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Preliminary Assessment on Stages of Community Forest Enterprise Development in Myanmar

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Contents

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Abstract

The concept of community forestry was instituted in Myanmar since 1995 to address the environmental degradation and to support basic- needs of local community. The core objective of revised community forestry instructions (2019) is to pave the way for the development of community-forest based enterprise. This study examines 311 forest user groups from 25 Forest Districts in order to investigate the stages of CFE in terms of incomes from community forests and to identify the mechanisms for community forest enterprise development in Myanmar using CFEs the stages of development framework in terms of subsistence, early, developing and mature. The data were collected from states and regions of Forest Department through on-line survey. The results show that 48% of community forest user groups are for their own consumption and selling small surplus to local markets. 52% of total collected cases have no information for cash income, of which, benefits of 60 % of community forest user groups are likely to be ecosystem services from the watershed conservation. Among the 17 Forest Districts, 65 % receive income as a subsistence income while the remaining 35% show to reach beyond the subsistence stage in terms of annual income.

Key Words: Basic-needs, Community-forest based enterprise, Subsistence, Consumption

မြန်မာနိုင်ငံတွင် ဒေသခံပြည်သူအစုအဖွဲ့ပိုင်သစ်တောအခြေပြုစီးပွားရေးလုပ်ငန်း ဖွံ့ဖြိုးတိုးတက်မှုအခြေအနေများအပေါ် ကနဦးလေ့လာဆန်းစစ်ချက်

ဒေါက်တာ အိအိဆွေလှိုင်၊ လက်ထောက်ညွှန်ကြားရေးမှူး
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စာတမ်းအကျဉ်း

မြန်မာနိုင်ငံတွင် ဒေသခံပြည်သူအစုအဖွဲ့ပိုင် သစ်တောဆိုင်ရာ သဘောတရား (အယူအဆ) ကို ပတ်ဝန်းကျင် ယိုယွင်းပျက်စီးမှုကို ဖြေရှင်းဆောင်ရွက်ရန်နှင့် ဒေသခံပြည်သူများ၏ အခြေခံလိုအပ်ချက်များကို ထောက်ပံ့ပေးနိုင်ရန်ရည်မှန်း၍ ၁၉၉၅ ခုနှစ်မှ စတင်၍ကျင့်သုံးအကောင်အထည်ဖော်ဆောင်ရွက်ခဲ့ပါသည်။ အသစ်ပြန်လည်ပြင်ဆင်ခဲ့သော ဒေသခံပြည်သူ အစုအဖွဲ့ပိုင်သစ်တောဆိုင်ရာ ညွှန်ကြားချက်များ (၂၀၁၉)၏ အဓိကရည်ရွယ်ချက်မှာ ဒေသခံပြည်သူအစုအဖွဲ့ပိုင်သစ်တောအခြေပြုသော စီးပွားရေးလုပ်ငန်းများ ဖွံ့ဖြိုးတိုးတက်လာစေရေး လမ်းဖွင့်အားပေးကူညီဆောင်ရွက်ရန်ဖြစ်ပါသည်။ ဤလေ့လာမှုတွင် သစ်တောခရိုင် ၂၅ ခုရှိ သစ်တော အသုံးပြုသူအဖွဲ့ပေါင်း ၃၄၇ ခုအားဒေသခံပြည်သူ အစုအဖွဲ့ပိုင် သစ်တောအခြေပြု စီးပွားရေးလုပ်ငန်းဖွံ့ဖြိုးမှုအဆင့် သတ်မှတ်ချက်မူဘောင်(တစ်ပိုင်တစ်နိုင်အဆင့်၊ ရှေ့ပြေး (ဖွံ့ဖြိုးစ) အဆင့်၊ ဖွံ့ဖြိုးဆဲအဆင့်နှင့်အောင်မြင်သည့်အဆင့်) ကို အသုံးပြု၍ ဒေသခံပြည်သူအစုအဖွဲ့ပိုင်သစ်တောမှ ဝင်ငွေရရှိမှုသည် ဒေသခံပြည်သူ အစုအဖွဲ့ပိုင် သစ်တောအခြေပြုသော စီးပွားရေးလုပ်ငန်းများ ရှင်သန်ဖြစ်ထွန်းစေရေး မည်သို့အထောက်အကူပြုကြောင်း အကဲဖြတ်သုံးသပ်ရန်နှင့် ဒေသခံပြည်သူ အစုအဖွဲ့ပိုင် သစ်တောအခြေပြုသောစီးပွားရေးလုပ်ငန်း ဖွံ့ဖြိုး တိုးတက်မှုအတွက်သင့်လျော်သော နည်းလမ်းများကို ရည်ရွယ်လေ့လာခဲ့ပါသည်။ အချက်အလက်များအား တိုင်းဒေသကြီးနှင့် ပြည်နယ် သစ်တောဦးစီးဌာနများထံမှ on-line စနစ်ဖြင့် စာရင်း ကောက်ယူခဲ့ပါသည်။ လေ့လာမှုရလဒ်များအရ အသုံးပြုသူအဖွဲ့ ၅၇%သည် မိမိတို့ ကိုယ်တိုင်စားသုံးရန်နှင့် အနည်းငယ်ပိုလျှံသော ထွက်ကုန်များကို ဒေသဈေးများ တွင် ရောင်းချရန်သာ ထုတ်လုပ်နိုင်ကြောင်းသိရှိရပါသည်။ စုစုပေါင်း စာရင်းကောက် ယူမှုများ၏ ၄၃% ထံမှ ငွေကြေးဝင်ငွေအဖြစ် သတင်းအချက်အလက် မရရှိသော်လည်း အသုံးပြုသူ

အဖွဲ့များ၏ ၆၁%သည် ရေဝေရေလဲ ထိန်းသိမ်းခြင်းဖြင့် ဂေဟစနစ်ဝန်ဆောင်မှုများမှ အကျိုးကျေးဇူးရရှိကြောင်း သိရှိရပါသည်။ ဝင်ငွေရရှိသော သစ်တောခရိုင် ၁၇ ခရိုင် အနက်၆၅% သည် တစ်ပိုင်တစ်နိုင်အဆင့် ဝင်ငွေ ရရှိလျက်ရှိပြီး ကျန်၃၅%သည် နှစ်စဉ် ဝင်ငွေအဖြစ် တစ်ပိုင်တစ်နိုင်အဆင့်ကို ကျော်လွန်ရောက်ရှိနေကြောင်း ဖော်ထုတ်တွေ့ရှိရပါသည်။

Preliminary Assessment on Stages of Community Forest Enterprise Development in Myanmar

Introduction

In the early 1990s, ASEAN member states including Myanmar introduced community forestry as a way to address forest degradation and to support the basic needs of rural communities. The scholars pointed that the key challenges for scaling up community forestry is to make community forest economic viable. Developing community forest enterprise and helping community forest products and services to reach markets would be one way to overcome this challenge (RECOFTC, 2017). Based on lesson learnt, the governments in ASEAN member states consider benefits of income and ecosystem services from conservation of community forests by reforming respective policy. For instance revised laws in Myanmar and Lao PDR laid the foundations for using social forestry as a mechanism for community-based enterprises (RECOFTC, 2017). In Indonesia, social forestry becomes national program that aims to achieve economic quality and reduce economic inequality through the three pillars of land, business opportunities of land, business opportunities and human resources (Pambudi, 2020).

Community Forest Enterprise (CFE) is defined as an entity that undertakes a commercial business based on forest or trees. It is overseen by a credible representative body that acts as a certificate holder. The enterprise can claim legitimacy within a self-defining community in terms of people and area, and it generates and redistributes profits within that community (Macqueen 2008). According to CFI (2019), community forest based enterprise-CFE means harvesting of wood and non-wood forest products, foods, and value-added products from the community forest, and trading them in the local and international markets in accordance with the standing laws, or business conducting local community-based tourism.

Based on policy papers developed by ASEAN Social Forestry-ASFN in 2016**,** it can be summarized that successful community-forestry based enterprise in ASEAN has different feature and forms. For example, Vietnam focused on mutual partnership in which Forestry Company of Tree Planting provide seedlings, technical support and the capital while community investment was either in land or labour. Forest Honey Network in Indonesia is consists of over 400 persons within 12 honey groups and 2 forestry cooperatives covering an area of 25000 ha. Then, Forest Honey Network has partnered with multilevel marketing giant to distribute forest honey across Indonesia. Another example is the family-led enterprise in Thailand that sells arabica coffee as green beans for domestic consumption and export (RECOFTC, 2015). There are also women group income-generating activities.

Community Forestry Instructions in Myanmar was adopted in 1995 and the government initiatives have focused on the promotion of community-based conservation and the fulfillment of subsistence needs. In response to the local, national and regional needs, the Forest Department revised the CFI (1995) to CFI (2019), which provide the communities not only access their resources but also profit from them. As of December 2021, 966240, 14 acres of CF had been established throughout the country with the participation of 7013 community forest user groups which represents

178,558 households. CF strategic plan sets a target to form 50 small-scale CF products-based enterprises across the country.

Along with the policy reforms such as Forest Law (2018), Community Forestry Instructions (2019), Community Forestry Strategic Plan, the development organizations and civil societies paid attention to investigate the challenges and opportunities for CFE development (Tint et al, 2014; UNDP, 2019, World Bank, 2020). They highlighted legal and technical issues, limited technology for products development, market and economy issues and lack of interest of forest officers in CFE enterprise. Macqueen (2012) and Tint et al (2014) recommended market-let thinking and different forms of co-ordination mechanism for CFE development. A few studies have been assessed how the community forest products income contribute to level up the enterprise development. The objective of this study is to investigate the stages of CFE in terms of incomes from community forests and to identify appropriate ways for community forest enterprise development in Myanmar context.

Materials and Methods

Research Site

As noted, there are 966,240 acres of community forests in states and regions of Myanmar. Among them, Sagaing Division has the highest number of community forest area followed by Shan State and Magway Division whereas Mon State has the lowest number of community forest area. This study covers 311 USGs which were located in 26 Forest Districts of Kachin, Kayin, Sagaing, Mandalay, Ayeyarwady, Yangon, Rakhine and Chin states (Figure 1 and Table 1). The types of forest and natural vegetation vary across regions. The types and size of community forest and minimum and maximum number of CFUGs are shown in the Table 1.

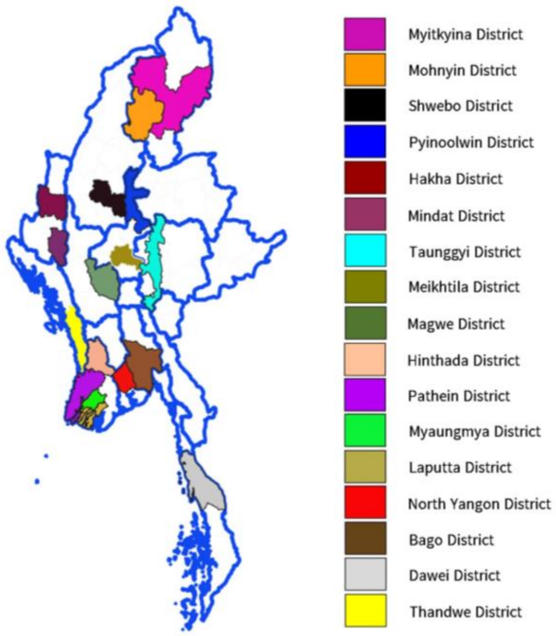

Figure 1. Showing the Studied Districts

Data collection and analysis

This study used the data and information collected from States and Regions of the Forest Department office through on-line survey in 2018. Collected information include number of CF acres either in plantation or natural forest, amount of home consumption, amount of surplus products that sell in the market and annual income from selling forest products. The strategies used for selecting values for market products and products not marketed are based on CIFOR (1998) which highlighted the method for the development and conservation of forest products for local communities. The key steps in valuation are determining: (1) the number of units sold or consumed; (2) the value of the good for a specific unit; and (3) an estimate of the costs. The monetary values of the good are identified using imputed values.

The collected data were simply analyzed using excel data sheet to access the income from community forests for CFE development. Supplementary information was collected by conducting phone interview with respective community forest user groups and reviews of previous studies to identify the mechanisms for CFE development in Myanmar context.

Table 1. Numbers of studied districts and CF user groups

No.	States/ Regions	# of Districts	# of CFGs	Range of CF Area (Ac)	Range of CF Members
1	Ayeyawaddy	4	34	1321.00 – 10.00	124 - 5
2	Bago	3	13	704.00 – 7.50	69 - 5
3	Magwe	2	3	75.00 – 13.00	74 - 23
4	Mandalay	2	19	550.00 – 6.00	84 - 5
5	Sagaing	1	8	1000.00- 8.50	30 - 5
6	Tanintharyi	1	14	2437.00 – 47.00	120 - 11
7	Yangon	2	18	594.00 – 4.00	484 - 5
8	Kachin	2	61	6325.00 – 7.00	272 - 5
9	Chin	2	20	521.00 – 14.00	50 -6
10	Mon	1	1	15.00 – 15.00	5 - 5
11	Rakhine	2	11	1000.00 – 30.00	130 - 27
12	Shan	4	109	1469.00 – 9.36	538 - 5
	Total	**26**	**311**	**6325.00 – 4.00**	**538 - 5**

Analytical Framework

As noted, this study examines 540 cases in order to assess how incomes from CF contribute for the enterprise and to identify the appropriate ways for CEF development in Myanmar context. We used CFEs: stages of development framework adapted from Feris et al and Greijmans (2012) as shown in the figure. According to the framework, there are four stages of development: subsistence, early, developing and mature. The concept of each stage is described blow.

a. **Subsistence:** If individual CF members are producing mainly for their own consumption and selling small surplus to local markets, it is considered as subsistence stage. They are uncertain to nonexistence access to services and no use of purchased inputs. Low asset accumulation and being most vulnerable are usually found in subsistence stage.

   Examples: unorganized, individual collection of fuel wood, forest foods, NTFPs, and selling surplus forest products on an ad-hoc basis etc.

b. **Early***:* In this stage, CF members started to operate in small-scale rural enterprises form with low levels of value addition and weak business orientation. Social cohesion among group members is emergent. However, access to services is incomplete and irregular and which limit the prospects of enterprise growth.

   Examples: communal collecting and selling fuel wood and honey etc.

c. **Developing***:* Commercially oriented enterprises with higher level of social cohesion that have incorporated value adding handling and/or transformation process and product diversification are seen in developing stage. CF products are being sold into local, regional and national markets. In addition, CFEs have access to appropriate services that permit enterprise growth.

   Examples: organized group activities such as planned and community agreed fish and shrimp production in mangrove areas, medicinal orchid cultivation, bamboo shoot collection and value addition through pickling process etc.

d. **Mature:** Community Enterprise fully integrated into supply chains producing products that meet market demands in terms of quality and frequency of supply, both nationally and for export are the main features of mature stage. CF members are capable of identifying and paying for required business development services in the mature stage.

   Examples: well organized chain of processing forest products, large scale production and trade of rattan, investing in eco-tourism etc.

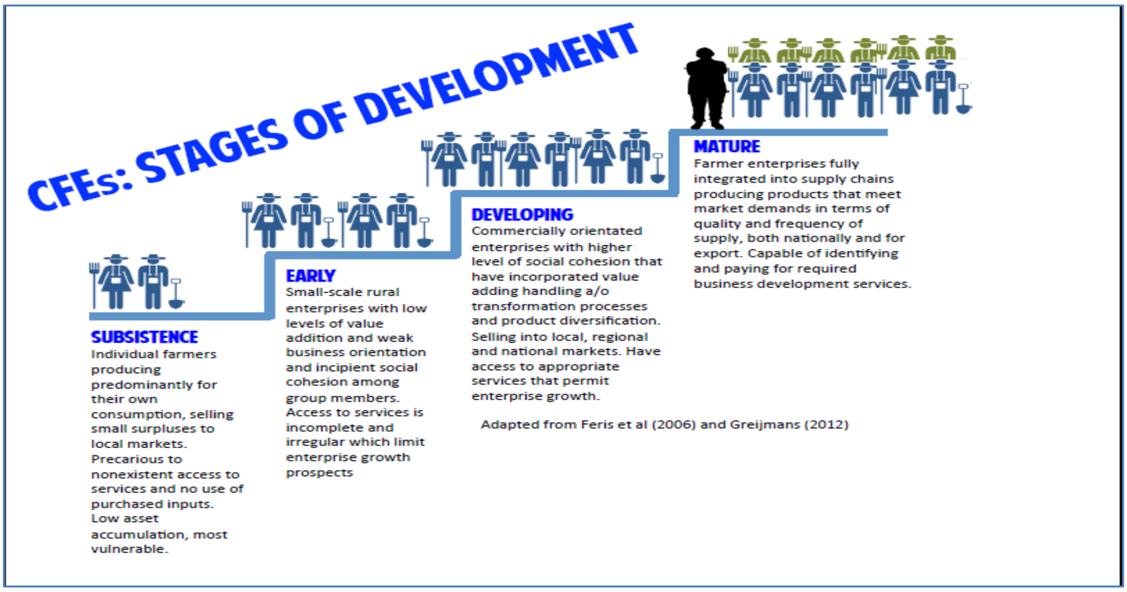

Figure 2. Stages of CFE Development

Results and Discussions

Cash value for home consumption

Local communities rely on locally available products for subsistence and cash income. Based on collected information, CFUGs are collecting three types of forest products from community forest: **forest food** such as bamboo shoot, honey, ziphyu, mushroom, fisheries products and gamone plant; leaves of trees and shrubs such as Da-ni Thetke, Myat-Thetke and In leave for roofing materials; **agroforestry products** such as coffee, tea leave, ginger, potato, mango, turmeric, pine apple and sesame and forest products such as charcoal, rattan, small pole for housing and farm implements, broom and bamboo. The most common products for household consumption are bamboo, bamboo shoot and firewood as shown in the figure (2).

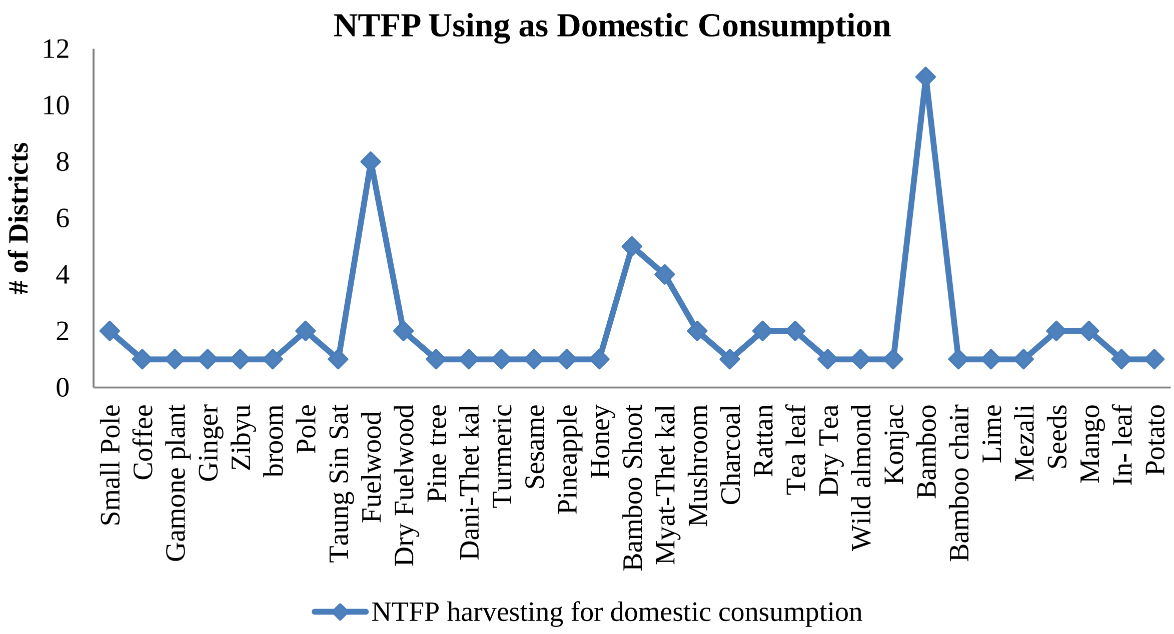

Figure 3. Household consumption products (forest products and agroforestry products)

Why household use is not easy to estimate for cash?

When we calculate the monetary value of home consumption using imputed values, the value of household use is very low compared to the total annual income getting from the sale of forest products. It is likely to be collecting forest products from outside of CF areas, uses of forest food are dwindling as people gain more access to purchased foods; the availability of NTFPs in allocated CF areas, restriction of the use of the forest products, the road access to collect the products, no information on who collects the products or on the quantity of the products derived from community forests.

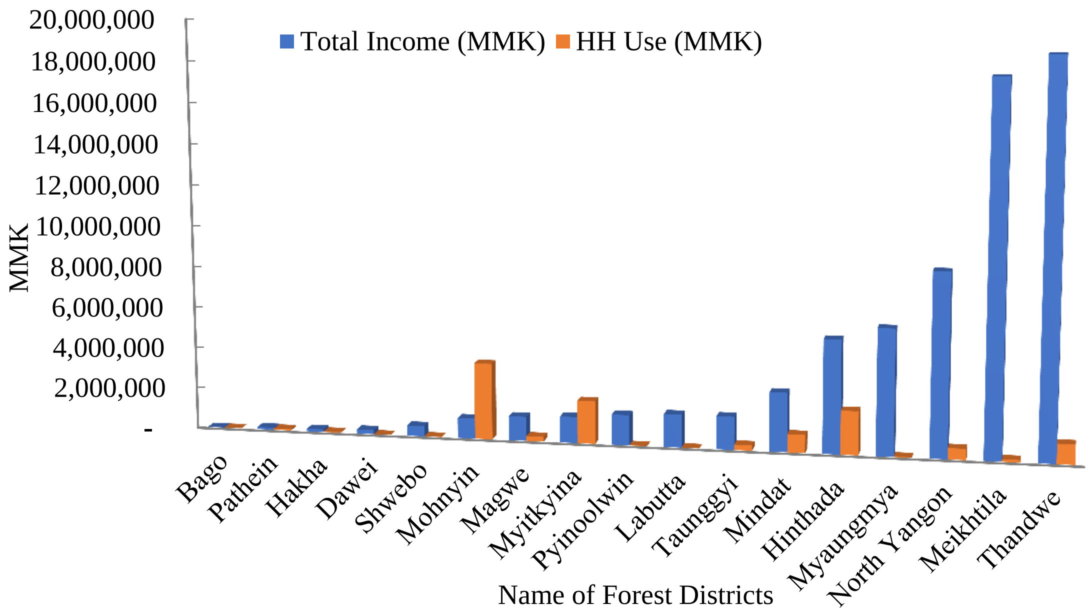

Figure 4. Total income and Household consumption in cash (MMK) of the studied districts

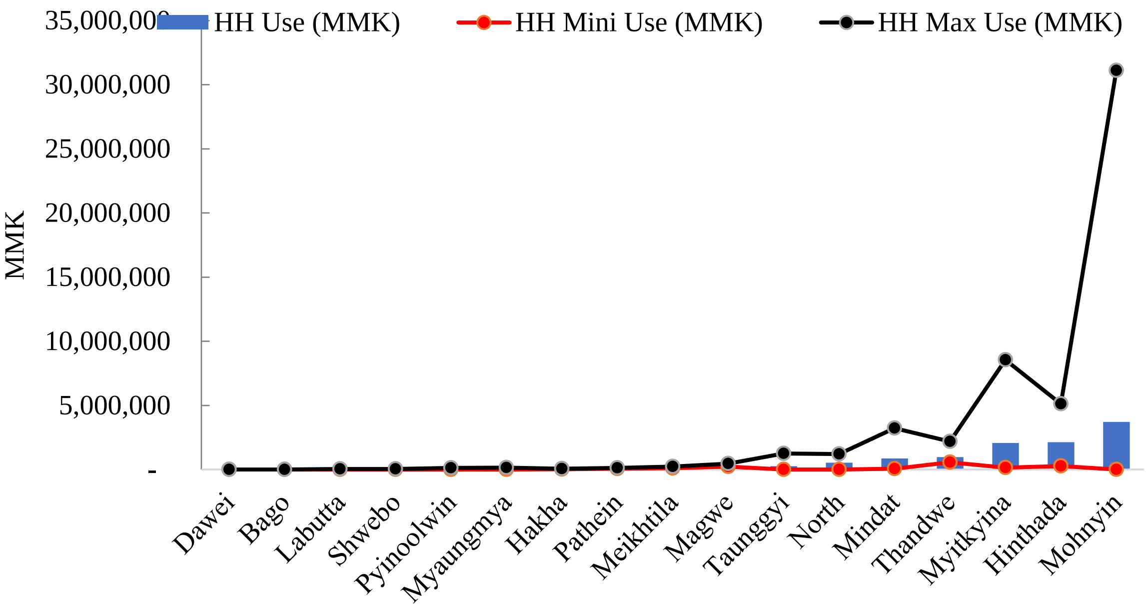

Figure 5. Average Household consumption into cash (MMK) of the studied districts

The average minimum value of home consumption in cash is 163,613 Kyats while the average maximum value is 3,107,941 kyats. Among the 17 Forest Districts, Mohnyin with 22 CFUGs and Myitkyina with 28 CFUGs has higher value of household consumption for bamboo, bamboo shoot, honey, and green firewood than selling products.

Cash value from the sale of forest products

The CFUGs get income from a variety of sources such as the sale of forest products, membership fee, donation, rewards from the Forest Department and fines. In this study, we measure only income from the sale of forest products: **agroforestry products** such as white gum, coffee, gamone plant, mango, potato, pine apple, macadamia, curcuma root, turmeric and tea leaf; **NTFPs** such as Seeds, Thetke, Firewood, Bamboo Shoot, Charcoal, Gone kha, Yahta-twe-u and Konjac. There are no forest districts that get income from selling timber. The main sources of income come from selling the seeds in Myaungmya District followed by white gum and firewood. The highest earning districts are Thandwe followed by Meikhtila, Myangaung, North Yangon, and Hinthada.

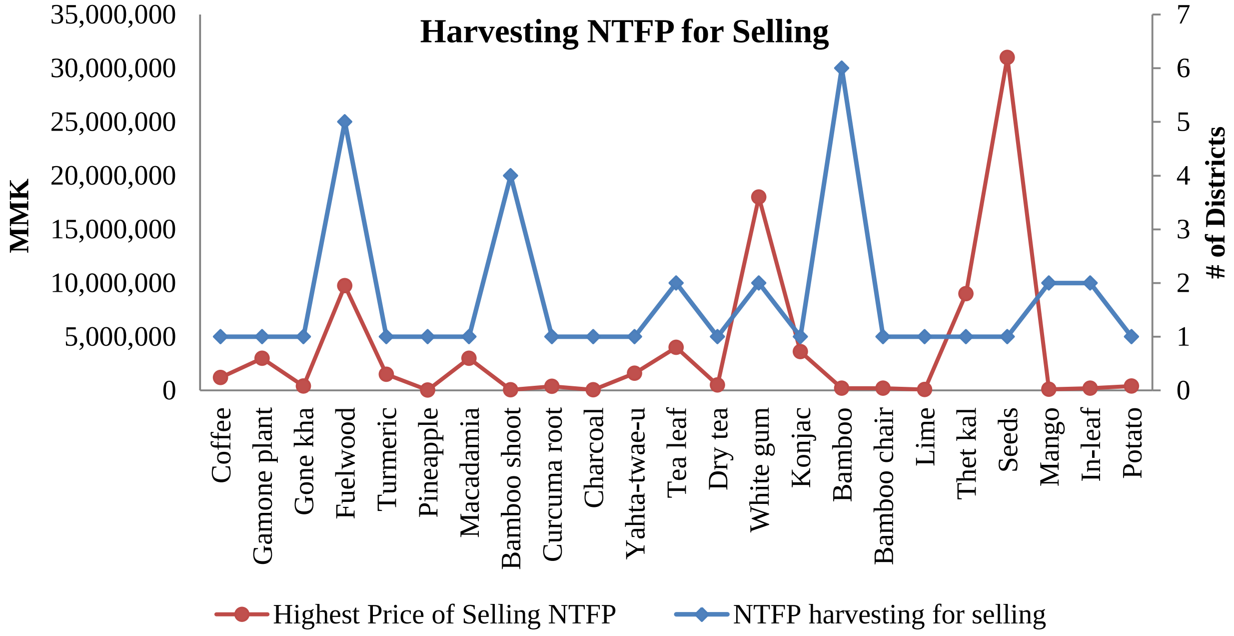

Figure 6. Different types of NTFP collected by the communities for income (MMK) of the studied districts

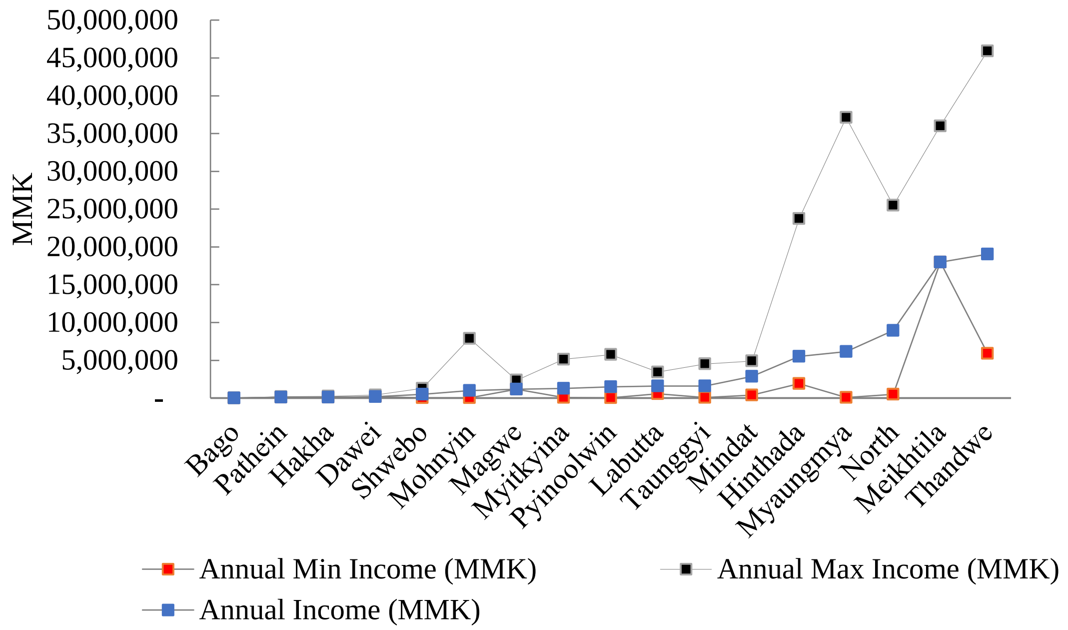

Figure 7. Average annual income (MMK) of the studied districts

The average annual income was found 4,094,105 MMK of the studied districts. 71 % of the studied districts' average annual income was found less than 20 lakh which is around the annual income from the daily wages while the average annual income which is higher than 50 lakh includes Hinthda, Myaungmya, North Yangon, Meikhtila and Tandwe. The difference between minimum and maximum income (about3, 500 Kyats) is more or less the same for Bago, Pathein, Hakha, Dawei, and Magawe Districts. There is slightly difference for Mohnyin, Myitkyina, Pyinoolwin, Laputta, Taungyi and Mindat. The variation between average minimum and maximum income is different in Hinthada, Myaungmya, North-Yangon, Meikhtial and Thandwe Districts.

Does community forest area affect household cash income?

Based on the collected information, the average CF area is the largest in Myitkyina Districts followed by Mohnyin, Taungyi, Myaungmya and Thandwe whereas North Yangon and Meikhtila Districts while the average annual income is the largest in Thandwe Districts followed by Meikhtila, North Yangon, Myaungmya and Hinthada. This shows that the average annual income is not only related to number of CF areas but also the buyers of CF products and market conditions. It was found that the sale of forest products relies on agroforestry products and NTFPs although some Districts has large natural forest area of CF. Therefore, enabling conditions should be created to get income from natural forest conservation either from selling timber or payment for ecosystem services.

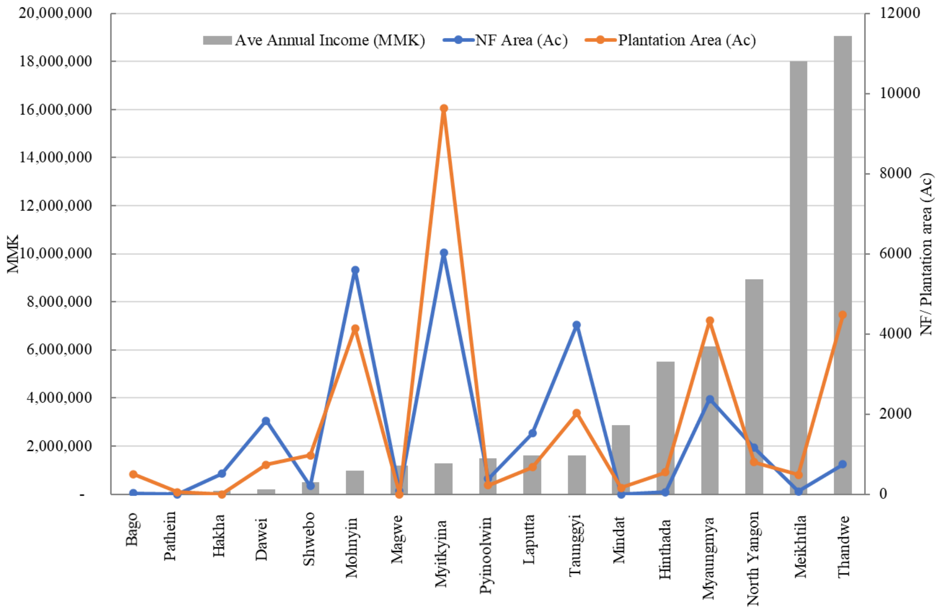

Figure 8. Showing the community forest area (Ac) and Household average annual income (MMK) of the studied districts

Relationship between cash from the sale of products and household use

The results show that 48 % of community forest user groups are producing for their own consumption and selling small surplus to local markets. 52 % of total collected cases reported no cash income from the sale of forest products, of which, benefits of 60 % of CFUGs is likely to be ecosystem services from watershed conservation. Among the 17 Forest Districts that get income, 65 % of USGs receive income as a subsistence income because they receive annual income about 2, 000,000 kyats which is equivalent to average daily wages in Myanmar. The remaining 35 % shows to reach beyond subsistence stage in terms of annual income.

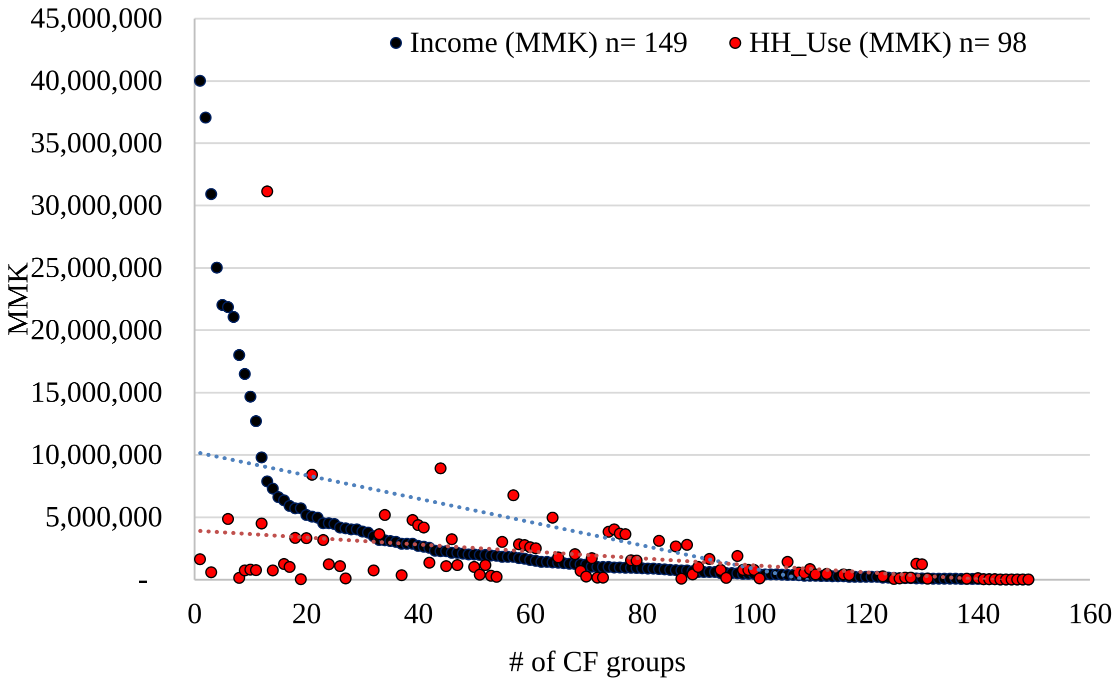

Figure 9. Annual income and Household consumption in cash of all of studied cases (N=149)

The ways for Community Forest Enterprise Development

According to this study finding through on-line survey and interviews with 15 respondents from CFUGs, the income from sale of forest products is mainly related to types of products that customer wants and market conditions either in local or urban market. The following case example shows types of products, customer and market conditions based on interview with FUGs and FD staff.

Case (1) Warkone CFUG in Myaungmya District, the customers for buying Mangrove Tree Seeds is the Forest Department to be used in Myanmar Reforestation and Rehabilitation Program-MRRP and Private Company. USG members as well as non-members collect the seeds from CF area. The seeds are collected and transported by the Chairman of CFUG.

Case (2) Yoezone CFUG in Meikhtila District for selling white gums: Some user group members sell to the brokers while some directly sell to Mandalay traders. Among the traders, some are Chinese. The average household income is about 15,000,000 kyats a year.

Case (3) CFUG in Mindat District for selling Yam, the buyers are traders from Mandalaly to export to Korea. The local traders from Mindat established a factory and collect Yam from

Case (4) Yahaine CFUG in Thandwe District for selling Ratan (Khapaung and Taung Kyein): The customer is Private Company from Yangon Industrial Zone (2). The raw materials are given treatment before marketing.

Case (5) CFUG in Myanaung District for selling In Leaf *Dipterocarpus cuberculatus*, the CFUG members collect In leaf individually and process as roofing materials. The brokers from nearby city come and pick up the products for wholesale market. The consumers are local people. CFUGs can earn about 3 to 7 lakh per household in a year depending on number of family members who can work.

Based on the above sample cases, it can be indicated that the buyers of community forest products are local consumers for local use although White Gums and Yam seemed to export China, Thailand, Korea and Japan. Even though 65 % of USGs among 17 Forest Districts are subsistence stage, there is possibility to reach early and developing stage because some CFs are selling products into local, regional and national markets. But, CFUGs that are getting higher income sell raw materials to local and urban market without any value adding process. The CF products are collected individually and collection action is rarely found. As the highest income generating CF are getting from only one products, products diversification should be considered so as to avoid market uncertainty and resource degradation.

Conclusions

The results show that 48 % of CFUGs are producing forest foods, agroforestry products and forest products for their own consumption and selling small surplus to local markets, 52 % of total collected cases have no information for cash income, of which, benefits of 60 % of CFUG is likely to be ecosystem services from watershed conservation. Among the 17 Forest Districts getting cash income, 65 % receive income as a subsistence income while remaining 35 % shows to reach beyond subsistence stage in terms of annual income from selling agroforestry products and NTFPs.

According to the ladder of CFE development, most of the sample cases are in subsistence stage, however, there is also possibility to reach early and developing stage because some CFs are selling products into local, regional and national markets. According to theory, the concepts of value-addition and social cohesion have to be promoted to level up the development stage. However, this study indicated that value-addition and social cohesion is limited in Myanmar context.

In order to level up the stages in respective states and regions of Myanmar, further assessment should be conducted including nation-wide survey on existing CFs to assess the feasibility of CFE, identification on the types of CFE, buyers of community forest products and market demand and demonstration of CFE pilot case. Local communities are not used to selling collectively for forest products unlike agricultural products. Therefore, this study supports integration of CF and farm enterprise within a single framework suggested by Tint et al (2014).

Depending on the cases, family-led enterprise should also consider to encourage like in Thailand case. Long-term technical, financial and social support either from civil society organization or private sector is necessary. To strengthen mutual partnership between private sector and local community, further study would be carried out. This study shows that CFUGs are getting higher income from selling agroforestry products such as white gum and yam so that the Forest Department should continue establishing agroforestry in CF areas.

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