China's Belt and Road Initiative.

But Chinese-linked trade and investments have major implications for forests and community livelihoods, with unsustainable practices by some companies, illegal logging, violation of laws, and poverty among the rural population. Weak implementation of the national and international regulations that apply to Chinese-linked investments, and a lack of dialogue between Chinese and Cameroonian actors, exacerbate these effects.

This report introduces the nature and scale of the issues involved, and how the China-Africa Forest Governance Project has engaged with them. It analyses the impact of Chinese-linked investments and companies on forests and livelihoods in the forest and non-forest sectors – agro-industries, mining and infrastructure. The report describes the efforts made through the project to improve policy and practice in China-Cameroon forest issues and outlines some ways forward.

Cameroon-China forest sector investment: getting out of control?

Cameroon has around 19 million hectares of forests, and a full spectrum of ways in which they are used – from low-level offtake and careful management to excessive, destructive exploitation and conversion to other land uses. The government attempts to control forest usage through a variety of plans, permits and concessions. Some of these are poorly framed and applied, and many are flouted. Illegal logging and forest conversion are major problems.

Timber has been an important economic sector for Cameroon, although its growth has fluctuated over the last 30 years. Cameroon is currently the fourth largest exporter of tropical timber by volume internationally. Historically the proportion of Cameroon's timber exports heading to Europe has been high, but in recent years concern about the legality of timber imported to Europe has led to restrictions. Efforts have been made,

with support from European governments, to put Cameroon's timber trade on a more sustainable footing, particularly with more transparency about revenue flows through local governance, and a system to guarantee that timber entering the European market from Cameroon is legally sourced. But implementation problems remain on both fronts.

The owners of the companies involved in the timber trade, and the rights to exploit forest areas, have also evolved over the years. Chinese involvement in forestry and the timber trade in Cameroon has risen recently – with China now Cameroon's biggest timber buyer. Some of the companies involved have predominantly Chinese capital, while others do not but focus on selling timber to China. While China prefers to import raw logs, prior processing in Cameroon has increased a little, as has the mix of species involved in the trade. However, the trade data is plagued with discrepancies.

Chinese companies themselves have expressed concerns about the costs of transport and the unstable policy environment in considering their future in Cameroon. In this, Chinese companies are little different from others, but the sheer scale of their collective involvement in the sector marks them out. The government of Cameroon meanwhile wants to derive more economic value from its forests and has made local processing a legal requirement for some species. But, after years of considerable progress in forest governance, problems caused by weak implementation have prevailed again recently.

The net effect on the forest is not very encouraging. Communities tend to get little return from forest exploitation, while the forest itself continues to be badly degraded in many areas and sometimes illegally converted. Indigenous communities are particularly hard hit. Community forestry – a programme with formal momentum over some twenty years now – has promised much and delivered rather little. Meanwhile, as agribusiness and infrastructure developments grow, secondary timber use and conversion timber volumes are rising and remain largely unregulated.

Policymakers need to get back on top of the situation, and new incentives for sustainable practices are needed for those involved in the timber trade with China.

Challenges in agro-industries, mining and infrastructure

Chinese involvement in agro-industries, mining and infrastructure projects in Cameroon is increasing. The Cameroon government estimates this to be worth about US$2.5 billion of new investment every year – much of it backed by China's Export-Import Bank. Is China different to any other investor? China has the same social and environmental responsibility challenges as any other country – and is perhaps prone to the same temptations to circumvent the intricacies of a flawed governance system. But as the country's number one investor, these effects are amplified, calling for closer scrutiny.

Intensifying demand for land for these investments and the government policy of encouraging foreign investment in the country have led to major concerns. These include the exacerbation of land shortages in rural areas; the risk to livelihoods, cultural value and identity provided by land; and the weakness of legal frameworks for ensuring accountability in governing land and investments.

Subsistence agriculture still dominates Cameroon's arable land, but agro-industries are growing in number and Chinese players are on the scene. While a substantial rice and cassava growing project is yet to prove a Sino-Cameroon collaboration success, two major rubber projects – one with established plantations, the other involving forest conversion to new plantations – have been taken over by the same parent Chinese company and have reportedly improved some local jobs and development initiatives. However, some problems with the ownership remain unresolved, including uncompensated land acquisition, dispossession by the government, failure to fulfil promises of employee share-ownership and poor employment conditions. Furthermore, in the new rubber plantation project there is a growing web of interconnected problems: high-level but opaque political involvement; questionable land titles; large scale displacement of local communities and indigenous people; high-value forest conversion and conversion timber trading; and rising environmental costs. Very recently, the company appears to be beginning to improve its standards – although this seems to be more in response to its international buyers' and investors' policies than to pressures within Cameroon or China.

While Chinese involvement in large-scale mining is yet to take off, a large number of small Chinese companies appear to be involved in small-scale mining. Indeed, Chinese businesses seem to have pioneered the industry in the early parts of this decade Chinese small-scale miners have joined the proliferation of activity in this sector, which remains substantially beyond government control.

China dominates the list of foreign investors in Cameroon's large-scale investment sectors. One of China's biggest port investment projects worldwide is underway in Kribi, as are a variety of roads, dams, power-plants and water supply projects – including the Memve'le hydroelectric dam, the Yaoundé-Douala motorway, and drinking water supply projects in four major cities. These projects generate a range of problems for forests and people, including forest conversion and social conflict. While good governance initiatives and better multi-stakeholder dialogue offer some hope of better corporate responsibility, infrastructure sectors see little interaction between Chinese and Cameroonian workers – or between companies and citizens. With China's Belt and Road Initiative advancing, there are huge challenges to making the right investments, and making them work well for Cameroon.

Efforts to improve forest policy and practice

Work by the partners in the initiative which has produced the analysis reported on here has also generated some momentum for improvements in Chinese investments in land use in Cameroon. Key players in Cameroon – non-government organisations (NGOs), community groups, government agencies, the media and some companies – have used previous drafts and findings from the analysis to stimulate dialogue and practical steps towards policy and practice changes. Dialogue at events organised by the China-Africa Forest Governance Platform has been influential, according to its participants.

Working in Chinese among the timber traders on the ground has produced more accurate information, shared understanding with others, and commitment to engage in policy processes and make improvements. The work of a new association of 23 Chinese companies in the timber trade in Cameroon holds much promise.

Engagement with large forest concession-owning companies exporting timber to China has been pursued by project collaborators WWF – with some capacity gains apparently made but with questionable impact on legality or sustainability to date. Connections between these companies and the Responsible Timber Exchange and commitment to the FLEGT legal timber agenda have also been strengthened. NGOs have also been supported with information and training in mechanisms for engaging with the Chinese timber industry. Negotiation with large Chinese infrastructure companies has been proven possible through the work of this initiative.

Some progress has thus been made in obtaining commitments from Chinese businesses to respect laws and source timber from sustainably managed forests in Cameroon and to increase engagement and capacity of local communities to secure benefits from a responsible timber trade with Chinese companies. Work to push for better community engagement practices in some infrastructure companies has also generated some momentum. Proof of the real intent of these companies will be revealed by their actions over the next few years.

Ways forward

There is little sign of a decline in the importance of the Chinese market for Cameroonian timber in the forest sector. Trees will continue to be cut down, but they need to be the right trees in the right places, and they need to be used better. A huge shift is urgently needed towards sustainability among small-scale timber traders; effective company associations will be critical here. Increasing and improving the amount of timber processing in Cameroon continues to be a vital way of generating more value locally, rather than exporting logs.

Chinese capital investments in small-scale mining and constructing hydro-electric dams present a reputational challenge. They have been associated with some lethal violence, significant ecological damage, non-compliance with existing socio-environmental legislation and abuse of local rights.

In the agro-industrial sector, there is now a basis for addressing social upheavals and misunderstandings between stakeholders: institutional platforms for dialogue between companies and local communities. These include indigenous peoples and companies' social and environmental management plan monitoring units.

We suggest some crucial ways forward, for each of the main stakeholder groups in turn:

China-linked forestry companies, small forestry enterprises and traders

- Develop the information and means to engage directly with other stakeholders, particularly through associations; notably the new association of Chinese forest sector companies.
- Continue steps to commit to, practice and verify legal and sustainable forest management in all forest management units.
- Timber-importing companies, financers and investors in China should commit to, carry out and verify legal, green procurement.

Chinese infrastructure and agro-industry companies

- Sustain the established forums for dialogue between companies and local stakeholders.
- Continue to monitor and implement environmental and social management plans.
- Systematically implement socioeconomic programmes that generate additional income for communities bordering major infrastructure construction projects.
- Improve current practices and procedures so that they exceed the basic requirements and meet international responsible investment standards.

Government agencies in Cameroon and China

- Intensify and accelerate the establishment of legality verification and traceability systems for wood products from Cameroon, in the framework of the VPA-FLEGT process and the development of the China Timber Legality Verification system.
- Follow through on revision in Cameroon of both land tenure legislation, to clarify land rights and avoid conflicts, and forestry law, to give communities more local control of forest and non-timber forest product (NTFP) resources

- Prepare a major push to implement legal and regulatory provisions in the mining sector then institute a period of closure of all semi-mechanised and artisanal mining sites to help re-establish the sector on a more regulated footing.
- Re-design the governance approach of the small-scale mining sector based on incentives and practical systems for regulation, which would include the means to ensure that: permits are held by appropriate entities; and operators systematically restore mining sites after operations have ceased.
- Enter into further bilateral negotiations between Cameroonian and Chinese forestry, agro-industry and mining authorities, so that both parties can use their leverage to deter illegal operations and foster sustainable ones.
- Strengthen awareness of Chinese state guidelines for responsible business conduct in overseas investments and pursue steps to make them binding in legislation.
- The Chinese government should also back more aid projects in forestry in particular. These should be based on joint needs assessment, context-specific design, and building organisations' capacity to support sustainable forestry.

NGOs working with government

- Improve the governance of infrastructure, agribusiness, mining and forestry developments by involving civil society and community representatives in establishing investment agreements before they are made, and throughout in overseeing and maintaining engagement in the process.
- Regularly monitor the implementation of social, environmental and technical specifications for investment projects, to spot any drift from objectives, make any course corrections, and ensure completed works comply with design.

The issues involved in China-Cameroon relations affecting land use are already huge, getting bigger and changing fast. Actions to engage with them have proven possible, and some gains have been made. Those who continue to build the evidence base for the right actions, the capacity to use it and the practical changes to make a difference will be doing forests and livelihoods a great service in the years to come.

1 Introduction

This report first introduces the nature and scale of the issues involved, what the China-Africa Forest Governance Project is and the methodology used in the report. Section 2 goes on to analyse the scale and impact of Chinese investments and companies in the forest sector. Section 3 analyses how Chinese-linked investment projects in non-forest sectors affect forests and livelihoods – agro-industries, mining and infrastructure. Section 4 describes the project's efforts to improve policy and practice in China-Cameroon forest issues. Finally, Section 5 outlines some ways forward.

1.1 How Chinese investment and trade affect Cameroon's forests and people

A bundle of big issues for forests and livelihoods in Cameroon – and China

"The flow of Chinese money and workers to Africa has prompted some to gush that China is becoming Africa's most important economic partner, and others to fret that it is the new colonial master. Yet others are more sceptical, arguing that many overestimate the sums that China is investing in or lending to Africa…Deborah Brautigam, who leads the China Africa Research Initiative at Johns Hopkins University, found that little more than half of announced Chinese loans to Africa actually materialised. Yet look beyond official loans or the work of big Chinese state-owned companies, and there are signs of a deeper Chinese involvement. McKinsey [a consultancy company] suggests that there are as many as 10,000 Chinese companies operating in Africa, 90% of them privately owned. Many also reported earning juicy returns, in some cases enough to pay back their investments in less than a year. Many said they planned to keep investing because of the plentiful opportunities to make money" (Economist, 2017).

China's Belt and Road Initiative (BRI) is also underway – reportedly weaving together a trillion dollars, more than 70% of the world's population and huge ambition. Called "one belt, one road" in Chinese, it aims to revive China's ancient transcontinental land and sea "silk roads". But there is little nostalgia in BRI. It is about roads, railways, ports, pipelines, power stations, industrial parks – and more. It is a trade bloc revolving around China and rules written by Chinese companies. It involves economic cooperation zones, financial regulation, high-speed internet, direct investment, education, culture, health, aid, tourism, foreign relations and politics (Huang 2016; Herrero and Xu 2019).

About 70 countries have signed memorandums to collaborate with China since BRI was first proposed by President Xi Jinping in 2013; the first were South Africa in 2015 and Egypt in 2016. Many other countries have entered BRI-related contracts or are sympathetic. So far in Africa, 'BRI countries' also include Angola, Kenya and Tanzania as 'anchor' countries along the Maritime Silk Road (one of the two main infrastructure and trade development channels of BRI). Others include Cameroon, Ethiopia, Nigeria, Morocco, Mozambique and the Republic of the Congo – each of which have investments in a deep-water port and related large-scale infrastructure projects and trade zones with Chinese involvement (Demissie, 2018). BRI countries worldwide account for some 4.4 billion people and about 40% of global gross domestic product (GDP) (Belt and Road Portal, 2019).

China expects its annual trade with countries along BRI routes to surpass $US2.5 trillion within the next decade. Estimates of the total value of China's investments in BRI projects worldwide range from an impressive $US340 billion to a mind-boggling $1 trillion (to a perhaps fanciful $8 trillion). Chinese banks have backed 2,600 projects with a total $US200 billion in loans in so far – banks such as the Export-Import Bank of China (Exim Bank), the China Development Bank, the Bank of China and the Industrial and Commercial Bank of China. A sovereign wealth fund, the Silk Road Fund, and the Asia Infrastructure Investment Bank – China's version of the World Bank – make the investments, mostly in the form of interest-bearing loans. Private Chinese investors also added $US15 billion last year (Eder, 2018; The Age, 2018).

Critics say that with China's economy slowing back home, state construction companies are being put to work abroad – exporting China's problem of excess capacity at the expense of other countries, which will get few skilled jobs and be left with white elephants and debt (Nantulya, 2019). Others have labelled BRI the most environmentally risky venture ever undertaken (Cimons, 2018; Ascensão et al., 2018), and some have begun to explore its specific existing and potential links to deforestation (Losos et al., 2019).

Some observers of the pronouncements and actions of African leaders note the freedom from conditionalities as the key attraction of China-backed investments in infrastructure building and resource extraction compared with the heightened economic, social and environmental conditions of the 'traditional' development partners. Some leaders hark

back to the days when China was designated a developing country – 'the first client of the World Bank' – and see the fast growth rate of China since then as a realistic development model to emulate. Yet, at both continent and of individual country level, cooperation with China is characterized by a huge political in-balance. China has an increasingly clear and well-resourced strategy for Africa – on how investments will be selected, how rights will be secured, how funding will work – while African countries often lack an expressed long-term vision of their relationship with China. Pragmatic, short-term decisions by African leaders on China-backed projects thus prevail, with little scope for citizen engagement (Nantulya, 2019).

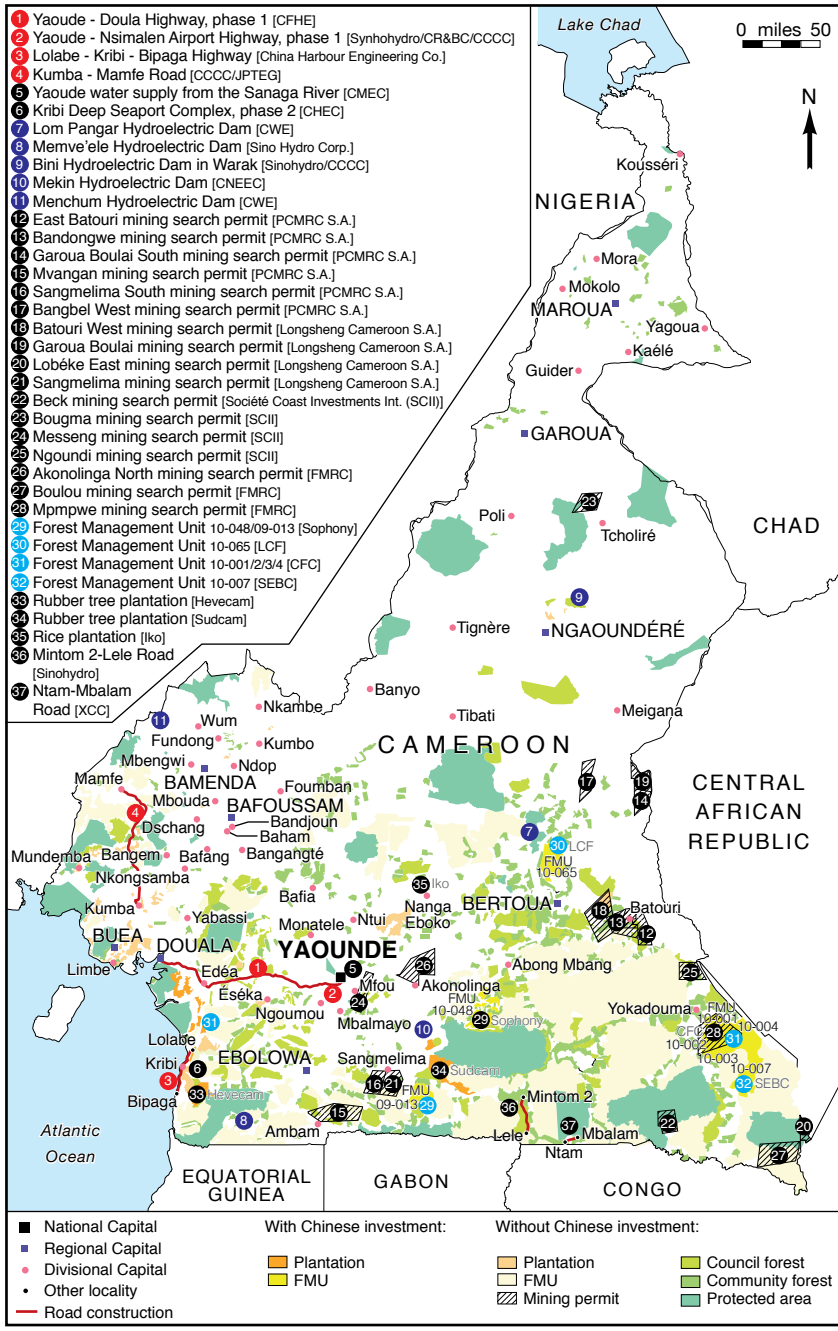
If Africa is to secure huge benefits and avoid huge costs from BRI, a wide range of effective planning, dialogue and negotiation processes will be needed. To date, whilst the Forum on China-Africa Cooperation has produced an action plan (MFA China, 2018), there appears to be no formal engagement between the African Union and China on BRI. This needs to be fixed, since if African governments lack a long-term strategy, BRI could become a one-way street, with Chinese government and private actors alone deciding what is good for development on the African continent (Demissie, 2018).

Cameroon is unquestionably hosting substantial Chinese investments and a wide range of different Chinese companies. China has become one of Cameroon's main economic and commercial partners, with annual investments averaging about US$400 million in recent years. And some of these investments are being made in forest areas (Figure 1). Unlike some African countries, particularly to its west, such as Ghana and Nigeria, Cameroon still has substantial forest resources and is currently one of the world's main tropical timber exporters (FAO, 2018).

Chinese-linked trade and investments have major implications for forests and community livelihoods, in the context of questionable sustainability of investments, illegal logging, violation of laws and poverty among the rural population (see Box 1). These are exacerbated by weak implementation of national and international regulations for Chinese-linked investments, and a lack of dialogue among Chinese and Cameroonian actors.

Chinese-linked investments in Cameroon's forest sector, and other sectors affecting forests, appear to have some positive effects; but also negative impacts that need to be addressed, according to some analysts. Significant local employment benefits and local economic development are yet to be clearly realised, and Chinese companies are viewed as only weakly respecting environmental laws and standards. These analysts have gone on to call on Cameroonian institutions to rise to the challenge of implementing regulations, coordinating different administrations and developing an effective national strategy on the viability and sustainability of investment projects (Assembe-Mvondo, 2019).

Figure 1. Chinese investments in Cameroon in 2018



Note: FMU – forest management unit.

Sources: CED for this study, and MINFOF and WRI (2018).

Box 1. Chinese investment in Cameroon – large scale and increasing pace

- **Chinese investment in Cameroon is worth twice as much** as all of Cameroon's other investment sources combined – 67% of Cameroon's US$5 billion in foreign direct investment in recent years, according to the United Nations Conference on Trade and Development.
- **80% of Chinese investment is in infrastructure** – roads, water, electricity, ports – with some in agribusiness and forestry.
- **85% of the total volume of timber** exported to China is raw logs.
- **12,000 jobs have been created** by Chinese investments, with more than half in forest areas.
- **China's Belt and Road Initiative** has provided a new driving force for investment from China in Cameroon. Initial focus on infrastructure projects may pave the way for a future increase in resource extraction investments.

Sources: Assembe-Mvondo, 2019; Cabestan, 2015; Eder, 2018; FAO, 2018; UNCTAD, 2018

China-linked companies and investments: the positive and the negative

Chinese companies' growing involvement in the forest sector since 2009 seems to have created few opportunities for local value addition from timber processing. The bulk of the exports are still raw logs, leaving little opportunity for Chinese companies to transfer timber-processing technology to Cameroonian operators (Mala et al., 2015). While some jobs have been created, only a small proportion of workers are reported to have social insurance, and workers complain of low salaries. Social obligations appear to be poorly delivered and corporate social responsibility programmes rarely implemented (Mala et al., 2015). Carrying out even simple environmental management plans is still a challenge, both for Chinese companies and the Cameroonian administration tasked with monitoring them. These issues are explored further in this report.

Recently there has been a marked rise in Chinese-linked investments projects in Cameroon. Of about 30 major projects currently planned or underway, about 11 are already affecting or set to have a major impact on substantial areas of forest, as this report discusses below. The value of these investments is estimated at around US$3 billion, representing more than 60% of the cumulative value of Chinese-linked investments in Cameroon over the last decade. Infrastructure investments play a big part, including roads (US$1,270 million in 2015), hydroelectric and electric infrastructure (US$931 million), mining (US$567 million) and port infrastructure (US$485 million).

Agriculture and agro-industrial sector investments – which generally require total forest clearances – have been estimated at US$53 million (see section 3).

Previous work has identified the perception amongst some stakeholders of strong positive impacts from some of these Chinese-linked investments, including capacity building among the workforce, the benefits of modern infrastructure itself, development and income generation around sites of projects, and access to markets for some agricultural localities, enabling regular crop sales. Negative impacts appear to be generally similar to those in the forest sector: a lack of effective technology transfer; a low level of workers registered in social insurance; and a failure to recognise and implement social obligations and environmental regulations and standards (Kamkuimo-Piam and Mayers, 2015). Some of the perceptions and assessments of these impacts are further explored below in this report.

Effects of regulation and guidance

National laws and regulations, and various international instruments, shape Chinese-linked investments within the forest sector and sectors affecting forests (mines, agro-industry and infrastructure) to varying degrees. Laws, charters and incentives on private investment, their implementing decrees and sectoral laws on forestry, mining, environment, land tenure and labour – and their associated regulations – all have influence. International instruments with some bearing on Chinese investments in Cameroon include: (i) Chinese guidelines and guidance applying to overseas investments, which are non-binding 'soft law' (eg guidelines produced by the Chinese State Forest Authority and Ministry of Commerce on sustainable forest management and environmental protection, and green guidelines produced by Exim Bank), (ii) Bilateral agreements between China and Cameroon on economic, commercial, technical and investment arrangements, and (iii) International legal and soft law instruments on governance and trade in natural resources management signed/ratified by Cameroon, which apply to Chinese-linked investments and associated trade. Examples of these international instruments include: the Central African Forest Commission treaty, the voluntary partnership agreement with the European Union on legal timber, the International Tropical Timber Organisation guidelines, the Extractive Industries Transparency Initiative commitments and the Kimberly process and its implementing decree in the mining sector (Putzel et al., 2011).

However, this rich policy and legal framework is only poorly and patchily implemented in Cameroon, and only some instruments are well recognised by Chinese companies and investors. Summarising available analysis in 2015, observers described inadequate implementation of even specific sectoral laws, and the inconsistent response of Chinese-linked investment projects to this framework of national and international instruments, which appear to exacerbate a largely negative national perception of the impacts of Chinese-linked investments in Cameroon (Kamkuimo-Piam and Mayers, 2015).

Wider analysis of some of the dynamics of the political economy in Cameroon help to explain the very patchy implementation of policy. Analysts have described a nexus between a kleptocratic regime and foreign investors which obstructs attempts to hold the latter to account. Ruled by a head of state in power for 36 years, the country has been described as plagued by corruption and rent-seeking at all levels, with little transparency, low democratic accountability and poor access to justice – and in such a situation it is extremely difficult for ordinary citizens, community organizations and civil society to obtain recognition of their rights, much less enforcement of them (Pigeaud, 2019).

China-Cameroon interaction and cooperation on forests

The official establishment of diplomatic and commercial relations between China and Cameroon began in 1971, triggering a flow of high-level meetings, economic and commercial bilateral agreements, and participation in regional cooperation initiatives between China and Africa. More recently, the Cameroon government set up a special division for relations with emerging countries, including dealing with Chinese investors, within the Ministry of Economy, Planning and Management of Territory (Cabestan, 2015). Cameroon has also been active in the Forum on China-Africa Cooperation since its launch in 2000 and has participated in a dialogue initiative between the Central African Forest Commission and the Chinese State Forestry Administration on improving the sustainability of Chinese forest management operations (Kamkuimo-Piam and Mayers, 2015).

With growing Chinese company involvement in the forest sector, and with increasing attention from civil society on its effects – particularly given the major efforts to establish a verified legal timber trade between Cameroon and Europe – Cameroon government agencies have increased their efforts to engage with their Chinese government counterparts and with Chinese businesses. A memorandum of understanding on forest issues is in development, and various skills and information exchanges have taken place. But the level of information and joint capacity needed to overcome key governance weaknesses and change company practices have yet to achieve a critical mass. This has been the rationale for the work of the China-Africa Forest Governance Project in Cameroon.

1.2 Methodology

Between 2014 and 2018, the China-Africa Governance Project aimed to develop opportunities to improve governance in the forest sector in Cameroon, and to improve China-Africa cooperation in favour of sustainable investments in land use. It aimed to do this by: 1) developing and sharing information among African and Chinese teams in the project; 2) improving the understanding of Chinese engagement in Cameroon; and 3) creating and taking opportunities to give Chinese engagement a 'green push' towards best practices.

The project partners recognised that significant political space had been created by prior work on improving forest governanceincluding through the Forest, Law Enforcement, Governance and Trade (FLEGT) and through work on forest certification. The Government of Cameroon's involvement in the Extractive Industries Transparency Initiative (EITI) also seemed significant, providing an opportunity for effective dialogue on accountable and holistic governance of natural resources. But recent compliance audits have found only weak implementation of EITI in Cameroon and analysts have questioned its impact in the oil sector (Gauthier and Zeufack, 2009). Thus, as it developed, the project sought to inform FLEGT and EITI processes rather than engage with them as key arenas for dialogue as originally anticipated.

The Centre for Environment and Development (CED), the Network for Environment and Sustainable Development in Central Africa (NESDA), and WWF Cameroon steered the work of the project in collaboration with IIED. A team was formed which liaised regularly with the Forest Governance Learning Group in Cameroon, with which IIED had also been associated for several years, and with government agencies, the private sector and a range of organisations doing complementary work, such as the Center for International Forestry Research (CIFOR).

The main methods employed in the China-Africa Forest Governance Project were:

- **Research.** The project carried out a 'diagnostic' or situation analysis – on China-linked investments in Cameroon and associated forest governance issues. This was done early in the initiative through desk-based review, interview and dialogue with key informants. The team then researched key issues in a range of relevant non-forest sectors – agribusiness, infrastructure and mining – and on forestry investments and the timber trade. They also drew on analysis from, and offered analysis to, colleagues in the wider China Africa Forest Governance Project in other countries (notably China, DRC and Gabon), and translated and developed key evidence products. This report comprises the original diagnostic, updated and enriched with findings from these further studies and dialogue through the project.
- **Capacity and dialogue.** Training and mentoring, within the project team, built capability to engage with key relevant policy processes and investment practices. Th first draft 'diagnostic' and other evidence products were explored, and their findings verified, improved and spread through participation in the China-Africa Forest Governance Platform and through contributions to the Forum on China-Africa Cooperation and other dialogue initiatives. Work was carried out to engage with Chinese investors and to support improvements in organisation and practice. Collaboration with journalists to cover relevant issues was also productive.

- **Policy and investment practice improvement opportunities.** Collaborative assessments of the challenges facing a range of individual China-linked companies were undertaken and dialogue with them was then focused on development of commitment to improvement in legality and implementation of codes of practice. Support to the information base and organisational arrangements for effective association of companies and traders was also explored, as was identification of specific policy improvement targets that the organisations mentioned above could focus on in their subsequent work. The degree of effectiveness of this work is described in section 4 of this report.

It is worth clarifying at this point what 'Chinese companies' means in this report. Some of the big companies operating in Cameroon, typically overseeing or contracted to deliver infrastructure investments and backed with concessional finance or other incentives from the Chinese state, are clearly Chinese companies even if they have complex corporate structures (and such complexity is not unique to Chinese investment, but a characteristic of international investment and trade). However, at the smaller end of the spectrum it is not so easy to distinguish between 'Chinese' and 'Cameroonian'; this is a grey area. Some companies may be known as Chinese when they are owned by someone who looks Chinese but holds a local passport. Some are registered locally in Africa but owned by a Chinese national or are local units of companies based in China.

The overwhelming majority of 'Chinese companies' in Cameroon, and elsewhere in Africa, are small and micro businesses that are locally incorporated (Brautigam, 2009). From a legal and statistical standpoint, this makes them local enterprises even if they are Chinese owned. And in most cases, they are not the tentacles of Chinese state interests. Much Chinese Foreign Direct Investment (FDI) in Cameroon is in small-scale private ventures, such as restaurants, shops and small farms (Cabestan, 2015). However, oftenthese businesses tend to be registered by Chinese migrants who invested the savings they earned locally as employees. The capital built up by these businesses is not only small, but strictly speaking neither is it Chinese foreign direct investment – as it is not the result of any financial flow from China to Cameroon. This discussion and distinctions need to be borne in mind in the analysis that follows.

2 Cameroon-China forest sector investment

2.1 Forests and their commercial use in Cameroon

Natural resources in a troubled state

While Cameroon is endowed with rich natural resources, it has struggled to build a thriving and sustainable economy on their management. Having enjoyed stability for many decades in spite of its diverse population, Cameroon is currently grappling with attacks by Boko Haram in the Far North and a secessionist insurgency in the Anglophone regions. Since September 2017, this insurgency has claimed the lives of over 200 military, gendarmerie, and police officers, and more than 400 civilians (World Bank, 2019).

Weak transparency, low democratic accountability and poor access to justice prevail in Cameroon (Pigeaud, 2019). Significant forms of organisation for most citizens tend be of the form of ethno-regional associations rather than civil society organizations based on horizontal bonds and solidarities, and in practice 'the state' and 'civil society' are highly inter-digitated on the ground (Konings, 2009). Corruption in the natural resource sectors has been described as endemic – with increasing conflict over control of networks of corruption – and it has been argued that corruption becomes a root cause of policy failures when disillusioned state officials perceive that those at the top of the pyramid do not have the legitimacy needed to promote reforms (Cerutti et al., 2013; Hoare, 2015).

Lots of forest, lots of ways to cut it down

There are approximately 19 million hectares of dense forest in Cameroon, covering 40% of the country's territory (MINFOF and WRI, 2018). Cameroon's forest sector is important for the economy, accounting for about 4% of GDP. It is a significant employer, particularly in rural areas; about 23,000 people were directly employed in the formal forest sector in 2011, while an estimated 50,000 people were directly employed in informal small-scale logging and processing in 2010 (Hoare, 2015). Various forms of title permit commercial logging: forest concessions (forest management units), communal forests, community forests and permits for sales of standing volume; as well as 'small permits', which include timber exploitation permits, and timber recovery and wood removal permits. These last two are supposed to be for harvesting the timber resulting from deforestation linked to development projects.

Analysis in 2016 suggested that there were 91 forest concessions in Cameroon, of which 79 had approved management plans covering 6.3 million ha. There were also 90 sales of standing volume permits (136,181 ha) and 34 council forests (830,000 ha, of which just 587,000 ha were active). The same analysis noted that in 2014 there were 301 community forests (1,743,594 ha, of which less than half were active) (Cerutti et al., 2016). Previous estimates in 2013 found that concessions and communal forests accounted for about 78% of formal timber production in recent years, while community forests and various other types of permit (mostly small permits) accounted for 22% (Eba'a Atyi et al., 2013).

Beyond the regulators' reach: illegal logging and forest conversion

Despite government efforts to ensure all commercial offtake is controlled, analysts have estimated that official production accounts for just half of harvesting levels. Official national production between 2004 and 2008 was estimated to average about 2.2 million cubic metres of roundwood equivalent per year, while informal production (using 'chainsaw mills') was estimated to be 2.1 million m^3 per year (Cerutti and Lescuyer, 2011).

Deforestation continues in Cameroon. The main drivers are reckoned to be conversion to agriculture, from both large and medium-scale plantations, as well as smallholders, fuelwood harvesting (an estimated 12 million m^3 is harvested annually), mining and infrastructure development. While these result in forest loss, unsustainable and illegal logging cause forest degradation. Large-scale land acquisitions have been increasing and may be further stimulated by the government's long-term development strategy, which foresees large-scale investment in infrastructure and developing the agricultural and mining sectors. Forest conversion is therefore becoming an increasingly important source

of timber in the country – and some of it is illegal, according to analysts (CED, 2013). There is evidence of illegal allocations of small permits for timber extraction linked with infrastructure and agribusiness projects (Global Witness, 2013; Lawson, 2014).

2.2 Cameroon's timber sector and the China connection

Growth in the timber sector, and government attempts to benefit forests and people

Timber production in Cameroon grew for the first forty years after independence in 1960, with major peaks and troughs along the way. Production greatly increased during a substantial economic growth period from 1975 to 1985, and again from 1994 to 1997, thanks to currency devaluation and increased demand driven by an Asian economic boom (Eba'a Atyi, 1998; Wunder, 2003).

The government adopted a new forest law in 1994, followed in 1995 by an implementing decree (Republic of Cameroon, 1994; 1995). The old system of logging licences granted in a discretionary manner was to be stopped and, for the first time, sustainable forest management became the central requirement. New logging concessions had to be allocated via public auctions and managed according to approved forest management plans (Karsenty, 2006). Each company bidding for a logging concession had to present evidence that they owned an operational sawmill in the country, as part of legal prescriptions to increase processing capacity within Cameroon. A log export ban, albeit partial (not extended to all timber species), became effective in 1999. Also in the late 1990s, logging area taxes were increased and a tax redistribution system was introduced with the aim of benefiting rural citizens living around logging concessions (Cerutti et al., 2010).

The objectives of the 1994 law have only been partially pursued and attained. Although most logging companies in Cameroon now own one or more sawmills, there is little secondary processing; the main approach is to produce sawn wood and export it to the companies' headquarters, for instance in the European Commission or China, where further processing creates the end products. In terms of greater benefits from revenues, around €90 million was redistributed to about 50 rural councils a year on average, reaching around 1.1 million citizens between 2000 and 2009. While these revenue flows continue to be significant, local development impacts have been slow to materialise because of a range of governance problems at local level (Oyono, 2005; Cerutti et al., 2010).

The grip on the sector in changing hands

Logging in Cameroon has always been a capital-intensive activity dominated by foreign capital, but the sector has undergone many changes and has played different roles in different periods. For much of the last century, European companies, mainly French, dominated the scene. By 1992, six European companies controlled about 75% of timber exports, with several active companies from the Middle East (mainly Lebanese). Southeast Asian companies, notably Malaysian, began to establish forestry operations following the 1994 devaluation (Eba'a Atyi, 1998).

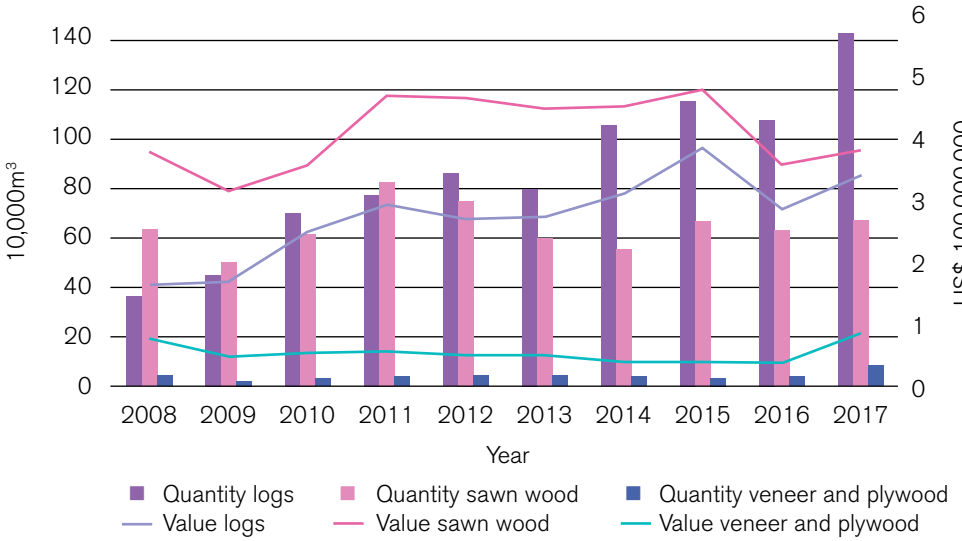
Economic crisis hit some Asian countries in 1997. Exports from Cameroon to countries such as Japan and the Philippines almost halted soon after, and the Malaysian companies which had started operating in Cameroon only a few years previously abandoned operations. However, direct exports to China, and indirect exports via Hong Kong to mainland China, were by then established and proved able to weather the storm and gradually increase through the subsequent decade (Cerutti et al., 2011). China's forest sector meanwhile became characterised by a rise in wood processing capability coupled with a huge shortfall in supply. This translated into a marked preference for importing logs rather than sawn wood (Kozak and Canby, 2007).

2.3 Rising Chinese imports from Cameroon

Cameroon: a major player in tropical timber exports

In 2016, Cameroon ranked fourth among tropical timber exporters worldwide by volume (and third by value), exporting more than any other African nation (FAO, 2019a). Its main export destinations are the EU (21%) and Asia (78%). In 2016, Cameroon's total import and export of forest products reached US$731 million, of which exports contributed about 93%. Cameroon's main timber exports are sawn wood, logs and veneer (Figure 2).

Figure 2. Cameroon's forest product exports, 2008 to 2017



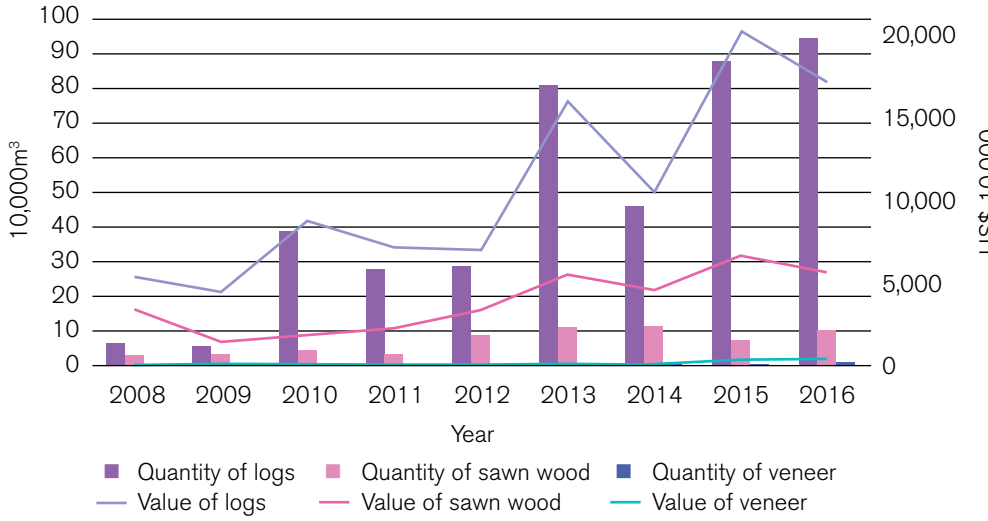
Source: FAO (2019a)

China: the main buyer of Cameroon's timber

The main destinations for Cameroon's logs include China, Belgium, Italy, Vietnam, France and Spain, of which China is the largest importer, accounting for 29% of Cameroon's forest product exports by value in 2016 (FAO, 2019a). Three quarters of these exports were in the form of industrial 'roundwood' (unprocessed timber in the form of logs), accounting for just under half of Cameroon's roundwood exports. Most of the remainder exported to China was sawn wood (Figure 3).

As described above, China became a minor but slowly growing importer of Cameroonian timber from the late 1990s. But with the global financial crisis in 2008, demand in European markets fell, and Asian countries became increasingly important importers. In 2016, China's share of Cameroon's log exports was 43% and its share of sawn wood exports was about 16%. Cameroon is among China's top twelve largest sources of log imports in terms of value. China's imports of sawn wood have also increased gradually over time, accounting for about 13% of Cameroon's sawn wood exports since 2008. In the decade from 2007 to 2016, China imported a total of 4,972,746 cubic metres of logs, 702,976m^3 of sawn wood and 13,936m^3 of veneer from Cameroon (FAO, 2019b). While Cameroon's restrictions on log exports of certain species have had some effect in limiting its log exports and promoting its sawn wood exports, the overall impact is rather indistinct – as can be seen from Figure 3.

Figure 3. Cameroon's forest product exports to China, 2008 to 2016



Source: FAO (2019b).

2.4 Who is exporting all this timber to China?

Some companies have predominantly Chinese capital

This project identified 19 companies with primarily Chinese capital operating in Cameroon's logging sector in 2015, with combined harvesting rights covering 653,000 hectares (Mala et al., 2015; Tieguhong et al., 2015) (Table 1 and Figure 4). These logging titles are concentrated in the southeast area of Cameroon's East Region.

Table 1. Forest harvesting rights awarded to Chinese companies and partnerships with primarily Chinese capital in Cameroon, 2015

Logging rights	No.	Title No.	Company abbreviation	Commune	Concession sub-division	Total area (ha)	Volume (m^3)	Plot area (ha)	Ownership
Forestry concession	1	1004	CIBC	Moloundou	4-1	130,273	46,126	3,576	Chinese
	2	1010	SEBC	Salapoumbé	4-2	122,294	23,727	4,079	Chinese
	3	1013	SAB	Salapoumbé	4-2	48,554	11,895	1,403	Chinese
	4	1025	CFC	Yokadouma	3-1/4-3	193,105	57,540		Chinese
	5	1064	COFA	Mvangane	2-3/2-4	66,007	44,211	4,611	Partnership
	6	1084	SOFOHNY	Messamena/ Somalomo	2	68,030	36,311	2,500	Chinese
National sale of standing timber	7	09 01 209	JEAB	Djoum			50,049	2,117	Chinese
	8	09 03 225	LEFANG	Mvengue			37,025	2,437	Partnership
	9	09 03 304	SALI NDJIDA	Kribi 1			109,443	2,032	Partnership
	10	09 03 305	SEXTRANSBOIS	Kribi 1			79,521	1,330	Partnership
	11	09 03 306	SBAC	Kribi 1			45,277	1,920	Partnership
	12	09 03 307	BOISCAM	Kribi 1			71,396	2,224	Partnership
	13	09 03 309	SOCEF	Kribi 1			32,007	978	Partnership
	14	09 03 312	SEXTRANSBOIS	Kribi 1			68,069	1,375	Partnership
	15	09 03 315	SALI NDJIDA	Lokoundjé			29,613	1,042	Partnership
	16	09 04 200	LEFANG	Ma'an			82,375	2,011	Partnership
	17	10 01 220	CFC	Salapoumbé			47,809	2,443.5	Chinese
	18	10 01 221	SEBC	Salapoumbé			51,650	2,389.5	Chinese
	19	10 02 209	SOFOHNY	Lomié			54,495	2,500	Chinese

Source: Mala et al. (2015).

Four of these 19 companies were formerly under French ownership and are now owned by one group, Vicwood-Thanry, based in Hong Kong. Vicwood-Thanry formed the first substantial Chinese capital investment in the Cameroon forest sector in 1998, when the group acquired the Cameroonian forestry operations of a French group (Group Thanry). Vicwood-Thanry reportedly holds nine forest management units in six forest concessions through its subsidiary companies, totalling about 570,000ha; equal to around 10% of all forest concessions in Cameroon (Tieguhong et al., 2015). We note that Article 49 of the 1994 Forest Law states that the total area allocated to a single company cannot exceed 200,000 ha. These subsidiary companies include: Compagnie Forestière du Cameroun (CFC); Compagnie Industrielle du Bois au Cameroun; Société Africaine de Bois; and Société d'Exploitation des Bois du Cameroun (SEBC). One of the group's subsidiary companies is estimated to export about 75% of its harvested logs to China; some European-owned logging companies operating in Cameroon may export even higher proportions to China (Tieguhong et al., 2015; Pepke et al., 2016). The Vicwood-Thanry group also exports some sawn wood to China as well as to other markets (Cerutti et al., 2011; Khan and Baye, 2008; Tsounkeu and Halleson, 2014; Tieguhong et al., 2015).

The Ministry of Forestry and Wildlife (MINFOF) appears to have approved Vicwood-Thanry group companies' management plans for the forest management units they operate. One other company with primarily Chinese capital, Société Forestière du Haut-Nyong (SOFOHNY), also manages a forest management unit (FMU); but it is not clear whether this is guided by an approved management plan. The lack of transparency around these plans is of concern since such management plans are supposed to be freely available in the public domain.

In addition to long-term forest concessions, Cameroon's 1994 Forest Code recognises two other types of harvesting right: sales of standing volumes (more commonly known by the French term '*vente de coupe*') of timber on areas of up to 2,500ha; and small titles for limited harvesting of up to 300 cubic metres of timber (supposed to be for small-scale local use). Increasingly, sales of standing volumes of timber are used for "salvage timber" – in areas to be converted from forest to other uses. However, some areas forest conversion are clearly much larger than the 2,500 ha limit of sales of standing volumes of timber. The Ministry of Forests has thus recently introduced the practice of issuing logging titles in areas earmarked for conversion as "special" sales of standing volumes of timber, granted at the regional level (and not by the designated national body as prescribed by the legislation) (Hoare, 2015).

In 2016, Chinese companies were obtaining timber from seven areas with sales of standing volumes: Vicwood-Thanry's SEBC and CFC were harvesting timber from two such areas; while four other companies, SOFOHNY and three others, were accessing five other such areas. Some of these sales of standing volumes were allocated to Chinese companies close to major infrastructure projects, such as the deep-water port of Kribi and

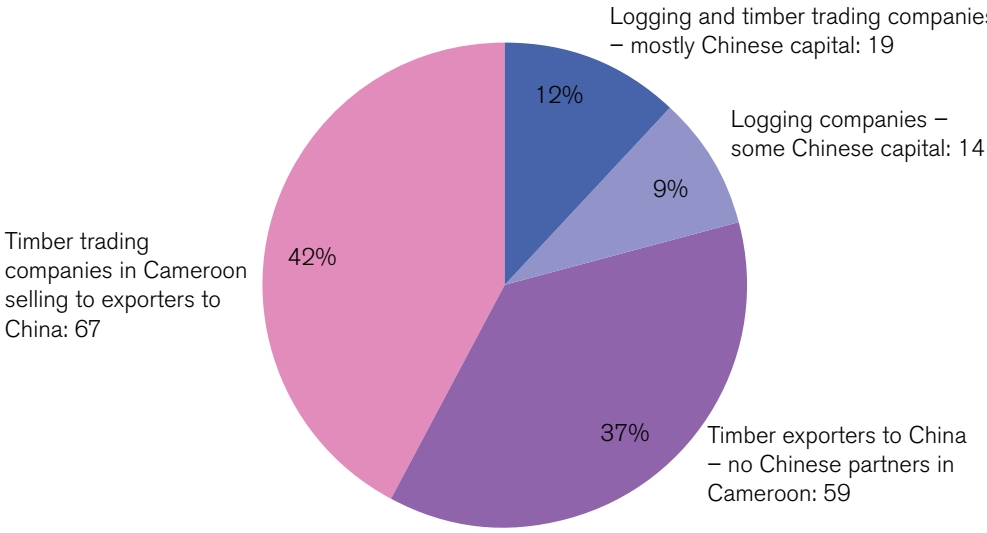
the Memve'ele hydroelectric dam project (see Section 3.5). This forest harvesting appears unlikely to be driven by a longer-term perspective on forest management.

While it is possible that some of the other 11 Chinese companies identified by this project are involved in logging, they are thought to operate primarily as traders in timber, buying from other companies. Some of them may, however, have access to sales of standing volumes or timber from community forests (see Section 2.6). This project understands that these 11 companies, along with the 8 Chinese capital companies mentioned above, are 'Chinese' in that they are headquartered in China. However, the project was not able to prove this conclusively in all cases. Some of the companies in the other categories in Table 1 may have ethnic Chinese owners, but these owners may be of various nationalities and may not have headquarters in China.

Some companies only sell timber to China

This project identified a further 14 timber companies which operate in Cameroon with capital from a Chinese partner. It also estimated an additional 59 companies, including most of the big European-owned companies, that export some wood to China. Finally, the project estimated that another 67 companies, which do not export to international markets, sell some of the wood they produce to Chinese and non-Chinese companies in Cameroon which then export it to China (Figure 4).

Figure 4. Chinese companies and companies exporting to China in Cameroon's forest sector, 2015 estimates



Total number of companies: 159
Sources: Data from Commerce du bois du Cameroun (COMCAM), Système Informatique de Gestion de l'Information Forestière, Ministry of Forestry and Wildlife and Port of Douala; cited by Tieguhong et al. (2015).

There is also evidence of connections between small–scale loggers and Chinese wood traders, notably in bubinga wood (see below). While there are likely to be at least short-term local benefits, the state cannot condone this type of informal trade, as it cannot integrate it into its formal systems to oversee sustainable forest management (Weng and Putzel, 2017).

Exporting logs, sawn wood and various timber species

In the five-year period up to 2015, of the estimated 33 companies with some or predominantly Chinese capital in the logging and timber trade, 42% dealt only in logs, 39% in logs and sawn timber and 19% in sawn timber only. Of the 59 exporters of timber to China without Chinese partners, 14% exported only logs, 27% exported sawn timber and 59% exported both logs and sawn timber (Tieguhong et al., 2015).

It appears that Chinese timber companies have turned their attention more to African hardwood in general, and Congo Basin hardwood in particular, after developments in Southeast Asia such as the ban on merbau (*Intsia bijuga*) exports from Indonesia in 2002 (Lei, 2017). And in general, China's forest sector in recent years has been characterised by a huge rise in wood processing capability coupled with restrictions and shortfalls in supply, which translated into a marked preference for importing logs as opposed to sawn wood (Kozak and Canby, 2007).

Some 60 species of timber have been exported from Cameroon to China in recent years in the form of logs, 46 species in the form of sawn timber, 1 in the form of veneer and 2 in the form of plywood. Species exported as logs to China in the highest volumes are bilinga (*Nauclea diderrichii*), dabéma (*Piptadeniastrum africanum*), ayous/obéché (*Triplochyton scleroxylon*), okan (*Cylicodiscus gabonensis*) and tali (*Erythropleum ivorense*). Species from Cameroon in high demand in China also include bubinga (*Guibourtia demeusei*) and wenge (*Millettia laurentii*) for furniture; okoume (*Aucoumea klaineana*) for veneer; and afrormosia (*Pericopsis elata*) for flooring (Tieguhong et al., 2015; Lei, 2017).

About 77% of all wood exported in log form to China in the five-year period up to 2015 were 'promoted species' – formally promoted for export by the Cameroon government. However, another 10% were 'principal species', meaning they should have been processed into sawn timber before export. Thus, the COMCAM data appears to demonstrate that substantial volumes of principal species like sapelli (*Entandrophragma cylindricum*), movingui (*Distemonanthus benthamianus*) and mukulungu (*Autranella congolensis*), have been illegally exported to China as logs.

Of the sawn timber volumes exported to China, 48% were from principal species, 20% from wood species with defined processing quotas, and 32% from two categories of promoted species. COMCAM data also reveal that 13 companies, one of which research

suggests is predominantly founded on Chinese capital, have been exporting increasing amounts of three main 'special products' to China over the five-year period to 2015: ebony (*Diospyros crassiflora*) wood; raffia palm (*Raffia hookeri*) kernel seeds; and yohimbe (*Pausinystalia johimbe*) bark (Tieguhong et al., 2015).

The data is plagued by discrepancies

Substantial discrepancies in data between sources plague the analysis described above. While the analysis has mainly focused on COMCAM data, it has also used data from SIGIF, MINFOF and Douala Port II. The biggest discrepancy appears to be between the COMCAM data and that of Douala Port II on volumes exported to China in the form of logs and sawn timber. Particularly stark is the discrepancy in 2013, with the port data showing 105,353 more cubic metres of logs exported than COMCAM's figure for logs exported. The discrepancy for sawn timber is even greater, with the port data recording 274,374m^3 more than COMCAM. Clearly, at least one of these sources is incorrect.

Trade data discrepancies can be indicative of illegal activity. However, the data referred to above is perhaps not sufficiently robust to be analysed in this way. Another factor may be that Cameroon is a transit country for timber from the Central African Republic and the Republic of Congo; some discrepancies may be due to timber from those countries being reported as Cameroonian timber. However, it is clear that the lack of comprehensive and reliable data seriously hinders the government's efforts to monitor the sector and the timber trade (Hoare, 2015). It is also clear that many years of support for developing such reliable data, including under the FLEGT support programme, have been undermined by the systemic weaknesses and manipulation of the natural resource governance system (Global Witness, 2013).

Chinese companies keep a wary eye on the future

From the point of view of Chinese companies involved in the timber trade, transport costs appear to dominate their cost calculations. Much of this concerns the large distances from forest to port, and costs of shipping to China. But many also refer, for example, to spare parts for machinery having to be flown in by air at great cost. Other challenges expressed by Chinese enterprises in the region include their difficulties understanding local culture and laws, compared to longer-established companies with investors from Europe (Lei, 2017).

Some Chinese enterprises perceive the policy environment to be unstable. In nearby Gabon, several Chinese enterprises reported being caught out when the log export ban, which their business planning expected in 2015, was actually introduced four years earlier in 2011. However, analysis by this project suggests that government policy promoting more processing in Cameroon is likely to be effective over time. At least some Chinese

companies, spurred on by variable but generally growing demand in China, will find ways of managing economic risks and investing in processing in Cameroon (Lei, 2017).

2.5 How a growing timber trade with China affects Cameroon's forests

Cameroon's government, like others, wants more economic value from its forests

Timber harvesting in Cameroon has always been very selective – some species are logged while others are left – as loggers weigh up the various technical, commercial and financial factors (Hardin, 2011). Logging in Southeast Asia, while selective, is much more intense than in Central Africa, with volumes harvested from dipterocarpaceous forests (a family of trees chiefly native to tropical Southeast Asia) sometimes exceeding 100 cubic metres per hectare (equivalent to 10 to 12 trees). With logging regulation often ineffective, this has in many Southeast Asian countries led to the severe degradation of forest resources, often followed by deforestation due to fires or agricultural conversion.

In Central Africa, by contrast, selective logging has been much less intense – on average, ten times less than Southeast Asia (Karsenty and Hardin, 2017). For example, in areas where the potential availability of commercially valuable timber is estimated at about 34m^3 per ha, only 0.7 trees, or 8m^3 per ha, were harvested over the period 2000–09 (Cerutti et al., 2011). The two main reasons for this lower intensity in Central Africa are the greater heterogeneity of forest stands – with diverse species rather than a small number of concentrated species – and the lack of transport infrastructure. As a result, timber concessions in Central Africa have not generally been intrinsic drivers of deforestation; especially when logging is highly selective, or compared to clearcutting for agriculture, mining or energy infrastructure (Karsenty and Hardin, 2017). Nevertheless, fragmentation of forest areas by logging, and establishment of roads and other infrastructure, are proven to often initiate a cascade of changes that lead to deforestation and forest degradation in the Congo Basin (Potapov et al., 2017).

However, to try and avoid a situation where logging companies quickly empty their concessions of the most valuable species then abandon them, forest policy has generally sought to encourage the use of 'secondary' timber species (or 'promoted' – see Section 2.4 above). Government policy has recently stated its aim of increasing revenues from forest taxes and redistributing that revenue to rural councils to improve livelihoods.

While this increase in the number of secondary species in the market might increase the ecological impact per area, it could slow the pace at which forests are opened to harvest and enhance the forest sector's economic benefits. As noted above, large numbers

and high volumes of secondary species have been exported to China – in much higher proportions than Cameroon's timber exports to the EU (Cerutti et al., 2011).

Chinese companies may not be different to others, but the Chinese market is

The extent to which Chinese companies differ from others in Cameroon, beyond their collective larger scale and rapid pace of growth, remains a subject for debate and differing interpretation. Chinese companies may benefit from credit arrangements or diplomatic support not available to others for example. Cerutti et al. (2011) analysed the practices of various concession-holding companies in Cameroon and how they relate to the markets for their timber. One case study looked at a European company certified by the Forest Stewardship Council (FSC) with a well-established market in northern Europe. It found that Chinese demand for secondary species could increase profits in some years, leading to more harvesting of those species, but in other years less demand meant that the species were not harvested. Conditions can change abruptly from one year to the next and harvesting remains selective of traditional high-value species. Meanwhile, a second European company and a Chinese company that both mostly export to Asia, and to China in particular, were less affected by the variable conditions of Chinese demand; if demand changed from one species to another, they could readily adapt since they normally harvest a greater variety of species.

Major changes to markets, and therefore to the impact on Cameroon's forest sector, are signalled by recent developments in mining and infrastructure projects – some of which also involve Chinese companies. For example, several large mining projects located in the east of the country are reducing the costs of transportation, making it more viable to harvest low-quality and secondary species. If mining companies build a long-promised railway network, a huge surge in logging might occur as timber could be transported from remote areas to the sea at a fraction of the current road price (see Section 3.4).

If the current volumes and value of exports from Cameroon to China are maintained or grow, and if the current number and size of Chinese companies active in the forest sector grow, we can expect mixed impacts on local economies and livelihoods, and a substantial increase in negative environmental impacts that will require great organisational and policy effort to combat. We turn to this in Section 2.6.

2.6 What effect on forest governance and on communities?

After years of effort to improve forest governance, problems are back with a vengeance

Government agencies and NGOs in Cameroon, also with significant external support under the FLEGT programme in particular, have pursued a wide range of initiatives over recent years to improve mechanisms and processes of forest governance. But whilst substantial space for dialogue has been developed and maintained, it appears that improvements initially made in these mechanisms and processes have proven fragile.

The Ministry of Forests website created to publish all the materials about FLEGT has not been significantly updated recently. Some fines have been levied for transgressions of regulations as revealed by independent monitoring (EU FLEGT Facility, 2017), but currently there is no independent monitor with these previously effective subpoena powers. Analyses by NGOs on issues of conversion timber (Bassalang, 2017) – which appears to be a big source of forest cover loss and illegality – and on the use of sales of standing volumes permits and other actions which evade forest sustainability measures (Global Witness, 2013; Greenpeace Netherlands, 2015) contributed to prosecutions the timber importing countries of the Netherlands and the UK, no effective punishments appear to have been handed down in Cameroon for such illegal logging and trade (Greenpeace Africa, 2016).

An audit of FLEGT forestry projects between 2003 and 2013 across several countries including Cameroon by the EU's Court of Auditors concluded that the programme's gains were fragile and it had often failed to achieve effective partnerships with the key players in these countries (BBC, 2015).

A Chatham House analyst concluded that progress by government and private sector in controlling illegal logging in Cameroon has stalled since 2010. The analysis identifies corruption as a dominant feature of Cameroon's forest sector, along with very slow progress in reforming the forest legislative framework, initiated in 2008 and yet to be completed. While progress was evident in the private sector – particularly the increase in the total area of forest with legality verification or certification – illegal activities remain widespread throughout the forest sector as a whole (Hoare, 2015).

While it is estimated that half of total production is by informal artisanal producers, who mainly supply the domestic market, illegality is also apparent in supply chains for export. Timber originating from small permits and sales of standing volume is thought to be particularly problematic; the supply of timber via these permits is expected to increase,

owing to the growing pressure on forests from agribusiness, infrastructure and mining projects with associated 'conversion' of use and timber extraction (Hoare, 2015).

Forest communities have little negotiating power

Consultation with local communities is supposed to take place before logging concessions or other land allocations are granted by government on communal lands, but is rare in practice. a form of consultation with the potentially affected communities is supposed to take place. Genuine consultation in practice has been rare. For logging concessions, consultations are supposed to determine the limits of the area, but do not require discussion of the desirability of creating a concession in a specific location. Concerning land concessions, Cameroonian law provides for a key role to be played by the land consultative board – which is charged with the responsibility of identifying the most suitable areas to be allocated as concessions. It should, in principle, include chiefs of the affected communities – in practice this is rarely participatory, notification is not always given of the visit, little or no information is provided to participants, all relevant chiefs are not always invited (and not all represent their communities effectively), and in some cases no visit to the site is even undertaken (CED et al., 2017).

Logging companies do, however, also negotiate with neighbouring villages about specific monetary or in-kind contributions (*cahiers de charges*). In practice, communities usually have limited negotiating power in discussions over the contents – their lands having already been conceded by the state – and often lack the technical expertise to negotiate sufficiently clear, binding and beneficial clauses. This is often due to a lack of information. Communities often have to 'negotiate' for benefits that the company is already intending to or is obligated to provide (eg upgrading an access road that the company will need to improve for its own purposes), that are insufficiently defined (eg building a school without funding for maintenance, materials or teachers) or that the company is legally precluded from carrying out (eg work on public roads, which generally can only be carried out by state authorities) (CED et al., 2017). Nevertheless, these agreements on *cahiers de charges* are often generally perceived more positively by the local population than the ineffectively redistributed revenues from area taxes (Cerutti et al., 2011).

Local authorities and companies lack accountability

Local authorities' archival practices are weak, and authorities often have vested interests in ensuring that information is not widely available. This has perverse effects both on communities' enjoyment of those rights they are given under national law, and also their ability to monitor and complain about any infringements of laws governing other actors (government or companies). The voluntary partnership agreement between Cameroon and the EU agreed that only legally produced timber can be imported into Europe, providing some support for better community access to forestry related information – possibly

including social contracts. However, it does not give communities any direct rights to access information, and as yet this instrument has had limited effects in providing access for communities or NGOs supporting them (CED et al., 2017). With Cameroon's timber trade increasingly oriented towards China and other non-EU markets, there is an urgent need to focus on how logging can be carried out with more local benefits and accountability.

In the early years of Vicwood-Thanry's concession management, some serious charges were made about its social and environmental practices – along with those levied at other companies. Greenpeace, citing credible sources, described substantial illegal bush meat poaching in Vicwood-Thanry forest concessions, and the company's logging trucks being used to transport bush meat and elephant tusks out of the forest (Greenpeace, 2002).

Various sector analysts highlight problems with the system of standing volume sales; they require no management plan and effectively allow the permit to be sub-contracted. The permits are intended to allow logging on no more than 2,500 hectares of forest; however, they have been misused at times to cover the same scale as forest concessions, but without the responsibilities. Between 2000 and 2002, Vicwood-Thanry was fined US$1.3 million by the government for various violations of permits including cutting undersized trees and logging in unallocated concession areas (Greenpeace, 2002).

Indigenous communities are particularly hard hit

Indigenous peoples in Cameroon are particularly hard hit by the imbalances of power in the way the country's forests and lands are allocated and used. Community mapping programmes are making good progress in helping communities of indigenous peoples, notably the Baka, to map their forest habitats in the hope of giving them the power to negotiate with loggers and conservationists targeting their communities, in order to better protect the most critical parts of their claimed forest. However, "in reality strong Chinese and other global market demands for Cameroonian forest products means that indigenous communities will continue to remain powerless to stop their forests being destroyed by unscrupulous producers thereby further undermining their economic development" (Mbatu and Otiso, 2012).

Community forestry promises, but languishes

There is potential in Cameroon's community forestry system for the timber trade to be put on a sustainable footing. Community forestry has been a feature of the formal forest governance system for over 20 years. During that time, a number of community forests have been set up under the forestry law. Unfortunately, despite the high hopes held for it at the outset, community forestry is widely considered a failure in the country; it has not led to widespread forest management by communities living in forested areas (only 1.18% of the surface area of Cameroon is under a community forest regime), and those

areas which are included in the regime have on the whole not produced the desired results in terms of better livelihoods and less deforestation (CED et al., 2017).

There are a variety of reasons for the limited success of the community forestry approach in Cameroon. Some of these relate to features of its legislative design, such as the limited size which communities can be granted (a maximum of 5,000ha), limited tenure rights associated with community forests, the complexity of the management requirements, the high costs and the limited provision for any government support to communities to participate in community forestry. Weak investment in roads, electricity and education, and an ineffective judiciary that hinders the development of legitimate business enterprises, also hamper progress (CED et al., 2017).

2.7 Conclusions: Cameroon-China forest sector investment

Cameroon has substantial forests and a full spectrum of ways in which they are used – from low-level offtake and careful management to excessive, destructive exploitation and conversion to other land uses. The government attempts to control forest usage through a variety of plans, permits and concessions. Some of these are poorly framed and applied, and many are flouted. Illegal logging and conversion are major problems.

Timber has been an important economic sector for Cameroon, although its growth has fluctuated over the last 30 years. Cameroon is currently the fourth largest exporter of tropical timber by volume internationally. Recently, efforts have been made to put the country's timber trade on a more sustainable footing, particularly with more transparency in revenue flows through local governance,and a system to guarantee that all timber produced in Cameroon, for the domestic market, the European market or any other foreign destination is legally sourced. But implementation problems on both fronts remain.

Ownership of the rights to exploit forest areas, and of the companies involved in the timber trade, has also evolved over the years. Chinese involvement in forestry and the timber trade in Cameroon has risen recently – and China is currently Cameroon's biggest timber buyer. Some of the companies involved have predominantly Chinese capital, while others do not, but focus on selling timber to China. China prefers to import raw logs, but prior processing in Cameroon has increased a little, as has the mix of species involved in the trade. However, the trade data is plagued with discrepancies.

Chinese companies themselves have expressed concerns about the costs of transport and the unstable policy environment in considering their future in Cameroon. In this, Chinese companies are little different from others, but the large scale of their collective involvement in the sector marks them out. The government of Cameroon meanwhile, like others, wants to see more economic value derived from its forests – and pushes

some provisions on local processing. But, after years of considerable forest governance progress, problems of weak implementation have recently prevailed again.

The net effect, in the forest, is not very encouraging. Communities by and large get little return from forest exploitation, while the forest itself continues to be badly degraded in many areas and sometimes illegally converted. Indigenous communities are particularly hard hit. Community forestry – a programme with formal momentum over some twenty years now – has promised much and delivered rather little. Meanwhile, as agribusiness and infrastructure developments increase, secondary timber use and conversion timber volumes are rising and remain largely unregulated.

Policymakers need to get on top of the situation, and those involved in the timber trade with China need fresh incentives for sustainability.

3 Cameroon-China non-forest sector investment

3.1 Overview of Chinese investment in Cameroon

China and Cameroon established formal diplomatic relations in 1971. Since then, Chinese state-backed aid projects in Cameroon have included constructing the Cameroon parliament building, a conference centre and sports stadium in Yaoundé and a women and children's hospital. A feature of the early 1980s was the Lagdo hydroelectric dam near Garoua, as well as assistance in building public hospitals, mainly in Mbalmayo and Yagoua. Since then Chinese aid to the state has enabled well-drilling, road building and other medical and education assistance initiatives. The Cameroon government estimated that there was US$2.86 billion of new investment from China in 2015, and another US$2.43 billion in 2016 (Assembe-Mvondo, 2019).

China's Exim Bank is the public financial institution currently financing most of the major infrastructure projects underway in Cameroon: the Memve'le hydroelectric dam; the deep-water port at Kribi; the Yaoundé-Douala motorway; the deployment of fibre optics by the country's telecoms operator, Cameroon Telecommunications; the 'e-post' project to connect all the country's post offices; and projects to supply drinking water in four major cities. Exim Bank is also expected to help finance the construction of further sports facilities in Cameroon, as well as the second container terminal at the deep-water port at Kribi, which will apparently double the existing 350 metres of quays in the first terminal

(Assembe-Mvondo, 2019). Chinese investment banks could also finance all or part of the construction work for the future Song Dong dam in the Central Region of Cameroon.

3.2 Accessing and allocating land for investments

There are potentially 6.2 million hectares of arable land in Cameroon, all of it occupied, but of which only 1.3 million ha (just under 20%) are cultivated (Land Portal, 2018). Demand for arable land has recently manifested itself in two main ways. First, there has been rising demand for land for agricultural investments, from both large-scale agro-industries and medium-sized enterprises (mainly controlled by local or national elites), seeking anything from tens of ha to several hundred. Second, there are pressures on agricultural land from non-agricultural activities. A wide range of large-scale infrastructure projects (such as dams, pipelines, railways and deep-water ports) and mining concessions have been initiated in the last few years. The rapid development of this phenomenon is exacerbating land shortages in rural areas, at a time when demographic growth is set to significantly increase the demand for arable land in rural communities (Nguiffo and Sonkoue Watio, 2015).

Cameroon's land and natural resources laws tend to regard ownership as essentially individual and give owners absolute rights over them. However, Cameroonian communities have traditionally claimed rights to all the country's land, which they regard as part of their customary holdings. Under customary law in Cameroon, the notion of ownership is more complex and nuanced: along with the individual ownership seen in statutory law, certain spaces and resources are collectively owned by the community. Its members are allocated individual rights to these shared assets, but this does not mean that they own them. Most rural activities in Cameroon involve using local spaces and resources to provide food, shelter and income from agriculture, including rearing livestock, fishing, gathering wood and NTFPs, producing charcoal and hunting. And land is not just a productive resource; it also has a cultural value and shapes the identity of the people whose livelihoods depend on it (Nguiffo and Sonkoue Watio, 2015).

As demand for land from the mining and agro-industrial sectors intensifies and the government pursues its policy of encouraging foreign investment in the country, there is a risk that local communities will find it increasingly difficult to maintain their customary practices. There is also concern about the extent to which legal frameworks provide effective avenues for ensuring accountability in the governance of land and investment (Kenfack et al., 2016).

3.3 Agro-industries: a few large-scale Chinese players

Subsistence agriculture dominates, but agro-industries are increasing

Agriculture is the mainstay of Cameroon's economy, contributing 43% of GDP, and providing employment to 70% of the working population. Land acquisitions for agro-industry have recently increased in number and scale. One study covering the period 2005–13 listed 16 firms (mostly international) controlling or requesting control over a total of at least 1.27 million hectares for a variety of agricultural purposes. Of these, two firms were under Chinese ownership (Nguiffo and Sonkoue Watio, 2015). Other data record a small number of additional Chinese firms active in Cameroon's agriculture sector (Table 2).

Table 2. Chinese agricultural operations in Cameroon, 2018

Company	Area of agricultural operation	Type of farming enterprise
Hevecam – Halcyon Agri Co. Ltd	52,607 ha	Rubber
Sudcam – Halcyon Agri Co. Ltd	58,931 ha	Rubber
Beihail Fishery Co.		Fishery
Cameroon Xiongshi Co. Ltd.	>15 ha	Eggs, chickens, feed processing
Dima Gabriel (Jin Li Fishery)	-	Fishery
Sino-Cameroon IKO Agriculture Development Co. Ltd.	100 ha	Rice planting, cassava processing, ostrich farming
Societe Agromac Import-Export	-	Agricultural machinery
Da Long Fishery	-	Fishery

Sources: Halcyon Agri (2019), Nguiffo and Sonkoue Watio (2015) and Wilkes (2016).

Rice and cassava: yet to be a major Sino-Cameroon success

Rice production has been a recent focus for Chinese companies. The Sino-Cameroon IKO Agriculture Development Company Limited was formed with the participation of a Chinese company from Shanxi Province. It announced its plans in 2006 for rice and cassava production on an area of several thousand hectares near the town of Nanga Eboko and another site, with finance from China's Exim Bank. According to the most recent report, the area under cultivation by the company stands at 120 ha (Putzel et al., 2011). The Chinese company, a subsidiary of a state farm in China, has also won a contract to establish a Chinese aid-funded agricultural demonstration centre, with a planned total area of 10,000 ha (Wilkes, 2016). Putzel et al. (2011) find that this transfer of land to the company represents an improper transfer of state land resources. The conflicting reports on the public or private status of the company, its source of funds, its purpose, and the land area under its control point to the lack of transparency in agribusiness deals in the country (Nguiffo and Sonkoue Watio, 2015). As of early 2018, it appears that test plantings of rice and cassava at the two sites have not flourished, and control of the land is yet to be granted to Sino-Cameroon IKO Agriculture Development Company Limited (Assembe-Mvondo, 2019).

Rubber bounces back under Chinese ownership

Rubber production is the objective of recent Chinese company acquisitions of about 112,000 ha of land, at two sites in the departments of Ocean and Dja Lobo. These areas comprise the holdings of two companies Hévéa Cameroun SA (*société anonyme* – roughly equivalent to a public limited company), known as 'Hevecam' and Sud Cameroon Hévéa SA ('Sudcam'). Hevecam is a former state-owned company that began planting rubber in the 1970s and was later privatized. Sudcam is a newer private company which has been involved in forest clearing and rubber planting only in the last 10 years (Assembe-Mvondo et al., 2015a). Halcyon Agri Corporation Limited ('Halcyon Agri') acquired both Hevecam and Sudcam in 2016 through a merger with their previous Chinese owners Sinochem International Corporation Ltd. ('Sinochem') and controls them through a string of Singaporean and Cameroonian registered subsidiaries. Sinochem has the majority shareholding of Halcyon Agri and the China-Africa Development Fund Co. Ltd is also a major shareholder (Greenpeace Africa, 2018a).

Halcyon Agri's technical operations are reportedly focused on three objectives: growing rubber tree (*Hevea brasiliensis*) for latex production; constructing a processing plant; and developing infrastructure. Halcyon Agri claims that between its two Cameroonian 'operations' it has 'the single largest rubber plantation in the world', and to date claims to have a planted area of 29,000 hectare out of a total plantable area of 73,000 ha (Halcyon Agri, 2019). The Sudcam plantations take the place of biodiversity-rich forest areas adjacent to villages such as Nlobesse and Djikom, and to a World Heritage

conservation site – the Dja Wildlife Reserve. As of late 2018 it is estimated that over 10,050 ha of such forest have been converted since 2011 (Greenpeace Africa, 2018a) in the Sudcam concessions. Meanwhile, in the Hevecam concessions, some 18,500 ha of new rubber planting is apparently planned, also converted from biodiversity-rich forest, in an area not far from Bissiang village and the port town of Kribi (Assembe-Mvondo, 2019).

Some jobs and local development initiatives have improved

In a study of changes over several years following Sinochem took over Hevecam, working conditions and facilities for workers have improved – although workers are reported to openly complain about low salaries, poor housing and sudden contract terminations. A hospital with 150 beds and 17 small medical centres have been built, as have two secondary schools, with 80 teachers apparently part-paid by Sinochem (Assembe-Mvondo, 2019).

In a study of changes over several years following Sinochem's takeover of Hevecam in 2008, it was found that working conditions and facilities for workers had improved. More recently though, it is reported that workers openly complain about low salaries, poor housing and sudden contract terminations (Assembe-Mvondo, 2019). A hospital with 150 beds and some 17 small medical centres have reportedly been built, as have two secondary schools with 80 teachers apparently part-paid by the company, and Sudcam's plans currently include constructing and maintaining roads and bridges within the sites, as well as offices, and equipment maintenance workshops, housing for staff and some social infrastructure (dispensaries, schools, playgrounds and churches) (Assembe-Mvondo, 2019).

If fully realised, these investments would likely bring significantly more employment to the sector – the Ministry of Forests has reportedly estimated an eventual workforce at Sudcam of 30,000, while Sudcam itself has recently estimated 10,000 workers, which together with their families might number 40–50,000 people (Assembe-Mvondo, 2019; Halcyon Agri, 2018). In terms of increased production and export volumes Halcyon Agri states that in 2017 Hevecam produced 18,000 metric tonnes of rubber and the company expects to reach 100,000 metric tonnes of rubber per year from Sudcam and Hevecam combined (Halcyon Agri, 2019). But there are potential challenges linked to workers and families migrating in. These include increased pressure on resources such as farmland; NTFPs, which will also be increasingly scarce due to land conversion for rubber; and wildlife and fish resources. There is potential for conflict between current residents – in 2011 the local population in the Sudcam area was estimated at 9,500 people – and new arrivals, as well as the spread of disease and a number of other socially detrimental effects (Assembe-Mvondo et al., 2015b).

Environmental costs are rising

The rubber industry is an intensive user of phosphate, nitrogen and potassium fertilisers – with the associated dangers of chemical pollution and toxicity in water and soils. Mitigating these effects should in theory be addressed by the companies' social and environmental responsibility plans – but, while there is some evidence of planning, there is little on implementation (Assembe-Mvondo, 2019).

Meanwhile, the environmental problems caused by forest conversion have been reported with alarm. Data indicate that the Sudcam plantation is currently less than 1 kilometre from intact primary forest habitat, and concerns are growing about threats to endangered species within and outside the Dja Reserve. Some have also noted the significant carbon emissions related to clearing 10,000 ha or more of dense tropical forest, and Greenpeace have called this expansion "by far the most devastating new clearing of forest for industrial agriculture in the Congo Basin" (Greenpeace, 2018). Earthsight (2018) also reported that Sudcam has cleared roughly 330ha of forest outside its concession boundaries, and while it is possible that additional permissions may have been given, the parent company has not been able to verify this.

UNESCO has pointed to the risk that plantation farming could damage the Dja Faunal Reserve's unique standing as a world heritage site, particularly due to the substantial influx of workers (UNESCO, 2017). In late 2018, a study by the Norwegian sovereign wealth fund recommended that it pull out of investment in Halcyon Agri (at the close of 2017, Norway's Government Pension Fund Global owned the equivalent of 0.1% of Halcyon's shares, worth about US$ 0.65 million). It published its reasons for doing so, citing the unacceptable risk that the company is responsible for serious environmental damage (Council on Ethics, 2018).

Social conflict is festering

Forest conversion in the two areas constitutes destruction of the land, resources, settlements and culture of the Bagyeli and Baka indigenous peoples, some of whom are already deeply affected by other developments – notably the construction of the Kribi deep-water port. It is difficult to discern any social safeguards put in place by the companies in these forest conversions. For example, Batanga communities were removed from the village of Lolabe and transferred to another site some 6 kilometres away, with apparently no provision or consideration for the graves of ancestors and other sites of social and cultural significance (Assembe-Mvondo, 2019).

Social conflict is also emerging. In Bissiang, a village of 750 inhabitants, a member of parliament who is native to the locality prohibited access to a new electricity supply to all but four nearby households and put similar restrictions on accessing a new water point installed by Hevecam. This led to violent clashes followed by police arresting tens

of people and depriving many more of their civil liberties, including the village chief and his leaders. The dispute is currently pending in the Kribi Tribunal, apparently centred on accusations of an attempt to eliminate the parliamentarian through acts of witchcraft (Assembe-Mvondo, 2019).

Similar problems with a parliamentary representative are reported from the Sudcam area. The Sudcam area is also close to the Cameroonian President's village, and around 20% of Sudcam's shares are apparently owned by an influential member of the Cameroonian political elite (Assembe-Mvondo et al., 2015b). This is one reason why community members are thought to be afraid to directly confronting the company and local authorities with their concerns. The heads of several villages reported collusion between the company and their member of parliament (MP), living in Yaoundé, and decided during a general meeting to replace the MP with a representative of the village of Nlobesse in bringing their complaints to the company. Over time, hostility from members of the communities seems to be more openly expressed. In 2018 a group of traditional rulers from villages neighbouring Sudcam wrote a memorandum complaining, among other issues, about the absence of business opportunities for local people, and the lack of arable land for current and future use by the communities (Greenpeace Africa, 2018a).

A government departmental monitoring committee, focused on implementing environmental and social management plans, subsequently reported that Sudcam is a "good corporate citizen", but noted its: "(i) failure to take into account the fears and grievances of local residents; ii) the absence of an action plan prescribing measures to be implemented in connection with the Dja Reserve; iii) the inadequacy of alternatives to poaching in line with the activities of local populations; iv) the inadequacy of communication and relations between society and local residents; v) the non-existence of a specific action plan for minorities in accordance with the [company's management plan]; and, vi) the lack of involvement of local residents in the implementation of the [management plan]" (Assembe-Mvondo, 2019).

Along with pressures from some NGOs, the global market also appears to be having some impact on activities at Sudcam. The Norwegian sovereign wealth fund divestment was mentioned above, and some major buyers such as Michelin have adopted responsible buying policies that call for protection of High Conservation Value forests and management of carbon. In late 2018 Halcyon Agri announced a pause on forest clearing, the development of a 'Sustainable Natural Rubber Supply Chain Policy' and the creation of an independent 'Sustainability Council' to work on sustainability recommendations provided by WWF (Halcyon Agri, 2018). By April 2019, satellite imagery indicates no further forest clearing has occurred since 2018 and Halcyon Agri representatives have spoken of a new model of rubber development through smallholder production (Mongabay, 2019).

3.4 Mining: many small-scale Chinese players

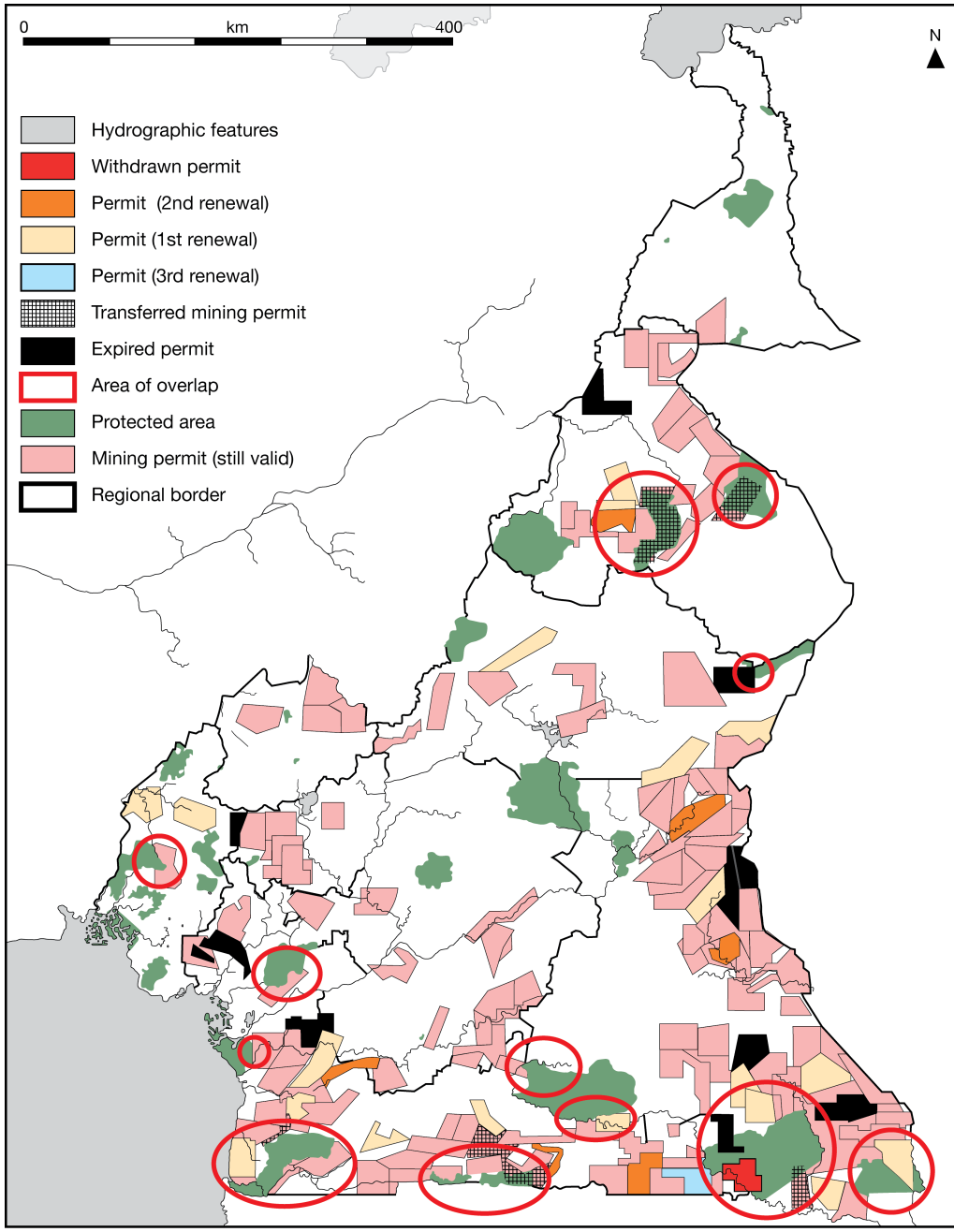
Industrial mining – more in the mind than on the ground so far

Cameroon is apparently rich in mineral resources – yet, in terms of industrial-scale mining, seems to have a growing portfolio of failed projects. There are reports of a few well-connected individuals making millions from excited investors, who buy inflated stocks in companies on the basis of mineral reserves, the size of which turn out to be vastly exaggerated. Meanwhile the minerals tend to remain in the ground.

The 2011–14 period saw a surge in industrial mining permits and exploration licenses. Analysis of data held by the Extractive Industries Transparency Initiative in 2014 revealed that of 129 mining titles valid to mid-2014, 25 exploration licenses were awarded to firms under Chinese ownership (although not all firms disclosed their ownership). These exploration permits covered a wide variety of materials: iron and metallic substances, rutile and related substances, gold and polymetallic substances, and uranium and related substances. Four companies controlled 20 mining titles, namely: First Choose Mineral Resources Cameroon SA (7 titles), Longsheng Cameroon SA (6), Investments International Corporation Coast (4) and Mining and Fametal Resources Cameroon (3). These exploration licenses covered an area of 13,942 square kilometres, or 17.2% of the total area of allocated prospecting permits, and were concentrated in the Cameroon southern forest, particularly in the East, South, Central and Southwest regions (Mala et al., 2015) (Figure 5).

Most of these exploration licenses were only valid until 2014 and, while the current picture is not fully clear, it appears that Chinese company involvement in industrial mining is limited. In 2016, of six industrial mining permits reportedly valid overall in Cameroon, only two, for limestone and diamond, were operational. One valid mining title was held by a Chinese company but this was not yet operational (Noiraud and Noiraud, 2016). This apparent slump in interest of Chinese companies in the industrial mining sector is perhaps partly explained by the relatively low mineral commodity prices on the international market. However, it can be expected that Cameroon's mining sector will continue to develop, and further Chinese involvement seems likely – media reports periodically indicate that stakes in Cameroonian companies have been purchased by Chinese firms, although as yet these appear to be inconclusive.

Figure 5. Mining exploration permits in Cameroon, 2011–2015



Source: redrawn from Adam Smith International (2016).

Artisanal miners collectively dominate the scene

Mineral exploitation is currently dominated by small-scale and artisanal mining. Semi-mechanised small-scale mining appeared prominently on the Cameroon landscape in 2007. According to the Mining Code of 2001, only those of Cameroonian nationality are entitled to an artisanal exploitation permit, but in 2007 the government asked a South Korean company to conduct an operation to salvage some 13 tonnes of gold that was otherwise likely to be washed away by overflowing water from the Lom Pangar dam (construction began in 2012 led by a Chinese corporation – see below). The authorities used this 'emergency situation' as justification, but it appears that the precedent was set for semi-mechanised artisanal gold mining elsewhere.

Indeed, little seems to stop the small-scale miners. Gold prices hit historic highs in 2011 following the 2008 financial crisis, catalysing an international gold rush (Goldprice, 2019). In December 2016 President Paul Biya promulgated a new mining code that recognized semi-mechanised small-scale mining and required Cameroonian nationals to be the majority shareholders in such companies. The decree implementing this new mining law is yet to be signed by the prime minister. Meanwhile, small-scale mining continues – with the involvement in particular of small Asian, often Chinese, companies. These companies often move into sites which have previously been the focus of artisanal permits, practising semi-mechanised artisanal mining using mechanical shovels and loaders, gravel washing machines and chemicals.

The status of authorisations in the small-scale and artisanal mining sector seems quite chaotic (Adam Smith International, 2016). Small-scale mines differ from traditional artisanal mines operated by local communities. Expatriates working at small-scale mines cooperate closely with artisanal miners, and mine sites are located alongside areas secured through artisanal permits. Regulatory and legislative loopholes in the mining sector, poor governance and the potential for large profits seem to be fuelling the expansion of this business model (Weng et al., 2014; Noiraud and Noiraud, 2016; Chekoua and Ngalim, 2017).

Chinese small-scale miners have joined the throng

By 2014 there was already a strong Chinese presence in artisanal mining in eastern Cameroon. A study of the expansion of small-scale mining in the valley of the Lom River near the town of Betare-Oya, 160 kilometres from the capital of the East Region, Bertoua, profiled a range of these small-scale mining companies, several of them Chinese (Weng et al., 2014). One of them employed around 60 Cameroonians while others had fewer than 10 workers. The parent company of the larger of these companies is a trading company based in Beijing. It is principally an export and import business with only limited involvement in mining. This company is engaged in both open pit mining and dredging. Another company was described as a typical Chinese family business, with a parent

company based in Gabon, which is also involved in timber, shipping, and the mineral trade between China and Africa. Another was a joint venture between a private Chinese company and a Chinese government-owned enterprise.

The study found that Cameroonian involvement in these small-scale companies was confined to unskilled or semi-skilled labour. The Asian workers who made up a larger share of the employees were poorly integrated into local communities. They lived in enclaves, bringing in supplies from outside and spending very little money on local produce. There was little social contact between expatriates and local people. This helps create a situation where misunderstandings can arise, and also limits the chances of mining activities making a significant contribution to local economies (Weng et al., 2014).

Small-scale mining operations could contribute to economic growth and local livelihood improvements. Since they are less mechanised and do not require the same levels of technically sophisticated workforces as large industrial operations, they might be expected to provide more employment for local people and contribute more to local economies. Whereas most foreign nationals working in Africa are located in the larger cities or engaged in large-scale investment projects, small-scale miners are driving a highly dispersed pattern of settlement in remote areas. Mining could generate secondary activities and provide markets for agricultural products. Infrastructure built to access mines could encourage agricultural development. Mining companies could build or improve local infrastructure and meet local development needs in sectors other than mining. If existing regulations were respected, mining taxes would be paid, environmental issues addressed, the use of mercury halted, mined-over sites restored and soil and water quality monitored. Some regulation of the movement, skills acquisition and duration of foreign workers' stay would be required (Weng et al., 2014). But governance weaknesses mean that investments in infrastructure are rudimentary and these remote populations are vulnerable to negative environmental and social impacts, while these expanding small-scale mines are making little or no improvement to their livelihoods.

Small-scale mining: low-level governance

Open mining holes abandoned by operators of semi-mechanised artisanal mines left a total of 50 people dead in the Ngoura, Betare Oya or Ngoe Ngoe communities in the East Region in 2017, according to the NGO Forêts et Developpement Rural (FODER). This civil society organisation reported that 250 mining sites opened between 2012 and 2014 had not been rehabilitated by their operators. It launched an online petition to get the Ministries of Mines and Environmental Protection to intervene (Chekoua and Ngalim, 2017). The main causes of death at mining sites were drowning and landslides. According to a researcher at FODER, "…holes abandoned by mining companies which do not close them become artificial lakes whose depth often goes beyond 10 metres. It is these lakes that swallow the people who live near the river, some of whom go in search

of gold. While companies are responsible for these accidents, the local residents are also liable by digging more unsecured tunnels which then submerged them in earth" (Chekoua and Ngalim, 2017).

Clashes between local communities and Chinese operators reported in the media appear to be increasing. A recent confrontation in the vicinity of Bétaré-Oya district resulted in the murder of two Chinese nationals involved in a dispute with local communities. In another incident, four bodies were recently discovered buried in a landslide at Ngongoe village in the Ngoura district. The collapse was allegedly caused by a Chinese small-scale miner who had an altercation with a worker of Central African nationality, knocked him out with a club and, to conceal the crime, deliberately caused the collapse (Assembe-Mvondo, 2019).

An example of weak governance in the mining sector is reported by Assembe-Mvondo (2019). In March 2014, the Divisional Mining Delegate for Lom and Djerem in the East Region went on a tour of mining sites under her jurisdiction. She came across five Chinese mining companies – Gipo Mining, Ging Ma SA, d'Or de lion, Danshang Ming and Fuhaï Ming – which, it transpired, had no legal authority to carry out their activities. Rather than suspending their operations, the companies were instructed to comply with general regulations for the sector.

3.5 Infrastructure: China dominates large-scale investments

Since the 1980s, much of Cameroon's infrastructure has been built by Chinese companies

One of the most prominent Chinese investments in Cameroon was Sinohydro Corporation's contract to construct the Lagdo Dam in northern Cameroon, completed in 1982, which is currently managed by a North American company. This dam provides power and irrigation for rice cultivation. Two reports, in 2002 and 2012, stated that water discharge from the dam caused flooding in Nigeria with human casualties. This prompted Cameroon to pledge in 2013 that it would no longer carry out flood discharges (Ngounou Ngatcha et al., 2002; Sighomnou et al., 2012).

Infrastructure projects with Chinese involvement have since proliferated in Cameroon; one study in 2014 identified 32 of them (Tsounkeu and Halleson, 2014). Of those significantly affecting forest land, Mala et al. (2015) listed 13 infrastructure projects being implemented by mostly state-owned Chinese enterprises. In many cases, these companies are contractors, not investors, and the source of funds includes Chinese funds

as well as finance from the World Bank and other international sources. Chinese firms are perceived as competitive in bidding for engineering projects.

One of China's biggest projects anywhere in the world

The Kribi deep-water port project is one of the biggest Chinese investment projects anywhere in the world. What is now known as Phase 1 of the project was funded with more than CFA200 billion (Central African francs; US$363 million), in a preferential loan from China's Exim Bank, and constructed by China Harbour Engineering Company (CHEC). According to one report, the port site at Kribi and the adjacent industrial zone sits on an estimated 30,000ha of forest land (Mala et al., 2015). Other studies confirm the effect of increasing road access leading to conversion of forest to agricultural land in Cameroon (Karsenty, 2010; Richards, 2013).

Phase 1 of the Kribi port complex is now completed and Phase 2 will apparently begin soon, substantially increasing the port's capacity. When it finally opens for business, it will be the largest deep-water port in central Africa. Some 85 % of the US$1.3 billion budget for Phase 2 of the harbour project is financed by Exim Bank, with the rest falling to the government of Cameroon. The Cameroon government expects the new port to stimulate the economy and provide relief for the harbour in Douala, as well as space to dock larger ships. The Chinese government, meanwhile, has made its interests clear in nearby iron reserves, and their connection to Kribi through new road and rail infrastructure (CNN, 2019).

To build the port, the village of Lolabe had to be destroyed and the villagers resettled in another site. Unfortunately, the grey areas of Cameroon's land law were no help to its 300 inhabitants. While many African countries have revised typically quasi-colonial land tenure laws in recent years, to recognize and strengthen community and individual land tenure in rural areas, Cameroon is yet to do so. When the Yasa peoples founded Lolabe in the early 20th century, they did so without property deeds or administrative permission. Very few of the villagers possessed papers proving they owned property. They were given a small amount of money in damages and were then forced to leave their homes immediately for a CHEC-constructed housing development. "Villagers were very optimistic when they heard about the harbour project. We hoped it would bring jobs and improve our lives," said Theodore Ivaha, Lolabe's vice village chief. "But for the last couple of years we have just gotten more angry because we are not benefiting at all" (Deutsche Welle, 2018).

Although construction has created jobs at Kribi, few have gone to local people – instead they have gone to better qualified workers from other parts of Cameroon. Cameroonian labourers on the building site have complained about working conditions, while Chinese supervisors have reportedly derided the labourers' poor work ethic. Chinese site manager

Qiangquang Li likened the endeavour to find local reliable labourers to "looking for gold in the desert" (Deutsche Welle, 2018).

Chinese and Cameroonian workers at the site are divided by more than culture. The roughly 300 Chinese workers in Kribi live in a closed camp at the harbour with living quarters, offices, a cafeteria and a Chinese cook. They rarely leave, and there is little if any contact with local people. However, some initial steps have been taken by local people and CHEC recently to create a communication platform (see Section 4.5).

Roads, dams, power plants, water supplies

Other Chinese-linked projects under construction include the Lolabe-Kribi and Edea motorways, Phase 1 of the Yaoundé-Douala motorway, and the Memve'ele, Mekin, and Lom Pangar hydroelectricity projects (Table 3). There are reports of agreements being signed between China and Cameroon for further projects, including another hydroelectric dam at Bini Warak in Adamaoua, and a drinking water supply project for Yaoundé City sourced from the Sanaga River (Assembe-Mvondo, 2019). By one estimate, in the ten years up to 2017, China granted nearly CFA3,282 billion (around US$6 billion) in loans (concessional, preferential and commercial) and grants to Cameroon, making it the largest provider of infrastructure finance in Cameroon (Assembe-Mvondo, 2019).

A grand scheme – and some contentious issues – on the Sanaga River

In 2011, Sinohydro was reported to have won the bid to construct the Lom Pangar Dam. However, the China International Water Electric Corporation (CWE) is constructing the dam and power plant. The purpose of the dam – the country's largest – is to produce electricity and to regulate water flows along the Sanaga River. The dam site is some 4 kilometres downstream of the Lom River's confluence with the Pangar River and about 13km upstream of where the Lom joins the Sanaga River. It is potentially part of a larger dam cascade on the Sanaga. A 105-kilometre high-voltage line, a bridge on the Tourake River, access roads to neighbouring towns and houses for workers are also part of the project (Assembe-Mvondo, 2019).

The African Development Bank issued a US$71.1 million loan for the project in 2011 and the World Bank also approved a US$132 million loan in 2012. The President of Cameroon laid the foundation stone for the dam on 3 August 2012, and the European Investment Bank approved a US$39 million loan in the same year. The French Development Agency is also reported to be an investor.

Table 3. Major infrastructure projects involving Chinese companies with impacts on forests in Cameroon

Company	Project	Status in 2018	Region
1. China First Highway Engineering	Phase 1 of the Yaoundé-Douala motorway	In progress	Littoral, Centre
2. Sinohydro Corporation, China Road and Bridge Corporation, China Communication Construction Company (CCCC)	Phase1 of the Yaoundé-Nsimalen airport motorway	In progress	Centre
3. China Harbour Engineering Company	Phase 2 of the Kribi port complex	Start of works planned in 2018–2019	South
4. Sinohydro Corporation	Memve'ele hydroelectric dam	Details being finalised	South
5. CCCC-Jianhsu Provincial Transportation Engineering Group	Kumba-Mamfe asphalt road	In progress	Southwest
6. China Harbour Engineering Company	Lolabe-Kribi-Bipaga motorway	In progress	South
7. China Machinery Engineering Corporation	Water supply to the city of Yaoundé from the Sanaga River	Works beginning	Centre
8. China International Water Electric Corporation (CWE)	Menchum hydroelectric dam	Start of works imminent	Northwest
9. Sinohydro Corporation, China Road and Bridge Corporation, CCCC	Bini Warak hydroelectric dam	On-site installation in progress	Adamawa
10. China National Electric Engineering Corporation	Mekin hydroelectric dam on the Dja River	In progress	South
11. CWE and China CAMC Engineering (CCAMCE)	Lom Pangar hydroelectric dam	Dam built by CWE, adjoining plant by CCAMCE under construction	East
12.Sinohydro Corporation	Mintom-Lele road	In progress	South and East
13. Xinjiang Communication Construction	Ntam-Mbalam road	In progress	East

Source: MINEPAT, Assembe-Mvondo (2019) and this study.

What impacts could the dam have socially and environmentally? International Rivers, an international NGO, claimed that the Lom Pangar Dam will flood part of the Deng Deng Forest Reserve and push local residents to hunt in nearby protected areas (EDC, 2014). Tension has also periodically risen at Lom Pangar between Cameroonian workers and CWE officials. Strikes have been common, sometimes resulting in CWE making commitments to improve working conditions. In November 2014, for example, the 1,500 workers at the construction site organised a strike to protest at CWE failing to honour previous commitments, such as paying promised premiums and registering workers with the National Social Security Fund (Assembe-Mvondo, 2019).

Dams, forests and people: a flood of issues

Flooding at villages has been observed recently upstream of the Mekin hydroelectric dam construction on the Dja River, including in the dry season. Construction began without a preliminary environmental and social impact assessment; this was only undertaken months later, according to Assembe-Mvondo (2019). Moreover, the mitigation measures prescribed in the resulting Environmental and Social Management Plan have only been partially applied. Project works are currently suspended while two bridges are built upstream at the villages of Ngalla-Bissombo and Assok-Ngombo (Assembe-Mvondo, 2019). UNESCO's World Heritage Committee recently reported that it: "expresses its deep concern about damage to forests, but also to the fields and plantations of local communities, caused by the flooding caused by the partial impoundment of the Mékin dam and the extremely fragile situation of the property due to the threats it faces" (UNESCO, 2017).

Work is still underway on the 200-megawatt Memve'ele dam and hydropower station, constructed by Sinohydro with finance from the Export-Import Bank of China, which was due to be delivered in June 2017. The electricity it generates is due to be connected in Yaoundé to the Southern Interconnection Network, helping to reduce Cameroon's current energy deficit. But the project has not been without its controversies. In 2014, during an on-site visit the Minister of Forests and Wildlife found that Sinohydro was storing a significant amount of recently cut timber. The timber had apparently been felled on the project site without the required authorisation of the forest ministry. The minister reminded Sinohydro of the legal provisions, promised to organise further on-site 'rescue felling', and organised to sell the illegally felled timber at auction (Assembe-Mvondo, 2019).

More recently, some reports have cast doubt on the quality of the work on the structures themselves. One source alleged that the dam is insufficiently robust to support the power of all four turbines operating at once. The source suggested that there were major design faults in the project, and that the hydrostatic pressure exerted by the water, and the vibrations emitted by the four turbines, could cause a rupture – putting human populations in danger. The source further alleged that investigations revealed a history of questionable

payments made by the Chinese company to the Minister of Water and Energy and a Gabonese accomplice, who has been serving as a patron of the company for years (Assembe-Mvondo, 2019).

3.6 Conclusions: Cameroon-China non-forest sector investment

Chinese involvement in agro-industries, mining and infrastructure projects in Cameroon is increasing. The Cameroon government estimates this to be worth about US$2.5 billion of new investment every year – much of it backed by China's Exim Bank. As with investments in the forest sector, China has the same social and environmental responsibility challenges as any other country – and is perhaps prone to the same temptations to circumvent the intricacies of a flawed governance system. But as the country's number one investor, these effects are amplified, calling for closer scrutiny.

Intensifying demand for land for these investments intensifies and the government policy of encouraging foreign investment in the country have led to major concerns. These include the exacerbation of land shortages in rural areas; the risk to livelihoods, cultural value and identity provided by land; and the weakness of legal frameworks for ensuring accountability in governing land and investments.

Subsistence agriculture still dominates Cameroon's arable land, but agro-industries are growing in number and Chinese players are on the scene. While a substantial rice and cassava growing project is yet to prove a Sino-Cameroon collaboration success, two major rubber projects – one with established plantations, the other involving forest conversion to new plantations – have been taken over by the same parent Chinese company and have reportedly improved some local jobs and development initiatives. However, some problems from the past have been transferred with ownership and remain unresolved, including uncompensated land acquisition, dispossession by the government, failure to fulfil promises of employee share-ownership and poor employment conditions. Furthermore, in the new rubber plantation project there is a growing web of interconnected problems: high-level but opaque political involvement; questionable land titles; large scale displacement of local communities and indigenous people; high-value forest conversion and conversion timber trading; and rising environmental costs. Very recently, the company appears to be beginning to improve its standards – although this seems to be more in response to its international buyers' and investors' policies than to pressures within Cameroon or China.

While Chinese involvement in large-scale mining is yet to take off, a large number of small Chinese companies appear to be involved in small-scale mining. Indeed, Chinese businesses seem to have pioneered the industry in the early parts of this decade. Chinese

small-scale miners have joined the proliferating activity in this sector, which remains beyond government control.

China dominates the list of foreign investors in Cameroon's large-scale investment sectors. One of China's biggest port investment projects worldwide is underway in Kribi, as are a variety of roads, dams, power plants and water supply projects – including the Memve'le hydroelectric dam, the Yaoundé-Douala motorway and drinking water supply projects in four major cities. These projects generate a range of issues for forests and people, including forest conversion and social conflict. While good governance initiatives and better multi-stakeholder dialogue hold some promise of better corporate responsibility, the infrastructure sectors see little interaction between Chinese and Cameroonian workers – and between companies and citizens – compared to other sectors. So, with BRI advancing, there are huge challenges to making the right investments, and making them work well for Cameroon.

4

Assessing an initiative that engaged with Chinese investments in Cameroon's forest

4.1 Actors and Platform

Developing and wielding the analysis

This section explores the effectiveness of an effort, described in section 1.2, to engage directly with some of the issues and impacts described in sections 2 and 3, and to seek improvements in policy and practice in Chinese investments in Cameroonian forest land use. Following previous research by CIFOR in Cameroon, research and policy advocacy work on forest and land-use investment governance issues by CED with a range of other partners, dialogue convening work by NESDA, and work with particular forest concession-holding companies by WWF, some scoping meetings between these organisations and IIED were held. IIED's NGO partner from China, the Global Environmental Institute (GEI), were also involved in interactions with the Ministry of Forests and other Cameroon government agencies. Research findings, priorities, interests and capabilities were weighed up through further dialogue and a project team and plan, to be steered by CED and IIED, with NESDA and WWF, were put together.

The project team conducted a diagnostic study of the scale and dynamics of Chinese investment in land use in Cameroon and, through this, identified individuals and organisations with whom to share and develop information, including those in government and civil society organisations, the private sector and research institutions. IIED also provided connections to partners and relevant bodies of work internationally and Chinese language expertise and experience in working with Chinese companies. The initial diagnostic study was used to stimulate interaction, dialogue and evidence co-generation with others through the initiative, and is now further developed as this report.

Bridge-building dialogue and the China-Africa Forest Governance Platform

Working primarily with companies linked to China, the initiative focused its dialogue efforts in three main areas between 2014 and 2018: i) supporting the formation of a new Chinese timber company association dedicated to improving timber trade practices of its members, and supporting engagement by the association with government and local civil society; ii) carrying out capacity building work with those in, and engaging with, three concession companies in particular that export to China in improving their sustainability practices; and, iii) obtaining the commitment of two large Chinese infrastructure contractors companies to improve their community impacts. The relative effectiveness of this work is reviewed below.

A range of workshops were held in Cameroon through this period, each aiming to advance shared understanding and/or generate levels of commitment to make improvements. Some of these were cross-institutional – engaging with government, civil society and the private sector – others were capacity-oriented and held with NGOs, the media, local government agencies, and Chinese companies, separately and in combination.

Three international learning events of the China-Africa Forest Governance Platform, which had been established by IIED, GEI and Chinese government partners in 2013, were also held in this period, involving not only a wide range of participants from China and Cameroon, but also from DRC, Mozambique, Uganda and several other African countries. These international learning events were held in Yaoundé, Cameroon, in 2015, Beijing, China in 2016 and Pemba, Mozambique, in 2017. Each of these Platform events enabled draft research to be aired, debated and verified, and enabled relationships amongst African and Chinese government, private sector and civil society players to develop. Plans for subsequent work were also made and modified at each event, and participant evaluations of the events suggested that each event represented a step up from the last in terms of the quality of information and dialogue, the level of shared understanding and the targeting of subsequent research, capacity and policy influence work (Mayers et al., 2017).

4.2 Engaging with Chinese companies in the timber sector

Working in Chinese among the traders

A Chinese forestry and timber trade expert with experience of the Congo Basin, working in Mandarin as part of the IIED project team, developed forestry and timber trade contacts in Cameroon through the WeChat social media platform. Over time, he provided a variety of newsletters and briefings on this developing network with information about Cameroonian policy, legislation and opportunities to improve the timber trade. He produced 16 newsletters in all, which continue to be viewed (over 800 reads by early 2019). By encouraging readers to respond and enter discussion, the newsletters generated further information that was useful to both the timber trade contacts and the project team.

Previous attempts by Cameroonian NGOs and government agencies to interact with Chinese timber traders in Cameroon had met with limited success, so this use of an appropriate form of social media proved to be a breakthrough. Over time, through interactions with those active in DRC as well, regular newsletters sent by the project team and follow-up interaction engaged 200–300 Chinese-speaking users, split roughly equally between the two countries. Face-to-face and small group meetings followed. This creative work developed a level of trust among a previously marginalised stakeholder group – trust which was later recognised by participants in the China-Africa Forest Governance Platform – and enabled the project to gradually ramp up discussion on legality and sustainability issues (Mayers, 2018).

Encouraging more formal association

The project carried out capacity-building work with a wide range of companies, such as training for some 23 Chinese companies on Convention on International Trade in Endangered Species (CITES) restrictions on Cameroon timber species conducted by Chinese CITES and customs departments. Then in 2016, project partner organisations helped catalyse the formation in Douala of the African Branch of the National Forest Products Association of China. By this time, the association had some 23 members from Cameroon, and others interested in joining from neighbouring Congo Basin countries. In its articles of association, this new body states its commitment to operating fully within the framework of Cameroonian law.

This initial collective commitment to legality is important in the context of the forest sector which suffers from a range of illegal practices, as discussed in section 2. The project partners were then able to assist the new association to develop its work plan and held

some sessions with its members to provide information and advice on the connections between legality, local benefit and sustainability.

The project ran two further training events for Chinese companies based in China, some of them in the China Forest Industry Association, including several major timber buyers, and those based in Cameroon, including members of the new association. These events focused on demonstrating legal compliance, looking at the US Lacey Act, EU Timber Regulation, the Australian Illegal Logging Prohibition Act and the emerging legal verification system in China. They also covered traceability and legality options for the new association, and links to green procurement initiatives in China. While trust between the players in this system is clearly critical – hard to win and easy to lose – and will not be sustained through a few irregular workshops alone, it was recognised in workshop participant evaluations that some basis had been set for further initiatives to improve responsibility in the timber trade.

4.3 Engaging with large forestry companies

Efforts to install improvements in large forestry companies

Chinese small-scale timber traders – and logging in relatively small forest areas linked to that trade – have a substantial collective impact, due to the large numbers of those involved. The high proportion of timber from some of the large forest concessions that is exported to China also results in significant impacts on forests and people. Primarily under its Global Forest Trade Network, WWF has worked for 15 years or more with some of the large concession-holding companies in the Congo Basin to encourage them to take steps towards greater legality and sustainability – with FSC certification its major objective (WWF, 2005). Others have been increasingly critical of such approaches, suggesting that the WWF support enables the companies to claim many improvements whilst making few (CED, 2013, Global Witness, 2013).

The project sought to explore the prospects for improvements amongst such larger companies supplying the timber trade to China, through engagement with WWF in Cameroon. WWF has worked with three large concession-holding companies, SIM, ALPICAM and WIJMA, which have exported some of their timber to China, with the stated objectives of helping these companies get fully prepared for independent third party legality audits and legality certification, and to strengthen their commitment to move to sustainability certification. SIM is an Italian-owned company managing more than 410,000 hectares of forest. Within the collaboration agreement (a co-signed MoU) between SIM and partner WWF, a baseline assessment of legality compliance was made in 2016. WWF then advised SIM on developing and implementing its action plan on legality compliance. A performance assessment against the 2016 baseline was made in 2017 and further plans for improvement were then made – including on

high conservation value forest areas and reduced impact logging. Assessment of the compliance of SIM with its Environmental and Social Management Plan (ESMP) was also conducted. WWF found that performance overall was 'average' on environmental management and 'weak' on social management WWF then went on to offer SIM a tool to better monitor illegal activities, to train relevant staff in its implementation and to support training conducted by a certification body (the Société Générale de Surveillance, or SGS) on the certification process and standards. SGS conducted more training in 2018 on reduced impact logging, and WWF trained 12 key staff in the company on identifying and managing important sites for wildlife. Time and further actions will tell if WWF's work to put SIM on a path to responsible forest management and legality certification are well founded.

Collaboration between WWF and ALPICAM, which has concession areas totalling about 450,000ha, was also based on a MoU developed with WWF. Support to ALPICAM was focused on preparing for FSC certification, following an FSC Controlled Wood audit report. WWF worked with 284 employees and 11 villages in total, particularly to develop a shared understanding of different categories of wildlife and their protection status, the impacts of illegal wildlife activities and the consequences of these activities in terms of sanctions.

WWF collaborated with WIJMA to provide technical and financial support for the training of 26 Village Forest Management Committees (VFMCs) around one of its four Forest Management Units (managed by CAFECO – a company member of the WIJMA group) as well for a consultative platform made up of representatives from VFMCs. Several rounds of discussions were also held between WWF and staff of the companies in the Chinese-owned Vicwood-Thanry group, notably with STBK (with some 250,000 ha of concession) and with SEFECCAM-SIENCAM (with 280,000 ha). Some commitments to work towards legality and sustainability certification were apparently drafted but it is understood that they are yet to be made public.

Criticism of such developments continues (CED, 2013, Global Witness, 2013). ALPICAM has been reported for illegal actions by the EU-supported independent forest monitor in Cameroon on several occasions (CeDLA, 2018), and its commitment to improvement thus called into question. WIJMA, which a few years ago had the first FSC certification in central Africa, has recently been accused of unethical practices in the context of conflict in south-west Cameroon (Greenpeace Africa, 2018b) and has subsequently exited from their concessions in Cameroon, citing financial and operational difficulties. It has reportedly sold two of these FMUs to Vicwood-Thanry, and one each to Chinese and Cameroonian companies –– all companies without certification commitments – and the FSC has suspended the certificates (Arounsavath, 2019).

Emphasising the Responsible Timber Exchange and FLEGT

Work by WWF has also focused on promoting the Responsible Timber Exchange platform as a tool to screen out the illegal timber trade and to stimulate lesson sharing between certified and non-certified companies. WWF collaborated with the international consulting company Proforest, which has developed and promoted the Exchange. Following a workshop with forest companies in Cameroon held by WWF and Proforest in 2017, WWF and linked organisations have carried out effective advocacy work on legal timber with forest companies.

The project team also collaborated with an initiative steered by the international NGO TRAFFIC in Cameroon, focused on training relevant stakeholders on the legal issues in the voluntary partnership agreement (VPA) between Cameroon and the EC on Forest Law Enforcement, Governance and Trade. The TRAFFIC project also helped produce a Cameroon-specific version of the Chinese government's guidelines on overseas forestry investments, integrating VPA/FLEGT requirements. Collaboration with this project also led to the production of a Cameroon-specific manual on legality, and documents to promote it in French, English and Chinese. This in turn enabled the team to interact with Chinese companies, and others that export to China, based on the manual.

4.4 NGOs grappling with the timber industry

Project partners CED and NESDA were able to engage with many NGOs over the course of the initiative. The partners have succeeded in helping most of the NGOs improve their ability to communicate with, develop information about and dialogue with Chinese investment in Cameroon. Some NGOs are beginning to use tools which can help these investments to be accountable. They achieved this through focusing on training and dialogue with 18 NGOs and 10 media companies on forest resource management issues, the role of different investors in some of these issues, good environmental and social practices in the forest sector, and the way in which the Chinese government guidelines on Chinese overseas investments should be used.

The project partners also helped 20 local civil society organisations (CSOs) to improve their understanding of Chinese legal frameworks relevant to Chinese overseas investments in forestry, infrastructure, mining and agri-business. They held various forms of workshop, including one in which a range of Cameroon CSOs shared their experiences of Chinese investments in the country, in a vibrant exchange with a high-level Chinese government delegation. It included a senior deputy from the Chinese congress involved in designing the environmental and social policies for China's outward investment.

The project team had several key interactions with traditional chiefs which enabled them to convey the chiefs' views to some Chinese companies in the forest sector. For example, His Majesty Mvondo Bruno, Coordinator of ReCTrad (Réseau des Chefs Traditionnel d'Afrique pour la gestion durable de la biodiversité et des écosystèmes de forêts) highlighted some traditional leaders' experiences with Chinese companies, particularly in exploiting community forests. He described how Chinese companies in this context have a poor record for respecting social and environmental prescriptions, and in fulfilling commitments made to local communities (the owners of the community forests). He ascribed this primarily to the companies' small size and limited technical and logistical capabilities and called on the companies to form an effective association and to work with partners to improve their capabilities for sustainability and local benefit.

4.5 Negotiating with Chinese infrastructure companies

Following the initial analysis summarised in section 3 of this report, project partners CED and GEI from China set about planning interaction with Chinese companies operating in agro-industry, mining and infrastructure sectors on their local practices, environmental protection actions and communications. These plans aimed to increase the benefits for local communities through improving the companies' community engagement practices and identifying specific actions which government could be urged to take.

Project partner CED liaised with a Chinese company in the mining sector to analyse its risk and conflict management system. CED also carried out fieldwork on perceptions about the company in three neighbouring communities. Results of the work were discussed with the company and CED was subsequently encouraged to liaise with government on the Mining Code (see below).

After considerable consultation with the Cameroon Electricity Development Corporation (EDC) and contractor China CAMC Engineering, which is building the plant adjoining the Lom Pangar Dam, project partners ran a workshop in Bertoua for the staff of both companies. It focused on labour practices, management and communications, and on environment and social regulations in Cameroon. Participants also discussed the issue of people being displaced from the plant site and the compensation programme. It transpired that EDC has been using an effective monitoring tool known as the Environmental and Social Clauses Book but has so far found it difficult to find solutions to some of the problems identified. The workshop helped EDC to identify the following ways to address these problems:

- Instructions and information for the contractor must be clear, precise and acknowledged as such.

- The labour legislation should be revised for clarity, coherence and comprehensiveness – notably on workers' accommodation, nutrition, health and salaries – while recognising the need for businesses to be competitive.
- Consultation processes and conflict resolution meetings should be improved and made more routine, and they should explicitly recognise and seek to manage cultural differences.
- Close monitoring of the company executing the works benefits all parties.
- Any financial penalty for non-compliance should be quickly issued and collected.

Following agreements made at the workshop, EDC and China CAMC Engineering have developed a community engagement plan in liaison with the project's partners.

Project partners GEI and CED also held discussions with Kribi port developers CHEC. CHEC in Cameroon and GEI signed a memorandum of understanding between them which aimed to "establish a sustainable development model for community work overseas by Chinese companies". The company agreed to help develop a practical and operational community engagement manual targeted at Chinese companies to help them work with communities more effectively, realise win-win development of communities and companies, and reduce the risks of overseas investment by Chinese companies. The plan was to pilot this in Kribi, by choosing a community to conduct a participatory programme with, including a community needs assessment, then to pursue livelihood improvement initiatives and other actions to implement agreements with communities. This would be done by establishing a systematic community engagement mechanism "with Chinese characteristics". To date, engagement between CHEC and communities has increased a little and although a sustainable development model looks a somewhat distant ambition, some commitments from the company have been secured and steps identified to improve community impacts, which CED and GEI continue to monitor.

4.6 Engaging with government

Potentially the possible influence on Chinese company practices is government's ability to provide incentives and enforce regulation. Where there are challenges to sustainability and local livelihood benefits, there is great potential for action from government agencies in both China and Cameroon to influence the practices of Chinese companies. The China-Africa Forest Governance Project partners therefore aimed to communicate, engage and work with individuals in government agencies throughout the duration of the project, notably with key players in the Ministry of Forests in Cameroon and in the State Forestry Administration (SFA) in China.

In addition to regular contact with government players, the project organised a range of specific actions to engage with policy processes and offer information and recommendations to government agencies. These included facilitating a visit of high-level SFA officials to Cameroon in 2016, involving talks with the principal officials of Cameroon's Ministry of Environment and Ministry of Forest and parliament, which created political opportunities for subsequent work with Chinese companies and further collaboration with the Cameroon government.

Later engagement with government in Cameroon on Chinese investments in land use was organised through interactions with high-level representatives from ministries, parliament, COMIFAC and some local CSOs. Discussion focused on the findings and ways forward on the project's draft studies of Chinese investments in key development sectors, summarised in earlier sections of this report. WWF, CED and NESDA also organised a national workshop to share and debate the results of different studies with policymakers and implementers from key government agencies.

The team was also able to draw on the project's findings to provide technical and financial support for the national consultation on revising the forestry law. The team also made detailed inputs to a working group, developing and validating civil society proposals for the next decree on applying the law n°2016/017 of December 2016 on the Mining Code. The proposals covered: consultation with local and indigenous populations; compensation due to communities; environmental protection; transparency and access to information; local employment; and funding of Local Development Projects. Each proposal required field evidence. CED also worked in this period with the Improvement of Extractive Industry Monitoring in Sub-Saharan Francophone Africa Project on its efforts to improve legal frameworks and mining conventions.

4.7 Investigative journalism

The project provided logistical and financial support to Chinese and African journalists to investigate and write about issues of Chinese investments in African forest land. They wrote and produced a range of investigative pieces which are referenced at points in this report. For example, independent journalist Sun Qian visited Cameroon during her investigation of the Kribi Deep Sea Port project and interviewed Chinese and French companies, local NGOs and community members. She then published two stories based on her investigations: for *The Initium*, "Holding China on the left hand and his village on the right hand: the two worlds of Chief Blaise"[1]; and, for DW Akademie, "Kribi, one city, one port, two worlds"[2].

[1] https://theinitium.com/article/20170821-international-AfricanVillageHead/
[2] http://www.dw.com/de/kribi-eine-stadt-ein-hafen-zwei-welten/a-41971133

Two Cameroon journalists, selected through a competitive process, followed Chinese investments and produced two features each in Cameroon's *Green Echoes*[3] newspaper and *NewsWatch Cameroon*[4]. The features covered Mekin and Menve'le dams and SUD-HEVEA and HEVECAM rubber plantations, each focusing on company-community relationships and social and environmental impacts. The *Green Echoes* articles are available online for a fee: "Spotlight on Chinese projects: appraisal of Hydro Mekin and Hevea Sud"; NewsWatch articles are available on request.

4.8 Conclusions: efforts to improve Chinese investments in Cameroon's forest

The work of the China-Africa Forest Governance Project partners reported on here has also generated some momentum for improving Chinese investments in land use in Cameroon. Key players in Cameroon – NGOs, community groups, government agencies, the media and some companies – have used previous drafts and findings from the analysis in this report to stimulate dialogue and practical steps towards policy and practice changes. Dialogue at events organised by the China-Africa Forest Governance Platform has been influential, according to its participants.

Working in Chinese among the timber traders on the ground has produced more accurate information, shared understanding with others, and commitment to engage in policy processes and make improvements; including through the work of a new association of some 23 Chinese companies in the Cameroon timber trade.

Project collaborator WWF ha pursued engagement with large forest concession-owning companies exporting timber to China, making some capacity gains apparently made but with questionable impact on legality or sustainability to date. This has also strengthened connections between these companies and the Responsible Timber Exchange and commitment to the FLEGT legal timber agenda. The team has also supported NGOs with information and training in mechanisms for engaging with the Chinese timber industry. This initiative has also proved that it is possible to negotiate with large Chinese infrastructure and agribusiness companies.

In this way, the project team has made progress in obtaining commitments from Chinese businesses to respect laws and source timber from sustainably managed forests in Cameroon. The project team has also increased local communities' capacity to secure the benefits of a responsible timber trade with Chinese companies. Work to push for better community engagement practices in some infrastructure companies has also generated some momentum. Proof of the real intent of these companies will be revealed by their actions over the next few years.

[3] https://ekiosque.cm
[4] http://newswatchcameroon.blogspot.com/

5 Ways forward

It is clear from the pronouncements of leaders in both Cameroon and China that they would like to see cooperation further deepening and, if it does, this is likely to continue to emphasise infrastructure development and exploitation of natural resources in Cameroon. The above analysis, and the practical efforts described to bring improvements to local livelihoods and sustainability, are not about China as such, but about China as the lead example of large-scale investment and its effects. Previous studies have found no significant differences between the forestry practices of Asian companies and of other companies, whether European or Cameroonian (Cerutti et al., 2011), and this work supports those findings. Claims about unsustainable practices, for example, have often been correct – but claims that Chinese or Asian logging, agro-industry or infrastructure companies are fundamentally different from all others are not. The degree to which market or regulatory pressure in China affects, or does not affect, the actions of Chinese companies in Cameroon is specific, but not unique.

Chinese investments – like any other investments – bring benefits and costs in widely varying proportions to Cameroon, and these benefits and costs look set to increase. Large fluctuations in this trend are highly likely, with peaks and troughs as plans and companies come and go; politics and economics in Cameroon, China and the wider world will see to that. Much is changing fast, but Chinese companies, large and small, are likely to grow in number and in their collective impact in the forests of Cameroon.

In engaging with Chinese companies and other organisations active in Cameroon land use, the China-Africa Forest Governance project has found a key gap in policymakers' and NGOs' ability (both in Cameroon and China) to connect with businesses, let alone influence their practices in the remote areas where investments often take place. The prejudice that many investors hold against NGOs (for being politically motivated), and

against local government officials (for seeking opportunities for personal enrichment), take a long time to overcome. Conversely, local groups and NGOs often distrust businesses without sufficient knowledge of their plans and operations. So, initiatives that explicitly aim to build understanding, trust and long-term relationships are key, and it is essential to involve bilingual speakers in Chinese and French or English in any team doing this work. This project found that it took about two years of relationship building before Chinese companies had enough trust to participate in workshops and public forums, and about another year before they would make any meaningful commitments.

In the forest sector, there is little sign of a general decline in the importance of the Chinese market for Cameroonian timber so plenty of work is needed to tackle the challenges to legality and sustainability prevailing among the companies, large and small, that are supplying that market. Trees will continue to be cut down, but they need to be the right ones in the right places, and they need to be used better. A huge shift towards sustainability among small-scale timber traders is urgently needed – and effective company associations will be critical. Increasing and improving the amount of further timber processing in Cameroon continues to be a vital way of generating more value locally, compared with exporting logs. Following some promising developments between Chinese companies and the government in Gabon, project partners developed thinking on 'forest-wise' processing areas, based on sustainable use of the forest resource and good returns to local livelihoods. Following in-depth study visits by Cameroonian forestry players to China and an exploration of what political support would be necessary, now real commitments are needed to develop sustainable forest product processing.

Chinese capital investments in small-scale mining and hydro-electric dam construction have a reputational challenge. They have been associated with lethal violence, significant ecological damage, non-compliance with existing socio-environmental legislation and abuse of local rights. The most prominent cases are the deaths at mining sites in the East Region and the flooding of local communities and indigenous peoples above the Mekin hydroelectric dam in the South Region. While these particular cases have specific causes and continue to require attention, most of the actions needed to prevent the situation deteriorating are in the hands of the companies themselves and government agencies. Huge challenges remain, but are at least better recognised.

Looking at each stakeholder group in turn, we suggest some crucial ways forward:

China-linked forestry companies, small forestry enterprises and traders

- Develop the information and means to engage directly with other stakeholders, particularly through associations; notably the new association of Chinese forest sector companies.
- Continue steps to commit to, practice and verify legal and sustainable forest management in all FMUs, and to increase local product processing.
- Timber importing companies, financers and investors in China should commit to, carry out and verify legal and green procurement.

Chinese infrastructure and agro-industry companies

- Sustain the established forums for dialogue between companies and local stakeholders.
- Continue to monitor and implement environmental and social management plans.
- Systematically implement socioeconomic programmes that generate additional income for communities bordering major infrastructure construction projects.
- Improve current corporate social responsibility practices and procedures to respect community land tenure, exceed basic requirements and meet international standards.

Government agencies in Cameroon and China

- Intensify and accelerate the establishment of legality verification and traceability systems for wood products from Cameroon, in the framework of the VPA-FLEGT process and the development of the China Timber Legality Verification system.
- Follow through on revision in Cameroon of both land tenure legislation, to clarify land rights and avoid conflicts, and forestry law, to give communities more local control of forest and NTFP resources.
- Prepare a major push to implement legal and regulatory provisions in the mining sector, then institute a period of closure for all semi-mechanised and artisanal mining sites to help re-establish the sector on a more regulated footing.
- Re-design the approach to governing the small-scale mining sector, based on practical systems for regulation and incentives. This would include the means to ensure that permits are held by appropriate entities and that operators systematically restore mining sites after operations have ceased.

- Enter into further bilateral negotiations between Cameroonian and Chinese forestry, agro-industry and mining authorities, so that both parties can use their leverage to deter illegal operations and foster sustainable ones.
- Strengthen awareness of Chinese state guidelines for responsible business conduct in overseas investments and pursue steps to make them binding in legislation.
- The Chinese government should also back more aid projects in forestry in particular. These should be based on joint needs assessment, context-specific design, and building organisations' capacity to support sustainable forestry.

NGOs working with government

- Improve the governance of infrastructure, agribusiness, mining and forestry developments by involving civil society and community representatives in establishing investment agreements before they are made; and in overseeing and maintaining engagement throughout the process.
- Regularly monitor the implementation of social, environmental and technical specifications for investment projects, to spot any drift from objectives, make any course corrections, and ensure completed works comply with design.

Actions to improve evidence, dialogue and capacity must continue, and contribute to structural reforms in Cameroon that enable more widespread development of locally beneficial sustainable land use. It is equally important that Chinese markets are pushed and pulled towards demand for sustainability, and that the due diligence and responsibility of Chinese companies abroad are tracked and scrutinised in China.

Issues in China-Cameroon relations affecting land use are already huge, getting bigger and changing fast. The China-Africa Forest Governance Project has shown that it is possible to engage with these issues and make some positive changes. Those who continue to build the evidence base for the right actions, the capacity to use it and the practical changes to make a difference will be doing forests and livelihoods in Cameroon a great service in the years to come.

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Chinese investment in Cameroon – in roads, water, electricity, ports, agribusiness and forestry – is estimated to be worth twice as much as all of Cameroon's other sources of investment combined. This brings benefits but also some major challenges for forests and community livelihoods – questionable land and resource acquisitions, challenges to sustainability of investments and sometimes violation of laws and exacerbation of poverty. This report introduces the nature and scale of the impacts, and an initiative which has engaged with them. It describes ways forward – building the evidence base for the right action, the capacity to use it and the policy and practice changes that could really improve the impact of China's investments in Cameroon's forests.

IIED is a policy and action research organisation. We promote sustainable development to improve livelihoods and protect the environments on which these livelihoods are built. We specialise in linking local priorities to global challenges. IIED is based in London and works in Africa, Asia, Latin America, the Middle East and the Pacific, with some of the world's most vulnerable people. We work with them to strengthen their voice in the decision-making arenas that affect them – from village councils to international conventions.

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