Forest Sector Development Programme

Lithuania - Sweden

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Department for Central and Eastern Europe

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Sida Evaluation 96/13 Department for Central and Eastern Europe

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Executive summary

This report is an evaluation of the Lithuania-Sweden Forest Sector Development Programme, which has been operating since 1992.

The parties of the Programme are BITS (now part of Sida) and the Jaakko Pöyry Consulting AB.

Basic settings of the Programme were to assist in the development of a modern forestry sector in Lithuania, replacing the former centrally planned economy and introducing a modern legal system, market economy, privatization, western style resource management and management systems, terminology, international standards and education and training of staff.

The evaluation concludes that the Programme has been relevant to the situation, has addressed important matters, is carried through successfully and has engaged a large number of staff of different levels in Lithuania. The Programme has had direct policy implication and assisted in modernizing the sector.

In terms of meeting the detailed and specific goals set forth in the Programme Document the fulfillment is almost 100%.

The major recommendation to Sida is to continue the funding of the Programme for at least another year.

The recommendation to Sida and the Lithuanian authorities is that the recipient side take more active part in Programme budgeting and implementation.

And general observation is that the needs of the sector in Lithuania is more in terms of resources like hardware and funds than in terms of advice and consultancy services.



EVALUATION

of the

Lithuania/Sweden

Forest Sector Development Programme

My Terms of Reference are dated 22 January, 1996 (Appended).

This report does not repeat all descriptions and pieces of information that are available elsewhere. One very important output of the Programme is that the forestry sector of Lithuania is now very well documented. The Main Report of the Programme (which forms the "MASTER PLAN") and its appendices, together with all the different reports on the projects, form an impressive volume of knowledge and background information. I was told that probably no other sector of the Lithuanian economy can show a similar and complete documentation. The consultant, the Jaakko Pöyry group, deserves credit for the important work of putting together, documenting and publishing in a nice form the forest sector information.

Current institutional structure.

The old structure of all forest land being owned by the state has been abolished and, as has already happened for agricultural land, forest land is subject to privatization - now ongoing. So far less than 10% of the total forest area is privatized, expectations are that within 2-3 years this process will be ready and that one fourth of the forest area will ultimately be in private hands.

Persons with a professional training in forestry has been allowed to procure small forest areas but privatization in general means the handing over of ownership to the former owners. It is often stated that the process is underway but working slow. However, seen in the context of its complexity, and the need for cadastral services and other technicalities in this connection, the present ambitions and speed would seem quite impressive.

The matter of price establishment for wood is still not settled, at least it does not happen as we are used to in the west, i.e. through negotiation between seller and buyer. (But I have been told that in some cases there are price negotiations between larger buyers and wood producers.) Wood prices are normally set periodically (for three months) in a process that includes both the Forest Enterprises and the Ministry of Forestry, but opinions differ whether enterprises are sellers or buyers. Some actors see the Ministry as a party in this process, a party that at least sanctions price changes. When the privatization process is over the likely development is that forest owners of different kind will organize themselves into forest owners associations, primarily to come to grips with the price setting mechanism.

The matter of establishing a regional authority to oversee (and control) the observance of the forest laws is solved in the sense that the decision is there but implementation awaits resources. Four regional offices are said to be manned which means that the remaining six are still non-existent. The matter is of course a major undertaking including new demands for both financial and staff resources. The principle of separating authority tasks from business, which is behind this development, must of course be honored.

Donor support to forestry

The forestry sector does not attract much external donor support. In addition to this Programme there are

- Finland, 1995; 15 000 USD for aerial photo of Birzai forest enterprise.
- Denmark and FAO, 1995; 1 461 000 (DKK) and 62 000 (USD) for a forest pest control project.
- Denmark, Ministry of Environment and Energy, 1995; 490 000 DKK for implementation of the multiple forest use project in Dubrava experimental forest enterprise.
- EU, 1995; PHARE, 350 000 ECU for implementation of Dubrava nursery modernization project a large forest nursery for which Hedeselskabet from Denmark has been selected as consultant.
- Germany, Norway and GB supports certain smaller exchange programmes for specialists amounts not known.
- Request for international support to feasibility study on CTMP has been made.

Another recent event is an evaluation of research in Lithuania, carried out by The Research Council of Norway. The report of this evaluation covers many research sectors, also Agricultural Sciences which includes forestry. This is a comprehensive exercise dealing with size, overall structure, financing, working conditions, priorities, international cooperation etc, which cannot be summarized here. Be it enough to note that forestry research is seen as important for Lithuania and that the setting of research priorities needs attention. Library resources are reported not to be adequate.

The role played by BITS/Sida in the overall development of the forestry sector of Lithuania.

I will come back to this question in the following when going through all Programme activities. The following few lines can stand as a summary.

All projects of this Programme are relevant and well managed. Cooperation between the consultant and the local establishment seems to be very good. The services of the Programme are requested and in many cases demand driven. The Programme is timely and has assisted in several cases to influence policy and national priorities.

Institution building and capacity building has been the aim and core of the Programme - and rightly so.

But it also belongs to the picture that the Lithuanian society is a highly developed one, with competent people, functioning educational structures and awareness of modern tendencies of development as elsewhere in Europe. Therefore it is no wonder that my evaluation becomes positive. The Swedish assistance is working in an environment that is quite aware of its possibilities and limitations. This is of course well understood in the Lithuanian administration - and by the operating consultant as well.

Review of Programme activities

Project 1: Forest Administration and Legislation

With the assistance of the Programme Lithuania is now equipped with a modern forest law. The need to support the process of establishing a new legislation was identified during the initial stages of the Programme as it had become a necessity after the breakaway from the former regime.

The result, a new forest law coming into force on 1 January 1995, was a major undertaking in which the Programme was instrumental. It is a safe conclusion that had the Programme not been active in this field the promulgation of a new law would not have happened so quickly. The Programme assisted in the process by providing examples of forest legislation from other countries and by drafting, explaining and discussing pros and cons of different solutions with the Lithuanian counterparts.

The new law is modern in the sense that it addresses the issue of forest production versus environmental matters, includes both state and private forestry and also deals with legal rights to enter private land.

The Programme was also involved - basically in an advisory capacity - in the work of formulating the regulations needed for law implementation. This work is ongoing.

The changing conditions for forestry in Lithuania, including privatization of forest land and the new forest legislation, require changes and adaptation of the state forest administration. The Government therefore decided to establish a new forest authority, regionally oriented, with the task of implementing the new legislation using new approaches and working routines.

Also regarding this aspect has the Programme played an important role. Through the provision of competent advisors and an active partnership did the Programme assist in policy formulation. Decisions to implement the new organization are there, the directions have been set and it is mainly the present lack of staff and other resources that together with the general level

of uncertainty and rapid change slows down implementation. My impression is that the new organization will be put in place successively in the near future.

There has been a substantial influence from Sweden to this process, and there is certainly a risk of "Swedification". The consultant (the JP group) is Swedish, most - if not all -advisors have been or are Swedish, and the Swedish forestry legislation has been one of the cornerstones. Thus the risk of a Swedish design is obvious. When noting this fact I also note that the Lithuanian counterparts have been aware of the same risk and therefore tried, and in my view also succeeded, to avoid most of that. But it also belongs to the picture that Lithuania and Sweden are neighbors and that both cultural and bio-physical conditions are closely related, the conclusion being that a certain level of "Swedification" perhaps would not be too frightening.

The entire complex of law and regulations seems however bureaucratic. There are more signs of bureaucrats than of business people in this package - and naturally so.

This project contains the following activities (F = fulfilled O = ongoing N = not achieved)

- 1.1. Final revision of the new Forestry Act.
- 1.2. Preparation of complementary regulations F+O (Swedish part fulfilled, directives for private forestry and state forests plus few other are ready but work continues.)

F

- 1.3. Establishment of a regional forest authority F+O (Regional authority established in principle and four regions are manned. Rest ongoing.)
- 1.4. Elaboration of working routines for above F+O (Preliminary proposal ready. To be brought forward in coming phase. Activity slowed down due to economic restrictions.)
- 1.5. Education and training of central and district F officers in legislation and forest admin.
- 1.6. Education and training of above through study tours F

My assessment of this Programme activity is that it is (or has been) very relevant, timely and professionally managed. The project assisted in the difficult process of policy reform and was instrumental in its implementation. Basically are the Swedish commitments fulfilled but processes are such that they are continuous, and thereby "ongoing".

Project 2: A National Monitoring and Management Information System.

This project contains two major components

- a revised National Forest Inventory NFI
- a Forest Forecasting and Information System FORIS

The core of this package is the forest inventory providing data on the forest resource and its changes. Present information is based on standwise inventories with a ten year rotation. This method has a long tradition, developed in Central Europe, well established and well known. Regional and national level data can be produced through aggregation. The drawback is that data is up to ten years old and therefore do not well reflect for instance changing environmental conditions such as acid rain and atmospheric nitrogen supply, which have immediate impacts on forest growth.

A new method has been proposed based on another statistical design. The design is similar to that of the Swedish National Forest Inventory.

The Programme has pushed the matter and the new method is now to be tried in an experimental scale during the summer of 1996. Methods, training, equipment etc are in pipeline.

Without going into detail I note that present opinions regarding the growth of the forests of Lithuania vary quite considerably, as do also the opinions on suitable cutting levels. My own belief is that the capacity of the forest capital is underestimated at present and that, therefore, the forest resource is underutilized. The whole matter is however complicated and involves items like data reliability, policy, intensity of silviculture, investment availability, and possibilities, capital market export development etc which should not be elaborated on here. Be it enough to say that the base for the entire exercise is the forest resource itself and that without credible basic data strategic planning becomes difficult. I have noted that the whole matter is under discussion and review and that a final decision to change the design of the inventory is not yet taken. For my own part I note with admiration the competence and seriousness demonstrated amongst Lithuanian foresters and policy makers regarding this matter. The entire affair is under debate and a final decision whether to change or not change the present system is said to be taken during 1996.

The FORIS is based on a GIS to which is added and integrated a number of applications for forecasting and monitoring of the forest resource base and the sector as such. The basic technical set-up has been installed at the Forest Planning Institute in Kaunas. The system is functioning at the present level of application and produces e.g. good maps with different layers of information. The facilities are operated by a group of young and interested staff - the new generation brought up together with computers - and is certainly a first class training facility. But it is also expected that the FORIS will soon become both useful and powerful, and utilized by practical forestry at a large scale.

It is noted that the computer equipment installed not more than

one or so year ago is already considered too slow for present applications. Staff operating the equipment ask for improved capacity.

This project contains the following activities (F = fulfilled 0 = ongoing N = not achieved)

2.1. Development and installation of computerized system F (Hardware and software installed. Initial training performed.) 2.2. Overall design of MIS F (Ready, including sub-components and future organization.) 2.3. Basic design of National Forest Inventory F 2.4. Basic design of GIS F (This activity is ahead of schedule.) F 2.5. Basic design of Planning and Follow-up System (Overall structure OK. System engineering by sub-component delayed as work has focussed more on activity 2.4 as being more important.) 2.6. Research and development of growth & yield functions (Work not started.)

My assessment is that this component is relevant to the situation of Lithuania, the inputs are demanded by the "system", that project activities are professionally sound and the level of "Swedification" acceptable. The Programme has been instrumental in making feasible changes happen and introduced new ideas and concepts. The future developments seem now to be more and more in the hands of local forces - which is a sign of good health. It is of course important that all this development is demand driven. Management information systems are tools in day-to-day management and planning - not fancy gadgets. The conclusion of this last statement is that the Programme's budget resources could well be more directed towards equipment and hardware support than to advisory services. It is my firm belief that national human resources are well able to take the steering wheel in future development of these matters.

That research work on yield functions etc. has not started is not surprising as such efforts demand very specific inputs. The matter is related to the build-up of a credible and sustainable R&D function and does not fit very well into this Programme.

The basic aim of this activity is to open the Lithuanian forestry sector to the European and world markets. Business relations, contracts, rules of delivery, price negotiations etc, all such activities need a base of common ground in technical terms, standards and measurements.

This is a most impressing activity, from concepts down to "knots

and bolts" in which a large number of organizations and individuals have participated. I am particularly impressed by the enthusiasm of the staff of the Kaunas Technological University and its Design and Technology Faculty which has coordinated much of the work. There are now several National Standards decided upon and many more and underway.

The consultant has assisted this work in an active way and supported by providing reference material and in reviewing the work successively.

This project contains the following activities (F = fulfilled 0 = ongoing N = not achieved)

- 3.1. Elaboration and impl. of a system for classification of sawn wood

 3.2. Same for testing and quality classific. of furniture

 3.3. Same for wood fuels

 3.4. Education and training of concerned staff

 (Seminars have been organized rega. sawn wood and furniture, but not for wood fuels.)

 3.5. Study tour to Sweden on above

 F
- As noted earlier some activities are more like ongoing processes than terminated activities. (From a Programme point of view the task may be fulfilled but from the Lithuanian perspective the work goes on.)

My assessment is that this project is very relevant and necessary. It is well managed by the "system" and well supported by the consultant. The results of the activity are already present to a considerable extent. It now remains to finalize the matter and start training and instruction activities. For obvious reasons much of the work is carried out by Lithuanian staff - but cooperation has been fine.

Project 4: Wood and Biomass Measurement Systems

The main purpose of these systems is to give a basis for pricing and payment of the products. It goes without saying that such systems are necessary tools in forestry, without them would the commercial parts not function.

A final report and proposal was published last year in September. The report gives a good framework and is a suitable starting point. An important recommendation in this connection is that a separate Wood Measurement Council be established including representatives of concerned parties, authorities and research and development agencies.

It is easy to support this recommendation. In Sweden there is since many years a similar organization which has proven to be very important in both policy setting and implementation. But even more important is that through such an instrument the

development of this sub-sector becomes an internal affair, driven by business partners and their demands.

To find a credible system for commercial handling of biofuels is equally important. It is very likely that in Lithuania, as in other countries, a certain and considerable part of the forest production will go as energy. (In Sweden the market for wood based biofuels has increased strongly in recent years and is now more than 10 TWh.) Not only can this sub-sector help in providing energy to the general public, it can also save currency in reducing the dependence on coal and oil and, thirdly, become an important outlet for the large amounts of small-sized wood from the forestry sector, a big problem at present.

This project contains the following activities (F = fulfilled O = ongoing N = not achieved)

- 4.1. Dev. and impl. of a system for measurement of F+O industrial wood raw material
- 4.2. Same for wood fuels and tree biomass

F

4.3. Training of concerned staff

F+O

(Two short courses delivered but as the wood measurement system is not yet finally decided upon, and the responsibility for education and training is also pending, this activity is still "ongoing".)

4.4. Study tour to Sweden rega. above

F

All taken together I find this activity, although not all that glamorous in itself, very relevant and important. The consultant managed this activity well and succeeded to involve in the process a large number of local forces - that is not a bad record. If the national system can now take the necessary decisions, as for instance concerning the establishment of the Wood Measurement Council and a Wood Measurement Law, Lithuania will take a great step in the process of providing instruments for market orientation and business in forestry.

In this activity two Forest Enterprises were selected to act as forerunners and demonstration enterprises. After a period of analysis a programme of modernizing and change started in Phase III. This activity includes improvement in all major sectors, wood production and harvesting, sawmilling, marketing, administrative procedures etc. A large number of experts of the consultant has been involved in these activities including the training of staff at different levels.

I visited the two concerned FEs in Vilnius and Taurage' and can therefore testify that the changes have been quite dramatic. It seems that the proposals of the consultant has been accepted in most cases and that implementation is now underway. There are no

great conflicts - yet. It should be noted though that the Programme means reduced employment in a near future and that this matter is likely to cause some concern. At the same time it must be allowed that enterprises strive for higher profits and understood that such profits are in fact the basic means for jobs and employment.

An area in which a lot of things need to be improved is labor safety and ergonomy.

This project contains the following activities (F = fulfilled O = ongoing N = not achieved)

- 5.1. Selection of suitable FE's and collection etc of data F
 5.2. Review and development of organization F+O

 (Review OK and various alternatives for future organization presented but final recommendations not yet given.)
 5.3. Review and development of harvesting and transport F
 5.4. Same for sawmill operations F
 5.5. Same for marketing and sales F+O

 (Marketing and sales functions reviewed and recommendations for further development prepared.)
- 5.6. Same for administrative and economic systems F+O (The administrative systems are reviewed and recommendations proposed. Computerization ongoing. Short seminars/workshops delivered.)

My evaluation is that this activity is oriented towards the future and helps put forestry in the frontline when modernizing the industry. The Programme has assisted in introducing modern management and has been instrumental in guiding the way for such work. It is likely that this project will show to be of great importance for the future - also outside the forestry sector. I note that particularly the direct training of workers through instructors "on the floor" is very much appreciated and that more of the same is requested.

Project 6: Education and Training

There are three major reports in this project guiding the activities:

- Basic Vocational Training for Forest Workers
- Supplementary Education and Training for Staff and Workers within the Sawmill Sector
- Basic Vocational Training of Sawmill Workers and Education of Sawmill Technicians.

These reports give a full and comprehensive picture of the situation including both concepts and more practical suggestions as related to implementation of the project.

The vocational school at the Forestry College in Girionys has

started and three additional vocational schools are said to be established. Teachers and instructors have been trained in Sweden. (Training of forest workers is a separate project with a kind of mother-daughter relation to the Programme.) A proposal for sawmill worker training has been elaborated and there are preliminary set-ups in Kaunas at different institutions. There is a lot of activities.

Certainly there is a need for training at different levels, not least of workers. People are very laborious and adequate training would no doubt raise their productivity and improve safety and occupational health. It is in fact easy to support these activities as they so directly address the individual worker.

This project contains the following activities (F = fulfilled O = ongoing N = not achieved)

- 6.1. Establishment of pilot unit for vocational F training of forest workers
 6.2. Elaboration of a package of courses for complementary training of FE staff and workers (Proposal ready)
- 6.3. Establishment of unit for training of sawmill workers O (Proposal delivered, actual training included in the coming phase.)
- 6.4. Elaboration of courses for complementary training O of staff and workers of sawmills (Proposal prepared.)
- 6.5. Elaboration and performance of a training course in Forest Economy F

My assessment of this activity is again positive. Problems in the sub-sector are correctly analyzed. Suggested action is relevant and modern. The recipient institutions are interested and the process is demand driven to a large extent. I have all reasons to believe that this activity will show to be sustainable.

Major issues with regard to the execution of the Programme

The first major issue, as noted already, is that the Programme is successful, timely and well managed. Lithuanian staff at different levels that have been related to the project are basically positive or very positive. Only few cases of "not good enough consultants" or failures were told to me.

A somewhat weaker point is at another level. I have the opinion that planning and budgeting of the Programme's activities have been too much a Swedish undertaking and that plans are more coming out of the Jaakko Pöyry office than from concerned parties in Lithuania. As the operating consultant has shown a good understanding of the present situation of Lithuania this problem becomes less prominent, but deserves to be observed as a matter of principle. It seems to me that the "Lithuanian system" has not been aware of the basic wish of the donor organization that

programmes, plans and budgets shall be, preferably, a recipient's effort.

Another observation is about the counterpart's contribution to the Programme. In a formal sense the Programme is financed through Sida and the budget is a Swedish contribution. It seems that nobody has tried to calculate the Lithuanian contributions and that, therefore, the local interest in the project in money terms is not known. But there are many resources from the Lithuanian side that goes into the activities: building and housing, staff time, transportation and other local costs of different kind. A rough estimate brings these local costs to the level of 15-20% of the Swedish contribution. However, the directly budgeted contribution to the Programme (Lit. 200 000 per year) is quite small and aims at covering only certain transport and hotel costs.

Yet another observation concerns the balance between hardware and software. This observation perhaps directs itself more to the internal Swedish system than towards the Programme. However, as things stand and with the great capacity - culturally and intellectually and knowledge wise - of the "recipient", his needs are much more in the area of hardware than of software like advice and consultancy services. This should not be seen as a criticism of the present Programme, but more as a result of a very rapid process of development after liberalization, which now, five years later, call for other approaches of support. In short: in Lithuania people know very well what is needed in most cases, but they have few resources.

Still another observation is that the absorptive capacity of the Lithuanian forestry system is very large, and that the project has in no way been able to approach the point where the absorption capacity ends. The Programme is in reality more like a cooperation effort by two equal partners than a relation between a donor and a recipient.

The matter of continued support

I recommend that Sida would finance a fourth phase of the Programme.

But I would like to suggest that Sida, before taking final decision regarding the future of the Programme, be it the last phase or not, gives the Lithuanian side the possibility of revise the proposed budget for Phase IV in order to get it as well adapted to present local needs as possible.

Another issue is to find a suitable tapering-off procedure in a programme of this type so that all activities do not have to be stopped in a too abrupt way. Perhaps would a "Consultancy Fund", managed by the Ministry of Forestry, be an useful idea.



TERMS OF REFERENCE

Evaluation of BITS/Sida's support to the Forestry Sector in Lithuania

Background

BITS has been providing support to the Lithuanian forestry sector since 1992. By the end of 1995, three phases of a development program for the sector have been implemented to a total cost of approximately 12,6 million SEK. A program for continued cooperation, amounting to approximately 6,2 million SEK, has recently been requested for by the Lithuanian Ministry of Foreign Affairs.

The three phases that have been implemented so far are the following:

- 1) Base Surveys and Identification of Development Options (April October 1992), 2,4 million SEK.
- Analyses and Formulation of Sub-Sector Development Programmes and Elaboration of an Overall Development Strategy - a Forest Sector Master Plan (November 1992 -December 1993), 4,8 million SEK.
- 3) Detailed Design and Implementation of Selected Projects and Action Plans (July 1994 December 1995) 5,4 million SEK.

In view of the comprehensive program that has been undertaken, Sida has decided to make an evaluation of the activities that have already been performed and a review of the need for the proposed and other further support, through an independent consultant.

Purpose

The purpose of the assignment is to evaluate the effectiveness of the support so far provided through the forest sector development program, and identify the need for the proposed or other further support.

Scope of work

The scope of work will include the following:

 Map out the current institutional structure as concerns the forest administration in Lithuania, including the current legal framework, and identify major changes in the process being implemented;

- 2. Map out donor support from all different sources and not only from Sida to the forestry sector in Lithuania. Identify the thrust of the support or the different sources of support;
- 3. Identify the role played by BITS/Sida's support within the overall development of the forestry sector in Lithuania with regard to institutions as well as enterprise level;
- 4. Review the activities funded so far by BITS/Sida, identify their specific roles, their objectives, and any performance indicators specified for the project. Assess the project against these roles, objectives and performance indicators;
- 5. Identify major issues with regard to the execution of the BITS/Sida support, the manner in which it has been implemented both with respect to the provision of technical assistance services and the arrangements and absorptive capacity on the Lithuanian side; and
- 6. Identify the need for the proposed and other further support, and the scope, objectives and arrangements of such support.

Method of work

The Consultant will collect the required material from Jaakko Pöyry Consulting AB, who has been the lead consultant for all the activities provided to date. He will then visit Lithuania for a one week fact-finding mission.

Reporting

The consultant will submit a draft report to Sida no later than 15 February, 1996, and a final report to Sida no later than 20 March, 1996.

Undertakings

Sida will be responsible for arrangements with the Lithuanian counterpart for preparation of the program for the mission to Lithuania. The Consultant will, together with the Lithuanian counterpart, be responsible for practical arrangements in conjunction with the mission. Sida will make available or cause to make available all written material (reports, project preparation documents, project completion reports, etc.) deemed to be of relevance to the evaluation exercise by the Consultants and Sida.

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