

Data collection of the baseline of the EU- Guyana VPA Impact monitoring framework (ARB-2024-0443 –EU FLEGT VPA PROGRAMME)

Final report – August 2025



Table of Contents

A.Executive summary.....	7
B.Background and objectives of the consultancy.....	9
C.Methodological framework	11
C.1.Impact Monitoring Framework	11
C.2.Overview of the methodological approach	13
C.3.Secondary sources of information	16
C.3.1.Information gathering and classification	16
C.3.2.Secondary source transcription, analysis, and documentation	17
C.4.Primary sources of information	18
C.4.1.Field interviews (FSOs and forest stations)	18
C.4.2.Focus groups with FSOs	19
C.4.3.Final workshop with NIWG	19
C.4.4.Capacity building session.....	20
C.5.Overview of data analysis	21
C.6.Indicators without baseline values.....	23
D.Methodological outputs of the Baseline study	24
D.1.Data sources cross checking and discrepancies.....	24
D.1.1.Number of concessions, processing actors and traders	24
D.1.2.Employment metrics	27
D.1.3.Production, and trade metrics	29
D.2.Baseline study data gaps	30
D.2.1.FSOs inspections	30
D.2.2.Timber custody, seizing and forfeiture.....	31
D.2.3.NIS and GRA registers	31
D.2.4.FSOs trainings	32
D.2.5.Grievances mechanisms	32
D.2.6.Private investments metrics.....	33
D.2.7.Gender and ethnicity	34
D.3.Designed methodologies	35
D.3.1.Methodological sheets.....	35
D.3.2.FSOs typologies	36
D.3.3.Transparency assessment.....	37
D.3.4.Geographical considerations	43
E.Recommendations for future rounds.....	44
E.1.Secondary information collection optimization.....	44
E.2.Timeline of impact monitoring.....	44
E.3.Statistical samples	45
F.Conclusion	46



Table of tables

[TABLE 1. LIST OF IMPACT AREAS, SUB-IMPACT AREAS AND INDICATORS OF THE VPA IMPACT MONITORING FRAMEWORK](#).....9

[TABLE 2. INDICATORS CRITICAL DATA GAPS AND NIWG ORIENTATIONS](#)..... 19

[TABLE 3. FSOS NUMBERS COMPARISONS ACCORDING TO THREE AVAILABLE SECONDARY SOURCES](#)...21

[TABLE 4. DATA SOURCE COMPARISON FOR EMPLOYMENT METRICS IN THE FOREST SECTOR](#)24

[TABLE 5. FSOS BASELINE CATEGORIES DESCRIPTIONS](#)32

[TABLE 6. EXTRACT FROM TRANSPARENCY ANALYSIS TOOL CREATED FOR IMPACT AREA 2.1.](#)35

[TABLE 7. EXAMPLE OF FSOS BREAKDOWN FOR A STATISTICALLY REPRESENTATIVE SAMPLE](#)40

Table of figures

[FIGURE 1. VPA THEORY OF CHANGE WITH IMF DESIGN CONSULTANCY ADDITIONS](#).....8

[FIGURE 2. OVERVIEW OF BASELINE STUDY DATA COLLECTION METHODOLOGY](#) 12

[FIGURE 3. INTERVIEWED FSOS SAMPLE CHARACTERISTICS](#) 15

[FIGURE 4. NIWG VALIDATION WORKSHOP PICTURE](#)..... 17

[FIGURE 5. CAPACITY BUILDING SESSION PICTURE](#)..... 17

[FIGURE 6. GLOBAL OVERVIEW OF INDICATORS ANALYSIS](#) 18

[FIGURE 7. TRENDS ON DOWNSTREAM LICENCE CATEGORIES NUMBER FROM 2011 TO 2018](#)..... 22

[FIGURE 8. TRENDS ON AGGREGATED LICENCES DELIVERED TO VPA FSO TYPES FROM 2011 TO 2018](#)..22

[FIGURE 9. GRAPHICAL REPRESENTATION OF FSOS CATEGORIES POSITIONS WITHIN TECHNIFICATION AND MARKET](#) 33

[FIGURE 10. GEOGRAPHICAL BREAKDOWN OF TIMBER AND TIMBER PRODUCTS \(GFC FSIR, 2018\)](#) 38

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The analyses, interpretations, and recommendations expressed are solely those of the authors and do not necessarily reflect the official views of the partner institutions.



List of abbreviations

Acronym	Meaning
AFD	French Development Agency
APA	Amerindian People Association
AWU	Annual Work Unit
BoS	Bureau of Statistics
CFMA	Community Forest Management Agreement
EFITAP	European Forest Institute Technical Assistance Project
EITI	Extractive Industries Transparency Initiative
EU	European Union
FCA	Forest Concession Agreement
FLEGT	Forest Law Enforcement, Governance and Trade
FMD	Forest Monitoring Division
FPA	Forest Producers Association
FPIC	Free Prior and Informed Consent
FSIR	Forest Sector Information Report
FSO	Forest Sector Operators
FTCI	Forestry Training Centre Inc.
GEITI	Guyana Extractive Industries Transparency Initiative
GFC	Guyana Forestry Commission
GGMC	Guyana Geology and Mines Commission
GL&SC	Guyana Lands and Surveys Commission
GMSA	Guyana Manufacturing and Services Association
GRA	Guyana Revenue Authority
GTLAS	Guyana Timber Legality Assurance System
GYD	Guyanese Dollar
IFM	Independent Forest Monitoring
IICA	Inter-American Institute for Cooperation on Agriculture



ILO	International Labour Organization
IMF	Impact Monitoring Framework
ITTO	International Tropical Timber Organization
JIF	Joint Implementation Framework
JMRC	Joint Monitoring and Review Committee
LC	Large Concessions
LCDS	Low Carbon Development Strategy
LFS	Labour Force Survey
MoF	Ministry of Finance
MoL	Ministry of Labour
MRVS	Measurement, Reporting, and Verification System
NIS	National Insurance Scheme
NIWG	National Implementation Working Group
NGO	Non-Governmental Organization
NTC	National Toshaos Council
NTWG	National Technical Working Group
OSH	Occupational Safety and Health
PAYE	Pay As You Earn
PPE	Personal Protective Equipment
SFA	State Forest Authorizations
SFEP	State Forest Exploratory Permit
SFM	Sustainable Forest Management
SFP	State Forest Permission
SLP	Small Logging Permit
SPWP	Secondary Processed Wood Products
TLAS	Timber Legality Assurance Systems
ToC	Theory of Change
ToR	Terms of Reference



TSA	Timber Sales Agreement
UNFCCC	United Nations Framework Convention on Climate Change
VAT	Value-Added Tax
VC	Village Council
VPA	Voluntary Partnership Agreement
WCL	Wood Cutting Lease
WWF	World Wildlife Fund



A. Executive summary

This report presents the methodological outputs, considerations and recommendations of the baseline study for the EU–Guyana Voluntary Partnership Agreement (VPA) Impact Monitoring Framework (IMF), conducted under the EU-FLEGT VPA Programme (contract ARB-2024-0443). The consultancy implements *Strategic Task 5.1.2* of the *Guyana–EU Joint Implementation Framework*, establishing the first integrated baseline dataset for the VPA IMF, and following the 2023 design phase of the IMF. The baseline is intended to: (i) support decision-making within Guyanese institutions, (ii) foster transparency and trust among stakeholders, (iii) ensure compatibility with national reporting systems, (iv) be cost effective and transferable to national actors.

The study applied a mixed-methods approach combining:

- **Secondary data review** from national and international sources (e.g., GFC FSIR, ITTO, Bureau of Statistics).
- **Primary data collection** via field interviews with 17 Forest Sector Operators (FSOs), 3 forest stations, and focus groups with 9 industry actors.
- **Stakeholder engagement** through workshops with the National Implementation Working Group (NIWG) and a GFC-led capacity-building session.

Data was collected for 2018 (start of the VPA agreement) and earlier years to establish trends. The 46 impact indicators and 5 basis data indicators were categorized as:

- Verified by secondary data (41%).
- Estimated via proxies or based on primary data (49%).
- Without baseline value due to data unavailability (10%).

Key methodological findings:

- **Baseline Gaps:** 5 indicators lacked any data, including volumes of seized/forfeited timber, conservation area integrity, and foreign investment volumes. The NIWG recommended retaining them for future monitoring.
- **Data Discrepancies:** inconsistencies were found between national datasets (FSIR, EITI) and between FSIR and ITTO trade data, stemming from differences in definitions, purposes, and reporting cycles.
- **Sector Coverage Limits:** GFC licensing data does not capture unlicensed downstream actors (e.g., furniture producers), and vertical or horizontal integration of forest value chain activities by FSOs, masking important parts of the value chain.
- **Governance & Transparency:** Some indicators—especially related to inspections, OSH training, and grievances—are hindered by fragmented or inaccessible records despite existing databases.
- **Environmental Monitoring:** MRVS provides solid data on forest cover and deforestation, but there are no conservation areas monitoring systems within large concessions.
- **Investment Tracking:** No systematic data exists on sector investments, particularly from international financing; operator estimates are illustrative only.

Recommendations for future monitoring rounds:

- **Institutionalize data-sharing** through formal MoUs between GFC, Bureau of Statistics, NIS, GRA, EPA, and others.
- **Maintain trend-based analysis** rather than one-off figures for consistency and relevance.
- Create a **centralized VPA data system** to store and manage all monitoring information.
- **Retain key indicators without current data** to drive institutional capacity building and transparency improvements.
- **Improve coverage of informal sector actors** via complementary sources (e.g., GRA records, dedicated surveys).



- **Balance confidentiality and transparency** by anonymizing sensitive enforcement and grievance data.
- **Align monitoring cycles with major VPA milestones** to ensure policy relevance.

The baseline establishes the first structured reference dataset for the EU–Guyana VPA, highlighting both strengths—such as MRVS forest cover data and existing FSIR production statistics—and significant gaps in employment, enforcement, investment, and grievance records. It underscores the VPA’s potential to strengthen forest governance, but achieving this will require systematic improvements in data access, inter-agency coordination, and inclusion of currently invisible parts of the forest sector.



B. Background and objectives of the consultancy

This consultancy is part of the EU-FLEGT VPA Programme, which supports the implementation of the VPA between the European Union and Guyana, signed in 2022 and entered into force in June 2023. The VPA aims to promote legal timber trade, strengthen forest governance, and ensure the inclusion of all stakeholders in the forest sector. Within this framework, the consultancy contributes to *Strategic Task 5* of the Guyana-EU Joint Implementation Framework, specifically *activity 5.1.2: the development of a VPA impact monitoring baseline*. The assignment's core objective is to establish a robust and contextualized baseline for tracking the social, economic, environmental, and governance impacts of the VPA. This includes reviewing and analysing secondary datasets, conducting primary field data collection, and engaging with stakeholders through workshops and interviews. The results feed into an integrated impact monitoring system, enhance transparency and accountability in the VPA process, and inform future monitoring rounds with technical recommendations and methodological improvements.

The IMF was designed with three objectives: (i) to **support decision-making within Guyanese public institutions**; (ii) to **promote transparency, trust, and information-sharing** among VPA stakeholders, including civil society, NGOs, the private sector, and academia; and (iii) to **generate inputs compatible with other national reporting systems**. The IMF was also conceived as a **practical and cost-effective system**, with a clear intention to **transfer responsibility for its implementation to Guyanese institutions**.

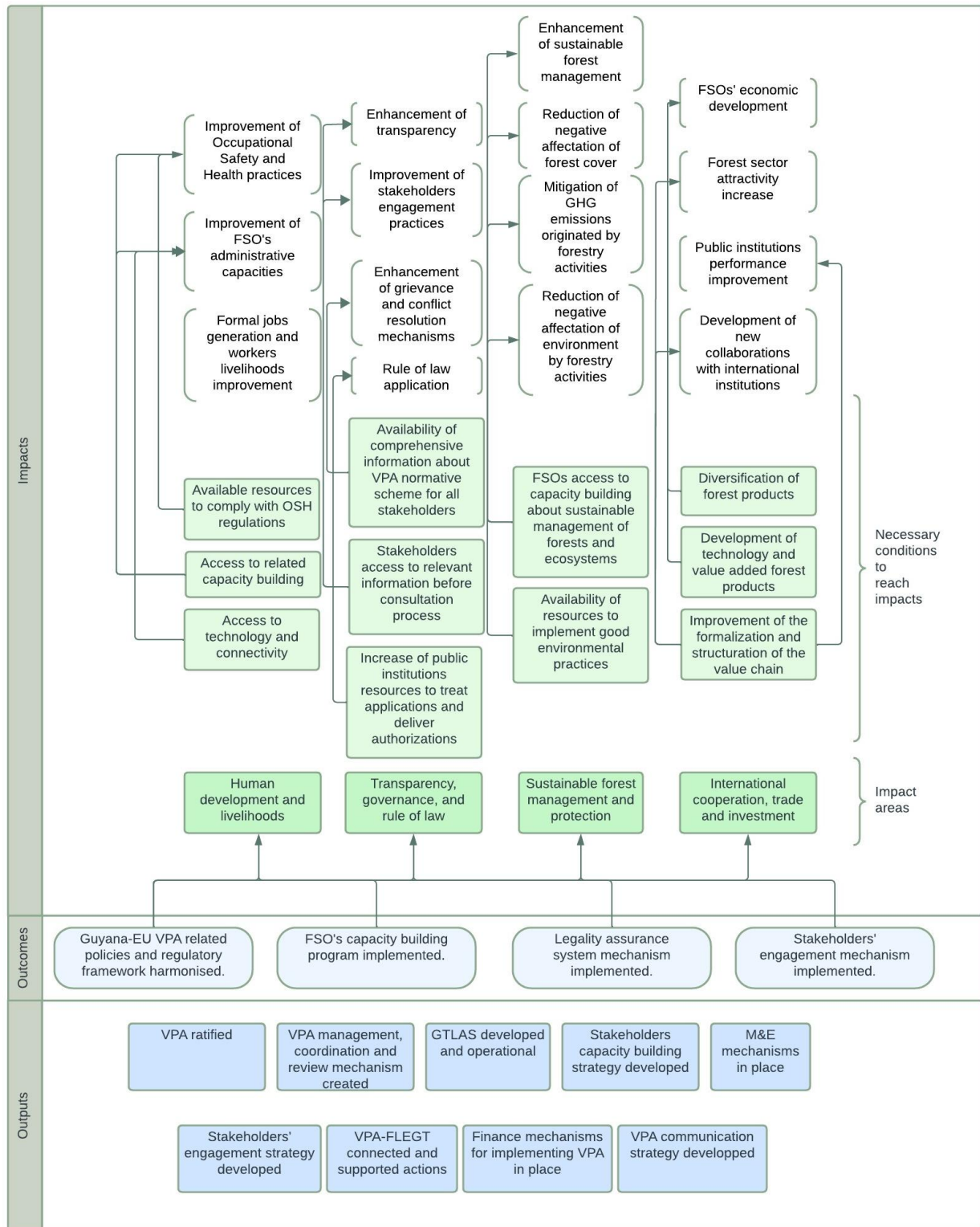
This consultancy follows a first phase completed in 2023, which focused on designing the VPA Impact Monitoring Framework (IMF). That phase, led by Tero and carried out in close collaboration with the National Implementation Working Group (NIWG), was grounded in a participatory process involving public institutions, Indigenous and forest sector stakeholders, and civil society actors.

An operational working group constituted by NIWG members was proposed to work more specifically on key technical aspects, including the definition of indicators and impact areas, and assessment of existing data sources and their reliability. One of the key conclusions from the IMF design phase was the importance of grounding it in existing concepts and previous work realized under the VPA, in particular the Theory of Change (ToC) developed as part of the Joint Implementation Framework (JIF). In alignment with this principle, the IMF followed the structure and logic of the JIF's ToC, especially with regard to the definition of impact areas and the organization of the indicators system. The design of workshops and technical working sessions with VPA stakeholders was thus guided by the impact areas outlined in the ToC, with a specific focus on identifying relevant sub-impact areas, associated indicators, and practical strategies for data management and verification.

The JIF ToC is structured in two parts: the upper section identifies the desired long-term changes and impacts of the VPA, while the lower section defines the intermediate outcome areas—referred to as “Strategic Tasks”—where targeted actions are required to achieve the overall objective. To better reflect the priorities and recommendations raised by NIWG members, the IMF design consultancy constructed a complementary version of the ToC's upper section. This adapted version integrates the practical concerns and expectations of stakeholders regarding the monitoring of key impacts and the operationalization of the framework.



FIGURE 1. VPA THEORY OF CHANGE WITH IMF DESIGN CONSULTANCY ADDITIONS



The resulting IMF introduced a three-level structure aimed at balancing practicality and comprehensiveness: it includes 4 main impact areas (aligned with the ToC developed under the JIF), 14



sub-impact areas reflecting the key expected outcomes of the VPA implementation, and 46 indicators (quantitative and qualitative) to objectively capture change over time. It also defined a “basis dataset” (i.e. statistical universe) of 5 indicators to support the impact analysis.

The present consultancy therefore operationalizes the IMF by establishing the first reference dataset for the year 2018. Its scope includes the technical validation and refinement of tools, field testing of selected indicators, and triangulation of primary and secondary data. Particular attention is given to identifying and analysing inconsistencies across data sources, and ensuring the practicality, cost-efficiency, and sustainability of the monitoring system. The findings and technical recommendations will guide future monitoring rounds and strengthen Guyana’s capacity for evidence-based forest governance.

This final consultancy report presents methodological outputs, findings and recommendations and is intended for national and international decision-makers involved in the implementation, governance, and oversight of the EU-Guyana VPA. At the national level, it targets public institutions such as the Ministry of Natural Resources, the Guyana Forestry Commission, the Guyana Bureau of Statistics, and members of the NIWG, who are key actors in shaping forest policy, managing data systems, and coordinating implementation efforts. At the international level, it is aimed at EU institutions, AFD (French Development Agency), and technical and financial stakeholders supporting the VPA process. The report is accompanied by a baseline study, which presents the technical findings of the first data collection round and offers a sectoral analysis of the selected impact areas. The baseline study is designed to be made public, in line with the transparency principles of the VPA, to foster stakeholder engagement, inform the wider public, and support evidence-based dialogue across the forest sector. Together, the report and baseline study provide a foundation for ongoing monitoring and evaluation, guide future rounds of data collection, and contribute to the institutionalization of an open, credible impact monitoring system.

C. Methodological framework

C.1. Impact Monitoring Framework

In the context of the VPA Impact Monitoring Framework, the term “*impacts*” refers to measurable and observable changes—either positive or negative—within Guyana’s forest sector that can be reasonably linked to the implementation of the VPA. These impacts may manifest in various dimensions, including economic performance, forest governance, environmental conditions, social dynamics, and stakeholder capacities. Unlike the immediate outputs of VPA-related activities, impacts are typically medium- to long-term outcomes that reflect broader systemic shifts. Examples include enhanced market access, improved legal compliance, strengthened livelihoods, or evolving forest management practices.

To capture these changes, the IMF is organized around four impact areas. Each area is further broken down into sub-impact areas and associated indicators. These are detailed in the table below.

TABLE 1. LIST OF IMPACT AREAS, SUB-IMPACT AREAS AND INDICATORS OF THE VPA IMPACT MONITORING FRAMEWORK

1. Basis data	
0.1 Map of forest concessions allocation of Guyana	
0.2. Number and areas of large concessions, Small Concessions, Community Forestry Associations, Private Lands, State Land in conversion and Amerindian villages.	
0.3. Number of sawmills, lumber yards, processing companies and import-export companies	
0.4. Total number of forest workers	
0.5. Number of annual FSO’s inspections	
1. Human development and livelihoods	
Sub-impact areas	Indicators
1.1. Occupation Safety and Health	1.1.1. Number and % of inspected FSOs about OSH practices compliance



	1.1.2. Number and % of FSOs complying with public health minimum standards
	1.1.3. Number and % of trained workers on OSH practices
	1.1.4. Number and rate of occupational accident and injuries in the forest sector
1.2. FSO's administrative capacities	1.2.1. Volume of forest products in custody
	1.2.2. Number and % of trained workers about record keeping
	1.2.3. Number and % of FSOs meeting administrative obligations
1.3. Formal jobs generation and workers livelihoods	1.3.1. Number and % of formal jobs
	1.3.2. Number and % of FSOs contributing to the P.A.Y.E. and NIS.
	1.3.3. Number and % of permanent positions
	1.3.4. Number and % of forest workers relying on forest activities for their livelihoods
	1.3.5. Income level of forestry workers
2. Transparency, governance and rule of law	
Sub-impact areas	Indicators
2.1. Transparency	2.1.1. Description of information sharing activities and processes implemented and compliance with VPA – Annex IX
	2.1.2. Number % of Forest stakeholders effectively accessing the information disclosed
2.2. Meaningful stakeholders' engagement	2.2.1. Description of implemented stakeholders' engagement processes (topics, methodologies, level of expected engagement of stakeholders, stakeholders actual involvement in decision making etc.)
	2.2.2. Number of participants and represented entities to engagement processes
	2.2.3. Level of VPA stakeholders' satisfaction with the engagement processes
2.3. Grievance and conflict resolution mechanisms	2.3.1. Methods implemented to listen and respond to complaints linked to the VPA implementation
	2.3.2. Number of formally registered grievances linked to the VPA implementation
	2.3.3. % of resolved grievances linked to the VPA implementation
	2.3.4. Average resolution timeline (in number of days) of grievances and disputes treated through the VPA complaint mechanism
2.4. Rule of law	2.4.1. Number and % of compliant FSOs with legality definition principles and criteria
	2.4.2. Number and % of inspected FSOs about legality definition principles and criteria
	2.4.3. Number and % of trained FSOs about legality definition
	2.4.4. Description of the FSOs perceptions on the legality matrix compliance.
3. Sustainable management and protection of forest and ecosystems	
Sub-impact areas	Indicators
3.1. Sustainable management of forest	3.1.1. Volume of seized and forfeited timber and forest products
	3.1.2. Number and % of FSOs with reported breaches related to sustainable management of forest



	3.1.3. Volume of annual production from logging activities compared to annual total allowable cut volume
	3.1.4. Area and % of conservation areas of Large Concessions remaining intact
3.2. Forest cover changes and GHG emissions	3.2.1. Deforestation area caused by Forestry Infrastructure construction
	3.2.2. Carbon emissions due to forest degradation and deforestation driven by forestry activities (logging, skid trail, and infrastructure construction)
3.3. Environment, biodiversity and ecosystems	3.3.1. Number and types of alerts and complaints about pollution on land, water, noise, and air originated by FSOs
4. International cooperation, trade, and investment	
Sub-impact areas	Indicators
4.1. FSOs economic development	4.1.1. Total and average amount of capital investment by FSOs
	4.1.2. Number of FSOs accessing financial services (forestry revolving fund from Demerara Bank, others)
	4.1.3. Volume of traded forest products with a focus on traded timber species distribution and value-added forest products
	4.1.4. Value of FSOs (labour and/or capital) productivity
	4.1.5. Number and % of FSOs going inactive
4.2. Forest sector attractiveness	4.2.1. Number and origins of applications to access concessions in Guyana
	4.2.2. Volume and list of foreign investments in Guyanese forestry sector
	4.2.3. Volume and total value of exported wood and articles of wood, compliant with international phytosanitary standards
	4.2.4. Forest sector GDP and description of its drivers
4.3. Public institutions performance	4.3.1. Public revenues generated by the forest sector
	4.3.2. Public investment in forest sector and in GTLAS agencies
	4.3.3. Number of staff in relevant public entities (GFC, EPA) dedicated to promoting and verifying legal compliance
	4.3.4. Number of days to obtain authorizations and licensing from relevant public entities (GFC and EPA)
4.4. Collaboration with international institutions	4.4.1. Description of how the VPA creates a pathway for accessing new markets and new international collaboration agreements

C.2. Overview of the methodological approach

To ensure the reliability of the baseline analysis, data was collected not only for the year 2018—the reference year of the study—but also for earlier periods where available. This approach allowed the team to **observe trends over time**, rather than relying on isolated figures. Identifying trends is often more meaningful than reporting a single number, especially when data availability is uneven, when the reliability of data quality remains uncertain or when the forest sector is highly dynamic. For example, the exact number of active FSOs in any given year may vary due to administrative delays, permit inactivity, or informal operations; therefore, understanding how these figures evolved over several years provides a stronger foundation for assessing impacts. One key recommendation for future rounds of VPA Impact Monitoring is to **maintain this trend-based approach** to improve consistency and relevance. It is also important to note that while the period leading up to 2018 may serve as a baseline for several indicators, the actual implementation of FLEGT licensing is only expected to begin in 2025 or 2026. As a result, changes observed between 2018 and the start of licensing may reflect broader forest sector dynamics such as



market fluctuations, investment cycles, or national policy shifts. This will be very important to monitor precisely in the future.

Our initial approach prioritized the **use of secondary datasets**—both national and international databases and reports—to ground our analysis in existing monitoring tools available in Guyana and to keep the costs of impact monitoring as low as possible. All secondary sources were reviewed systematically, assessing their reliability, frequency, geographic scope, and data type. The most credible and relevant sources were selected per indicator, and complementary materials were used for triangulation. In cases where **discrepancies** were found between different secondary data sources¹, we engaged directly with the institutions responsible for producing or analyzing those datasets to understand the inconsistencies and **identify the most relevant reference source** for the VPA impact monitoring. In several cases, secondary data did not provide the exact values required by the indicators but allowed us to either make **informed estimations or use proxies** to assign meaningful values.

Indicators that lacked available values from secondary sources² were addressed through **primary data collection**, including **interviews with FSOs, regional forest station visits, and focus groups in Georgetown** (activities described in the following section). Additionally, for some indicators displaying **important peaks or drops in trends**, we carried out bilateral meetings and focus groups with FSOs and institutions to confront these anomalies with on-the-ground experience, facilitating **participatory consensus validations**.

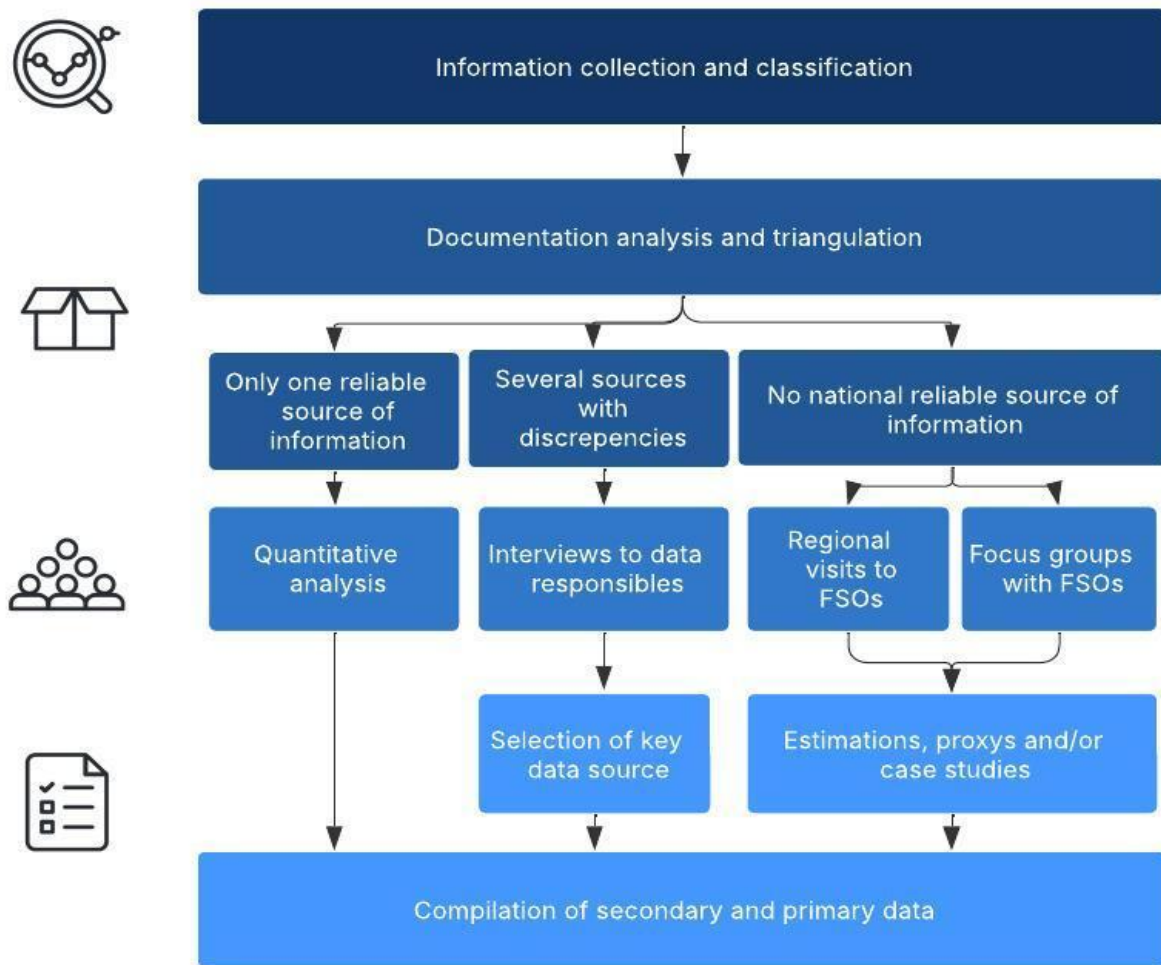
The following figure illustrates how different levels of data quality were handled through a structured process: from direct quantitative analysis when a reliable source was available, to interviews and triangulation in cases of conflicting information, and finally to field-based data collection when no reliable source existed. The approach integrates both top-down (institutional) and bottom-up (FSO-level) perspectives, ensuring that findings are grounded in both official records and field realities. This methodological structure not only supports credibility and adaptability but also offers a replicable model for future rounds of VPA impact monitoring.

¹ For the baseline study specifically, whenever multiple sources existed for a single indicator, they often presented notable discrepancies in figures or definitions.

² Despite several formal data requests, information from agencies such as GFC, NIS, and GRA remained inaccessible.



FIGURE 2. OVERVIEW OF BASELINE STUDY DATA COLLECTION METHODOLOGY



As part of Phase 3 of this consultancy, a national workshop was held with members of the NIWG to present preliminary findings from the baseline data collection and to gather feedbacks on the results, methodological approach, and proposed adjustments for future monitoring rounds. This participatory exchange helped validate key insights and ensured alignment with stakeholder priorities. In addition, a dedicated capacity-building session was conducted with technical staff from the Guyana Forestry Commission—specifically from the Forest Monitoring Division (FMD), Forest Resources Management Division (FRMD), and FLEGT Secretariat—as well as representatives from the Inter-American Institute for Cooperation on Agriculture (IICA). This session focused on strengthening institutional understanding of the VPA Impact Monitoring Framework, sharing tools and protocols developed during the consultancy, and supporting the long-term transfer of responsibilities for monitoring implementation to national actors.



C.3.Secondary sources of information

The methodology used to develop the baseline study followed a structured and iterative approach, aimed at ensuring that information collected was comprehensive, systematically classified, and critically analysed. The process was designed to meet both the technical requirements of the baseline study and the broader objective of establishing a credible and transparent foundation for future rounds of VPA impact monitoring. The key steps of the methodological approach for secondary sources treatment are outlined below.

C.3.1.Information gathering and classification

The first stage consisted of collecting and organizing secondary data in a centralized shared folder. This information gathering was guided by the list of sources outlined in the Terms of Reference (ToR) and further refined during the inception phase. To improve the accuracy of indicator assessments and allow for trend analysis, data were collected not only for the baseline year but also for earlier periods where possible.

According to the initial assumptions outlined in the ToR, the secondary data collection was expected to occur entirely during Phases 1 and 2, based on the understanding that the GFC would have gathered and precompiled relevant data in advance. However, this was not the case. Many key datasets remained unavailable or inaccessible at the start of Phase 2, requiring the consulting team to extend the timeframe of this phase to pursue additional data collection activities. As a result, portions of the secondary data collection had to be conducted also during Phases 3 and 4 of the consultancy.

An initial coordination meeting with the GFC (FLEGT Secretariat) took place in November 2024. During this meeting, a preliminary list of requested documents was shared, and several key principles were agreed upon:

- To ensure data authenticity and traceability, all data requests would be formalized through a letter of introduction issued by the GFC and followed by written exchanges with stakeholders.
- The GFC would provide a signed version of this letter, after which Tero's team would initiate formal requests to relevant institutions. The GFC actually initiated some formal requests within GFC divisions, and the letter was finally signed by the European Union Delegation.
- GFC clarified that raw data could not be shared with external consultants.

The field mission conducted during Phase 3 provided an opportunity to meet in person with monitoring system officers and technical staff from key institutions. These exchanges enabled access to previously unavailable or unpublished data, which proved critical for the completion of several indicators. In Phase 4, and particularly during the capacity-building session held with GFC teams from the Forest Monitoring Division and the Forest Resources Management Division, additional gaps in baseline data were addressed, and complementary information was shared directly with the consultancy team.

In *Annex 3* of the baseline study, the metadata table lists every secondary source of information found (used or not for the baseline study) and present essential metadata such as:

- Source organization (e.g., GFC, TERE, Tero)
- Format (e.g., PDF, QGIS, Excel)
- Temporal and geographic scales
- Data sensitivity and accessibility

This list reflects a wide range of secondary data sources and helped ensure traceability and consistency during the baseline analysis. The GFC emerges as the primary source of secondary data. However, access to certain datasets from GFC was marked as:

- Medium or difficult in terms of accessibility,
- Confidential in terms of licensing or sensitivity (e.g., internal maps, enforcement data).

Other international and national data providers like ITTO, ILO, Bureau of Statistics, and REDD+ Secretariat (GFC) also notably contributed with secondary data.



C.3.2. Secondary source transcription, analysis, and documentation

The majority of documents were found in static formats such as PDFs, with limited access to structured datasets (e.g., Excel, raw data). This limited the depth of analysis—particularly for time-series evaluations or disaggregated calculations—and significantly increased the time required for information transcription. In many cases, data had to be manually extracted and reformatted from published reports or official documents to create usable, analyzable datasets. For example, tables from Forest Sector Information Reports (FSIRs) were systematically transcribed into Excel format to facilitate indicator calculation and cross-checking (as presented in *Annex 5* of this report). Similarly, spatial data—such as the national allocation map—were reproduced in QGIS format to approximate the number, distribution, and area of concessions, compensating for the lack of accessible geospatial datasets. However, these maps often lacked associated attribute tables or metadata detailing the classification systems used. Despite these limitations, the team's effort to digitize and organize information into structured formats contributed to building a reliable foundation for the baseline and future monitoring exercises.

All transcribed secondary information used for this baseline analysis is compiled in *Annex 5* of this report. This annex brings together the various datasets collected from different sources into a single, integrated file. The objective is to provide a consolidated and structured reference document that can support future rounds of VPA impact monitoring. By harmonizing the available data in one place, this compilation facilitates easier verification, updates, and comparisons over time, thereby contributing to the sustainability and operational efficiency of the Impact Monitoring Framework.

After the initial classification, **key sources** were identified for each indicator based on their quality, completeness, and relevance. In parallel, complementary data sources were selected for triangulation purposes to ensure a more robust validation of trends. In many cases, several different sources were found for the same indicator. Our strategy consisted in systematically comparing these sources—analysing their methodologies, temporal coverage, and geographic scale—in order to assess their consistency and reliability. This process enabled the team to designate a "key data source" for each indicator, which serves as the main reference for the current baseline and is intended to guide future rounds of impact monitoring. These reference sources are explicitly indicated in the first column of *Annex 3* of the baseline study (Metadata), allowing for transparency and continuity in data use and validation.

In several cases, this comparative approach revealed **discrepancies between sources** that reported different values or classifications for the same indicator. These inconsistencies were investigated through targeted interviews with the technical teams responsible for data collection and analysis during phase 3 and 4 of this assignment, in order to better understand the reasons behind the differences—whether related to definitions, methods, timeframes, or reporting formats. Meetings involved technical teams from the GFC, the FTIC, the EPA, the IICA, the World Wide Fund for Nature (WWF), the Amerindian Peoples Association (APA) and Bureau of Statistics. These discussions provided valuable insights into the methodologies used to track employment, production and trade, forest management, environmental incidents, and impact assessments. The findings from this work on data discrepancies are detailed in the following section of this report. Despite formal written requests and follow-up communications, we were unable to secure meetings with several key national institutions during the field mission. These include Go-Invest, the Guyana Revenue Authority (GRA), the National Insurance Scheme (NIS), and the National Toshihos Council (NTC). While some of these entities acknowledged receipt of our requests, no meeting could be arranged within the mission timeframe.

In some cases, secondary information was available but did not directly provide a usable value for the corresponding VPA IMF indicator. For such situations, the team developed estimation or mediation methodologies to derive approximate indicator values, based on partial data, proxies, or assumptions aligned with international practices and the Guyanese context. These specific cases, along with the methodologies applied, are detailed in the section below. In other instances, no available secondary source contained sufficient information—either quantitative or qualitative—to estimate the indicator value reliably. In those cases, we opted to rely on primary data collection, as described in the following sections of this report.



C.4. Primary sources of information

C.4.1. Field interviews (FSOs and forest stations)

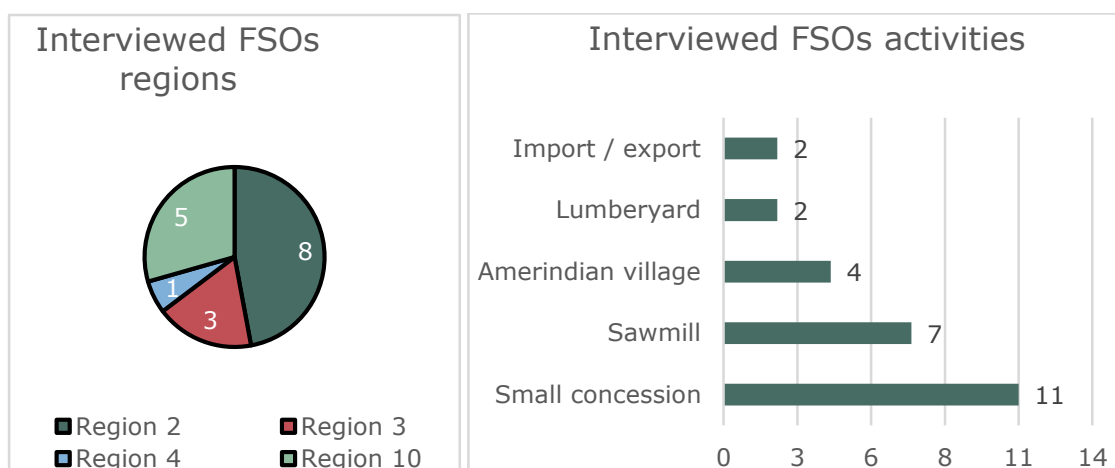
During phase 3, a series of field visits were carried out across several regions including Anna Regina, Supenaam, Parika, Soesdyke, Linden, Ituni, and Kwakwani. These visits were designed to engage directly with FSOs and forest stations in order to collect complementary field-level data, particularly for indicators where national datasets were missing or inaccessible. In advance of the visits, the GFC contacted selected FSOs by email to inform them of the purpose of the mission and request their participation in an interview³.

Over the course of five days, the team was able to meet with a total of **17 FSOs** (including Amerindian community operators, small concession holders, sawmills, lumberyards, and exporters) and **3 Forest stations**⁴.

Being accompanied by the GFC during the regional interviews proved to be a significant advantage, as their presence served as a door opener that facilitated access to licensed FSOs. To maximize coverage, we split into two teams; however, it became evident that the team conducting visits without GFC representatives faced considerable challenges, as several FSOs declined to participate or were unavailable. **While the GFC's involvement was essential in securing interviews, it also introduced a notable selection bias: we were only able to visit operators formally registered and licensed by the GFC.** This approach excluded informal actors and those who operate outside the GFC's licensing system, such as furniture retailers and other downstream businesses, limiting the scope of perspectives captured in the field. In addition, the presence of GFC staff during interviews may have influenced the willingness of FSOs to share information about non-compliant or informal practices, as operators might have been concerned about potential fines or infraction reports, leading them to focus their answers on formalized activities. While the diversity of actor types enriched the quality of insights gathered, it is important to note that **the selection of FSOs was not random and reflect an inherent selection bias**, as it was partly based on availability, accessibility, and prior contact through the GFC. As such, **the sample cannot be considered statistically representative** of the national population of FSOs. The information collected through these interviews should therefore be viewed as **illustrative** rather than conclusive, offering valuable examples and case-specific insights but not generalizable trends.

The geographic spread of the FSO sample covers Regions 2, 3, 4, 7 and 10, with interview locations ranging from remote villages such as Mainstay and Bethany to more accessible areas near major roads, including Linden and Charity. Here are some key characteristics of interviewed FSOs:

FIGURE 3. INTERVIEWED FSOS SAMPLE CHARACTERISTICS



As illustrated in the previous figure, during the interviews, we found that five of the FSOs operate with two to three different activities integrated within a single company—such as managing forest concessions, operating sawmills, and running lumberyards. Visiting these FSOs prompted us to **reconsider the categorization approach** we have used since the beginning of this consultancy and even during the VPA IMF's design phase. This new approach is described in the following section.

³ The selection process of FSOs made by the GFC was not communicated to Tero's team before the mission.

⁴ We visited 6 forest stations in total, but one refused to answer our questions and the coordinator of two other ones were not present when we were able to visit.

We also proceed with Forest stations interviews (focused on law enforcement, inspections, and employment trends). One major limitation was the **difficulty in accessing historical data**. As part of standard GFC practice, forest station staff are rotated every two years, which means institutional memory at the station level is limited. Moreover, all monitoring data and reports are sent directly to GFC headquarters for analysis, and no documentation is stored locally at the stations. As a result, it was particularly challenging to retrieve relevant information dating back to 2018, making it difficult to assess changes over time or track specific developments at the local level.

Following the analysis of phase 2 secondary data sources and the identification of key gaps we designed two targeted questionnaires: one for FSOs and another for forest stations. These tools were specifically tailored to address the data gaps encountered during the secondary data collection phase, particularly for indicators lacking reliable or accessible sources. The questionnaires aimed to gather primary information on operational practices, inspection frequency, compliance challenges, and other key aspects.

C.4.2. Focus groups with FSOs

Initially, we had planned to conduct four focus groups targeting distinct categories of stakeholders: large and small concession holders, import/export actors, downstream actors involved in processing, and professional associations. However, the official invitations from the GFC were only sent out on the same day the first two focus groups were scheduled to take place. As a result, participation had to be adjusted. On Monday, June 12th, we held a first focus group with one representative of small concessionaires and one representative of sawmills. On Tuesday, June 13th, we successfully conducted two separate focus groups: one with representatives from four large concessions, and another with representatives from three exporting companies and one professional association.

During focus groups, participants were invited to react to, confirm, explain, and comment on their own trajectories within the forest sector in Guyana, as well as on broader trends reflected in key indicators. The primary objective was to validate the trends identified through our preliminary data collection, ensuring that the figures we had compiled accurately represented the sector's realities. In addition, participants helped us interpret these trends by offering explanations rooted in their experiences and perspectives through participatory consensus. This qualitative insight was essential to deepen our understanding of how the forest sector evolved prior to the initiating of the VPA in 2018, providing a baseline against which future changes—post-2018—can be meaningfully compared in subsequent rounds of VPA impact monitoring. Importantly, this participatory approach also helped generate interest within the private sector for the VPA impact monitoring process and encouraged their willingness to engage more actively in future stages of its implementation. Participants also received the same survey questionnaire that was administered during field visits, with the aim of collecting comparable quantitative data on employment, economic performance, rule of law and environmental practices. While all participants expressed willingness to contribute and acknowledged the need to return to their offices to verify the requested information against their internal documentation, none of them ultimately returned the completed survey. This was despite multiple follow-ups attempts via email and phone. This limitation highlights the challenges of collecting detailed quantitative data from private sector actors, particularly when it requires retrospective documentation and additional administrative effort on their part⁵.

C.4.3. Final workshop with NIWG

⁵ IICA team had warned us before the mission about the reluctance of private sector to share information and participate to consultation processes.



FIGURE 4. NIWG VALIDATION WORKSHOP PICTURE



As part of Phase 4 of this assignment, the methodology, key findings, and remaining critical data gaps were presented to the members of the NIWG during a dedicated workshop held on July 8th. This session offered NIWG members the opportunity to bring valuable insights to the baseline study—commenting on observed trends, providing contextual explanations, and highlighting sector-specific dynamics from the perspective not only of the private sector, but also of civil society, Indigenous communities, and other VPA stakeholders. Given that the NIWG played a central role in co-designing the IMF structure in 2023, their input was particularly important when assessing how to address persistent data gaps. For each critical gap, we consulted them on whether the indicator should be retained (because of its strategic importance and relevance to the VPA, even if current data are missing), modified or adapted (to improve measurability or redefine concepts and methods), or dropped entirely (if considered no longer relevant or too difficult to monitor in practice). Many members emphasized

that simply acknowledging the lack of data for certain indicators already serves as an indicator of transparency and institutional capacity—highlighting areas where national data systems need strengthening and reinforcing the value of the IMF as a long-term governance tool.

Despite the relevance of the session, overall participation of the NIWG was not complete, with only 7 out of 13 entities⁶ attending the workshop⁷. To ensure that all stakeholder voices were represented in the review of findings and proposed adjustments to the IMF, we recommended that the GFC follow up directly with the non-participating NIWG members. The presentation used during the workshop was shared with the FLEGT Secretariat on July 9th, inviting additional comments or questions. However, as of the time of reporting, no further feedback was received from the remaining NIWG members.

C.4.4. Capacity

building

session

FIGURE 5. CAPACITY BUILDING SESSION PICTURE



As planned, a capacity-building session was also conducted during Phase 4 on July 9th, bringing together key teams from the GFC (including the FLEGT Secretariat, Forest Monitoring Division, Forest Resources Management Division, and Forestry Training Centre Incorporated (FTCI)), as well as representatives from IICA. The session was highly dynamic, with active participation and open discussion. One of the central topics addressed was the difficulty in accessing and compiling secondary data sources, a challenge shared by many participants based on their institutional experience. In addition to reviewing some of the baseline findings, participants provided valuable technical feedback and recommendations for improving the data collection and indicator assessment methodology. Their contributions further strengthened the robustness and relevance of the VPA Impact Monitoring Framework going forward.

As part of the stakeholder engagement process, both members of the NIWG and participants in the VPA Capacity Building Workshop provided key recommendations to strengthen future rounds of impact monitoring. A major priority identified was the need to **align future monitoring exercises with major VPA milestones**, ensuring that data collection efforts directly inform decisions and track meaningful progress. Participants also stressed the importance of **establishing formal Memorandums of Understanding (MOUs) with national institutions** to clarify roles, facilitate regular data sharing, and improve coordination. To ensure consistency and accessibility, they recommended the **creation of a centralized data system**, where all monitoring data could be securely stored and managed. Finally, they emphasized the value of **continuous data collection during outreach activities**, rather than limiting efforts to periodic studies. Taken

⁶ Entities attending NIWG workshop: IICA, Iwokrama, GOIP, TAAMOG, MoL, APA, FLEGT Secretariat

⁷ Lacking the presence of the following members: EPA, NTC, GRA, GMSA, MoAA, and NIB.

together, these recommendations offer a roadmap to improve the efficiency, accuracy, and long-term sustainability of the VPA monitoring process.

C.5. Overview of data analysis

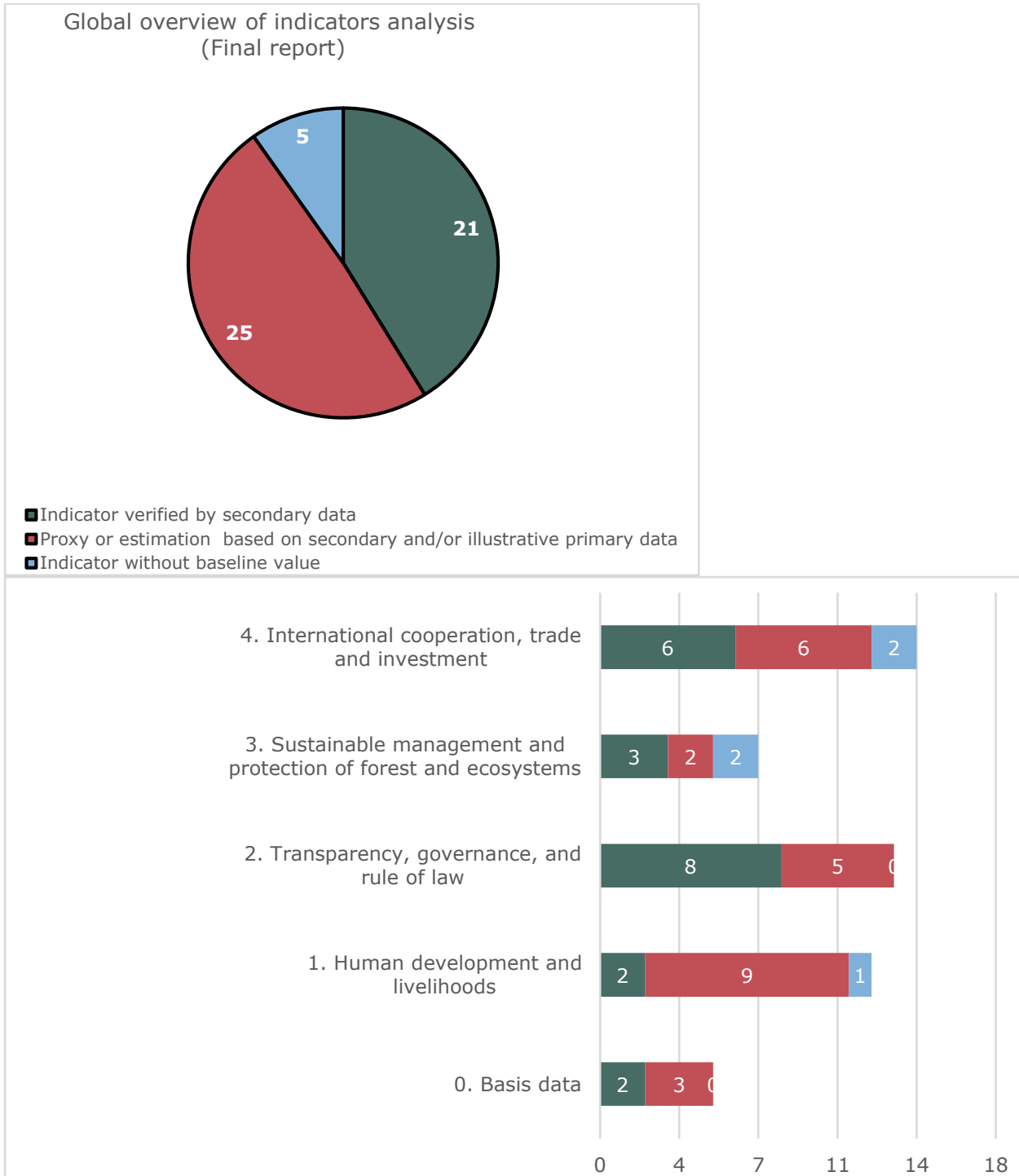
The baseline indicators were classified into three categories according to data availability and reliability (see figure below and *Annex 1*).

- **Indicators verified by secondary data** (green): National or international documentation provided baseline values, which were, in most cases, validated with stakeholders for realism and relevance (21 indicators – 41%).
- **Indicators informed by secondary and primary information** through proxies or estimations (red): While exact figures were not available, these indicators could be estimated using partial data and calculations, later completed, and discussed with VPA stakeholders for confirmation (25 indicators – 49%).
- **Indicators without baseline value** (blue): Neither secondary sources nor primary data collection yielded sufficient information to establish a baseline (5 indicators – 10%).

This distribution shows that while a significant portion of the monitoring framework can already rely on documented data, almost half of the indicators require approximation methods and a limited share remain unpopulated at this stage.



FIGURE 6. GLOBAL OVERVIEW OF INDICATORS ANALYSIS



Concerning the indicator analysis by impact area we observe the following key findings:

- International cooperation, trade, and investment (Impact area 4) shows a balanced mix between verified data and proxy estimates, though some critical gaps remain, notably on foreign investment and concession applications.
- Sustainable management and protection of forests and ecosystems (Impact area 3) benefits from robust MRVS forest cover data but faces missing values for conservation area integrity.
- Transparency, governance, and rule of law (Impact area 2) stands out with the highest proportion of indicators backed by secondary data (8 out of 13), reflecting the availability of documentation from pre-VPA stakeholder engagement processes.



- Human development and livelihoods (Impact area 1) is the most dependent on proxies or illustrative primary data, due to limited disaggregated information on employment, OSH, and livelihoods in existing national statistics.
- Basis data provides the essential foundation for several cross-cutting indicators in the monitoring framework. While differences remain between licensing datasets and actual active FSOs, these figures already offer a consistent reference point for tracking the structure and composition of the forest sector over time.

Overall, the analysis confirms that while some thematic areas have relatively solid data foundations, others—particularly those related to livelihoods and investment—require targeted efforts in future monitoring cycles to improve data coverage, quality, and accessibility.

C.6. Indicators without baseline values

Five indicators identified as part of the FLEGT-VPA monitoring framework could not be populated due to unavailability of data at the time of baseline preparation. These are: (i) 1.2.1 Volume of forest products in custody; (ii) 3.1.1 Volume of seized and forfeited timber and forest products; (iii) 3.1.4 Area and percentage of conservation areas within large concessions remaining intact; (iv) 4.2.1 Number and origins of applications to access concessions in Guyana; and (v) 4.2.2 Volume and list of foreign investments in the forestry sector. Although no further data collection is possible at this stage, during the final workshop held in Georgetown, the NIWG voted to retain these five indicators due to their long-term relevance for transparency, enforcement, and sustainable forest governance. In line with the VPA commitments on information sharing and transparency, as set out in its *Annex IX*, these indicators will be flagged for future development and inclusion in subsequent monitoring cycles, with the expectation that data availability and systems will improve over time. The main recommendation is to conduct a focused assessment to determine the specific data needs and institutional responsibilities for each indicator. It is further recommended that the GFC assume a central role in managing and coordinating the collection, storage, and dissemination of this data, to ensure consistency, accessibility, and accountability in future reporting cycles. The table below provides the status, relevance, and detailed recommendations for how these indicators should be treated in the baseline report and future monitoring efforts.

TABLE 2. INDICATORS CRITICAL DATA GAPS AND NIWG ORIENTATIONS

Indicator	Baseline Status	NIWG Majority Vote	Relevance Indicator	of Recommended Action by NIWG
1.2.1. Volume of forest products in custody	Not Established	Keep indicator	Important for assessing law enforcement effectiveness and illegal logging response	-Retain indicator -Establish data sharing protocol with GFC -Propose a pilot data extraction exercise from GFC logs
3.1.1. Volume of seized and forfeited timber and forest products	Not Established	Keep indicator	Reflects enforcement outcomes and deterrent effect of regulations	-Retain indicator -Establish data sharing protocol with GFC and GRA



3.1.4. Area and % of conservation areas of Large Concessions remaining intact	Not Established	Keep indicator	Key for monitoring forest integrity, biodiversity, and sustainable forest management	-Retain indicator -Request satellite or GIS data via REDD+ contact points -Partner with EPA to access land cover mapping data
4.2.1. Number and origins of applications to access concessions in Guyana	Not Established	Keep indicator	Supports transparency and identifies investment trends	-Retain indicator -Establish data sharing protocol with GFC -Propose extraction of basic statistics (no personal identifiers)
4.2.2. Volume and list of foreign investments in forestry sector	Not Established	Keep indicator	Important for monitoring foreign ownership, accountability, and benefit-sharing	-Retain indicator -Establish data sharing protocol with GFC and GO-Invest

D. Methodological outputs of the Baseline study

D.1. Data sources cross checking and discrepancies

D.1.1. Number of concessions, processing actors and traders

Indicators:

- 0.2. Number and areas of large concessions, Small Concessions, Community Forestry Associations, Private Lands, State Land in conversion and Amerindian villages.
- 0.3. Number of sawmills, lumber yards, processing companies and import-export companies.

We identified notable discrepancies across secondary data sources regarding the number and classification of FSOs in Guyana. The main source used in the historical trends analysis is the GFC's Forest Sector Information Report (FSIR). To complement and cross-check this information, two additional sources were considered at first: Annex 7 of the 2018 EITI (Extractive Industries Transparency Initiative) fiscal year report, and a GIS-based analysis of the 2018 GFC allocation map using the WGS84/UTM 21N coordinate system.

The comparison reveals substantial differences, particularly in the **number and surface areas of concessions**, as well as in the number of State Forest Authorizations (SFAs). Interviews with the FMD and the FRMD helped to clarify the root causes of the discrepancies observed between the EITI and FSIR datasets. These inconsistencies stem primarily from differences in the scope and purpose of each reporting system. While the EITI dataset focuses on financial records—capturing all entities registered as payers with the GFC, including those in the licensing phase—the FSIR is more operational in nature, reporting only on FSOs that are actively harvesting timber. As such, it is likely that some concessions recorded in the EITI report have not yet begun operations but are already registered in the financial system. Conversely, concessions that are no longer active may still appear in financial records due to outstanding debts, even if they are no longer reflected in the FSIR as operational entities. Furthermore, as noted earlier, the GFC allocation map is primarily a logistical tool for identifying unallocated lands and should not be used to



monitor the exact number of concessions, given the dynamic and often outdated nature of its spatial data.

The main secondary source used in this analysis is presented in Column A of the following table, referring to the GFC FSIR annual report. To complement this data, two additional sources have been considered: Annex 7 of the 2018 fiscal year EITI report (column B), and GIS analysis of the 2018 GFC allocation map using the WGS84/UTM 21N coordinate system (column D). Additionally, Column C highlights discrepancies between official figures reported in the FSIR and the EITI 2018 report.

TABLE 3. FSOS NUMBERS COMPARISONS ACCORDING TO THREE AVAILABLE SECONDARY SOURCES⁸

Source	A		B		C-DIFF		D	
Types	2018 GFC dataset (FSIR)		2018 Annex 7 Licenses (EITI dataset)		Differences (EITI – FSIR)		GIS analysis (based on 2018 allocation map)	
	Number	Areas (Ha)	Number	Areas (Ha)	Number	Areas (Ha)	Number	Areas (Ha)
Large Concessions (SFEP, TSA, WCL)								
LC – SFEP	4	1 009 687	8	1 314 421	4	304 734	4	992 281
LC – TSA	14	1 656 294	16	1 716 259	2	59 965	23	1 689 559
LC – WCL							1	21 547
LC – Iwokrama	1	371 610	1	371 681	0	71	1	351 119
Small Concession and land into conversion								
SFA	515	2 014 743	346	1 534 516	-51	31 753	488	2 009 512
CFMA			118	511 980				
State land in agricultural lease							9	13 597
Other state land in conversion								
Other Estate Forest land								
GFC Reserves	12	17 925					7	17 942
Others Research and Reserves	2	733 292						
Unallocated State Forest		7,134,059						

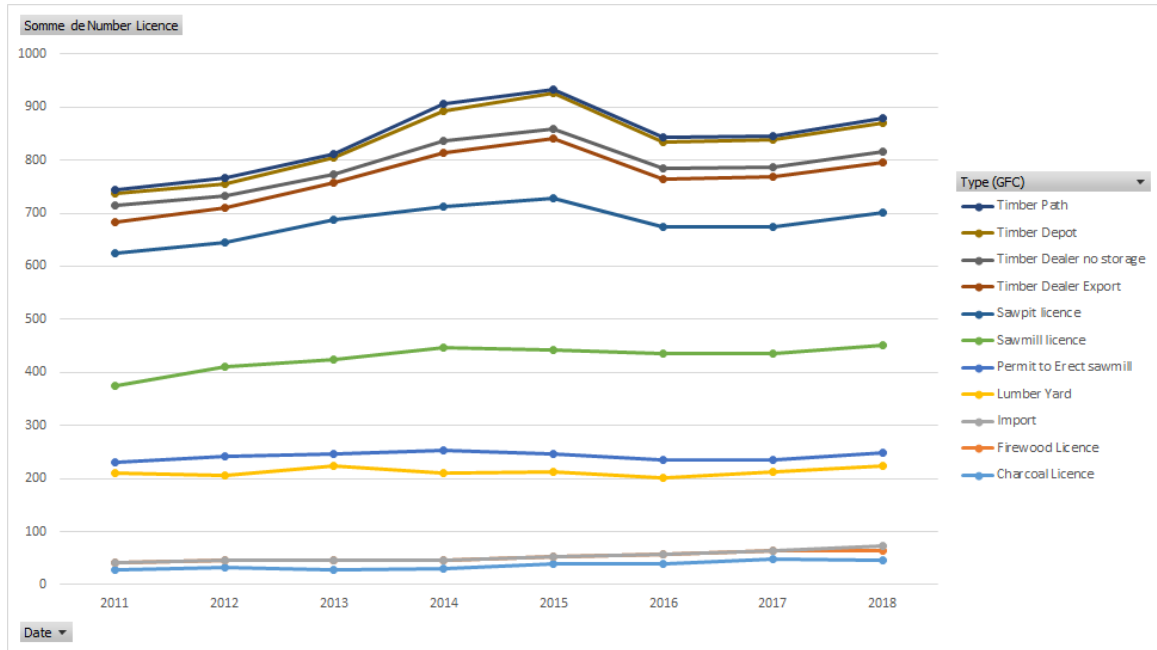
Based on these insights—and in agreement with the technical teams at the GFC—it was recommended that this analysis rely on the FSIR data, which offers greater consistency in reporting periods (produced in December for each year) and reflects the actual operational status of FSOs. Additionally, the FRMD of the GFC shared with us their internal concession database for the years 2015 and 2018. This internal dataset was verified and quality-controlled by the FRMD team, who expressed full confidence in its accuracy for those years. Therefore, the 2015 and 2018 figures used in baseline study analysis are based on this internal and validated data. The FRMD also emphasized that the status and number of concessions in Guyana are highly dynamic and can change from week to week.

The annual licenses issued by the GFC to actors involved in **processing and trade activities** offer a consistent proxy for tracking trends in sectoral engagement over time, reflecting operations such as sawmilling, lumber yards, import-export, and other wood-related businesses.

⁸ Red cells in this table reflect strong inconsistencies between FSIR and EITI reports.

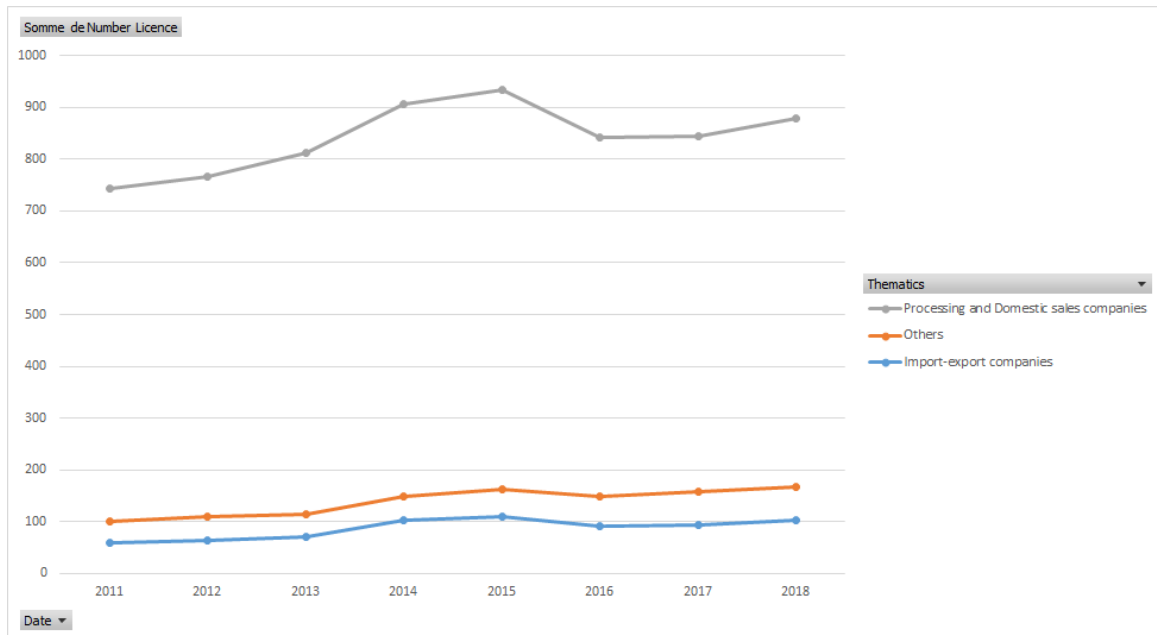


FIGURE 7. TRENDS ON DOWNSTREAM LICENCE CATEGORIES NUMBER FROM 2011 TO 2018



To facilitate the analysis of licensing trends, we developed a categorization that groups licenses according to the VPA-defined FSO categories, making it easier to observe patterns and changes over time (categories correspondence in *Annex 5* of this report).

FIGURE 8. TRENDS ON AGGREGATED LICENCES DELIVERED TO VPA FSO TYPES FROM 2011 TO 2018



For the purposes of this baseline, we categorized the licenses into three broad groups: processing and domestic sales, import-export, and other activities such as non-timber forest products (NTFPs) and charcoal production. However, according to field observations, license data cannot be used as a direct measure of the number of **FSOs**, as **individual operators often hold multiple licenses** for different activities along the value chain. Additionally, a significant number of **downstream actors**—such as furniture manufacturers, timber retailers, and timber construction companies—**do not require GFC licenses** and are therefore not captured in national forestry monitoring systems. This results in a substantial portion of the value chain remaining invisible in official statistics. Accessing business registration records from the Guyana Revenue Authority (GRA) could help fill this gap and provide a more complete picture of forest-related enterprises, but this was not feasible within the timeframe of the baseline study. It may, however, be possible for future rounds of VPA impact monitoring with information sharing agreements and obligations signed by VPA stakeholders.



Given the frequent overlap between forest concessions and timber processing facilities—such as sawmills, lumberyards, and exporters—that are operated by the same company or group of affiliated companies, the consulting team deemed it necessary to **move beyond license types and concession sizes alone**. Instead, we developed a **typology of FSOs** (cf section D.2. of this report) that reflects the operational and organizational structures behind forest activities. This approach aimed to better capture the real composition of the sector, particularly in terms of vertical integration and actor concentration. The typology includes a specific category for Iwokrama, which represents a unique case due to its combined mandate for research, conservation, and sustainable forest production. We also made a distinction between Amerindian titled lands and Community Forestry Management Agreements (CFMAs), recognizing that while some CFMAs are managed by Amerindian communities, others are led by non-Amerindian community groups.

Using the dataset provided by the FRMD, we attempted to identify cases where multiple licenses—such as concessions and sawmills—were held by the same or similarly named companies, indicating vertical integration of operations. For large operators, we limited our classification to their main concession license (e.g., TSA or SFEP) in order to streamline the analysis. Although the available secondary data did not allow us to assess technological capacity or market reach, those characteristics were validated during field visits. This typology facilitates further analysis of timber production, value chain dynamics, and regulatory compliance. Finally, it is important to note that FSOs were mapped based on the location of their concessions, even though related facilities such as sawmills or export points may be located in different GFC regions.

Conclusion for future monitoring of forest sector composition

The baseline analysis underscores the need for consistent and disaggregated data to support future impact assessments of the VPA. For Indicator 0.2, the FSIR stands out as the most appropriate source, offering annual data on the number and area of large and small concessions, CFMA areas, titled Amerindian villages, private lands, and state lands under conversion. Given the highly dynamic nature of concession status, continued reliance on FSIR will ensure consistency across monitoring rounds. It is important to bear in mind, however, that concession counts reflect administrative units rather than distinct operators.

For Indicator 0.3, the annual licensing data managed by GFC provides a useful proxy for gauging activity in sawmilling, lumber yards, processing, and import-export operations. Still, license counts do not reflect the actual number of actors, as many operate across multiple points of the value chain and hold several licenses. In addition, a significant share of downstream actors—such as timber retailers, furniture producers, and construction companies—remain outside the scope of GFC's licensing and are therefore not represented in official forestry statistics. Addressing this gap may require integrating data from complementary sources such as the GRA, though access remains a challenge but may be easier with VPA implementation. According to GFC representatives, GRA has historically been reluctant to share data—even with government entities—further limiting cross-institutional integration for sector-wide monitoring. Another important limitation is that these databases and reports capture only formal operators, meaning that a substantial part of the forest sector remains invisible in official records. One possible approach to address this would be to assume that the proportion of informality in operator registers is similar to that observed in employment data (i.e. 60%), applying the employment informality ratio to estimate the number of informal actors—though this assumption would not be entirely accurate. A more robust option would be to periodically conduct a dedicated study on the structure of informality within the forest sector in Guyana, thereby complementing the information used in the baseline study and strengthening future monitoring exercises.

Overall, maintaining consistency in data sources (particularly the FSIR and GFC licensing records), while acknowledging their limitations, will be critical for monitoring changes in the structure and dynamics of the sector and assessing the VPA's long-term impacts.

D.1.2. Employment metrics

Indicators:

- 0.4. Total number of forest workers
- 1.3.1. Number and % of formal jobs
- 1.3.3. Number and % of permanent positions
- 1.3.4. Number and % of forest workers relying on forest activities for their livelihoods



- 1.3.5. Income level of forestry workers

The **main official source for employment figures in the forestry sector is the GFC's FSIR**. These figures are compiled through a declarative process, whereby FSOs report their employment numbers to the GFC. To ensure data accuracy, GFC field officers conduct site visits to 100% of registered FSOs and verify employment records kept on-site. For large concessions, employment data is also drawn from Annual Operational Plans (AOPs). However, this methodology has several limitations: FSOs may underreport workers, especially informal or temporary employees hired for short-term tasks like harvesting or transportation. In some cases, only skilled or permanent staff are declared, while unskilled or seasonal labourers remain uncounted. Consequently, the employment data published in FSIR reports is likely to be a conservative estimate. Importantly, some forest sector actors—such as timber furniture manufacturers, construction companies, and retailers—do not require GFC licensing and are therefore completely absent from forestry-specific monitoring systems. One promising avenue to capture data on these actors would be through business registration information from the GRA. However, this was not feasible within the timeframe of this consultancy.

ILOSTAT employment data for Guyana's forest sector is based on inputs provided by the Bureau of Statistics, which is responsible for collecting and compiling the underlying figures. In its public reports on employment and economic activity, the Bureau aggregates forestry with agriculture and fisheries under a broader category. However, upon request, the Bureau provided disaggregated data separating forestry from the other sectors, while noting that the Labour Force Survey only commenced in the third quarter of 2017, and no data is available for earlier periods. It is also important to highlight that estimates at this level of disaggregation may lose statistical significance, as the survey sample is weighted to produce estimates at the national level. The Bureau's methodology relies on household surveys, where a representative number of households is visited to determine who is actively involved in the forest sector. While this approach may introduce geographic or seasonal biases, it has the advantage of potentially capturing informal employment that would not be declared through official sectoral channels. Nonetheless, the resulting employment figures appear even more conservative than those reported in the FSIR, further highlighting the challenges of accurately estimating total employment in the sector.

To address underestimation of **informal employment** in FSIR report, we relied on the Lippe report's estimations regarding the proportion of informal employment in the sector (between 60 to 75% of total forest sector employment is informal in similar countries) and **ILOSTAT estimations** (60% of the forest sector workforce is informal). The ILO applies the ISIC⁹ Rev. 4 classification to define forestry-related employment across three divisions: A02 (Forestry and logging), C16 (Wood manufacturing, excluding furniture), and C17 (Paper production). As Guyana lacks significant paper production activity, only A02 and C16 were considered in our analysis. While the LFS and ILO microdata provide useful disaggregation by gender, employment status (formal/informal), and self-employment. During meetings with GFC's FMD, it was agreed that the FSIR figures would serve as the baseline for employment, and an estimated percentage of informality derived from ILOSTAT (and Bureau of statistics) would be added to approximate the sector's total workforce. This combined approach allows for a more realistic estimation of employment, recognizing both the formal and informal components of the workforce. Although the GFC teams acknowledged and validated this methodological approach, members of the NIWG expressed surprise at the high estimated share of informal employment within the forest sector.

Both interviewed FSOs and focus group participants acknowledged that the **gender proportions** reflected in **ILOSTAT** accurately represent the reality of the sector in 2018. These ratios were therefore retained for the analysis, especially to inform gender-sensitive indicators.

TABLE 4. DATA SOURCE COMPARISON FOR EMPLOYMENT METRICS IN THE FOREST SECTOR

ISIC category	Formality	2018 GFC FSIR	2018 Labor Force Survey and ILO			Differences (GFC Minus LBS)
		Total	Male	Female	Total	
ISIC (production) 2	Formal main job	11 075	800	100	900	8 475
	Informal employment (informal main job)		1.600	100	1.700	
	Formal	8 565	1.300	300	1.700	5 165

⁹ <https://ilostat.ilo.org/methods/concepts-and-definitions/classification-economic-activities/>



ISIC 16 (Transformation)	Informal		1.500	200	1.700		
Total		19 640	6 000				13640

No quantitative secondary data was available regarding the employment of Amerindian people in the forest sector, so we relied on interviews with key stakeholders and FSOs to gather qualitative insights on their roles and participation.

Conclusion for Future Monitoring – Employment in the Forest Sector

This baseline highlights significant limitations in the availability and reliability of employment data in Guyana’s forest sector. While the **FSIR provides the most complete official dataset**, it likely underestimates total employment due to underreporting of informal and temporary workers, and the exclusion of unlicensed actors such as furniture manufacturers, construction companies, and timber retailers. Complementary sources, including ILOSTAT and Bureau of Statistics data, offer valuable insights—particularly on informality and gender—but present their own challenges in terms of consistency, statistical significance, and alignment with sector-specific classifications.

For future rounds of impact monitoring under the VPA, it is recommended to **continue using FSIR data as the primary data source, complemented by an estimated informality rate and gender breakdown** derived from international databases such as ILOSTAT and/or eventual local survey data (to be determined during each impact monitoring round). This combined approach allows for a more realistic approximation of the total workforce, capturing both formal and informal employment.

A dedicated study could also be conducted to better define the structure of informality in the forest sector, including both employment and trade dimensions. This study would help validate or refine the informality estimates currently based on ILOSTAT. Its methodology should be carefully designed to avoid bias—particularly if it involves the GFC directly—so as to ensure that informal actors feel safe and willing to participate, and that the results are credible and representative. Finally, targeted efforts should be made to generate reliable data on the employment of Amerindian peoples in the sector, which remains largely undocumented in existing datasets.

D.1.3. Production, and trade metrics

Indicators:

- 4.1.3. Volume of traded forest products with a focus on traded timber species distribution and value-added forest products
- 4.2.3. Volume and total value of exported wood and articles of wood, compliant with international phytosanitary standards

Discrepancies have been identified between Guyana’s FSIR and the International Tropical Timber Organization (ITTO) databases in relation to timber production and export data. To clarify the roots of these inconsistencies, the consulting team held a dedicated meeting with the Guyana Forestry Commission’s Forest Monitoring Division. The FMD officer explained that one key difference stems from product classification: for instance, ITTO aggregates logs and roundwood under a single “logs” category, whereas the FSIR distinguishes between them. Another critical difference is that FSIR figures reflect the volume of timber actually traded, while ITTO data are based on the volumes authorized for export through permits—figures that may not directly translate into actual shipments. Timing discrepancies also affect comparability: FSIR data are compiled annually in December and may omit end-of-year transactions, whereas ITTO submissions are made the following year and may reflect a more complete dataset.

It was also noted during the meeting that ITTO’s data are based directly on official reports submitted by the GFC through a dedicated national reporting channel. ITTO regularly acknowledges the quality and timeliness of Guyana’s submissions at the beginning of its biennial reports, which reinforces the credibility of the source despite discrepancies.

Given the structure, consistency, and internal validation of ITTO data, the baseline study uses ITTO figures as the primary source for export metrics (sub-impact area 4.2.). Conversely, national production and



internal trade volumes are sourced from the FSIR, which remains the most detailed national report available (sub-impact area 4.1.). However, even within FSIR data, important gaps persist. For instance, according to FSIR 2018, the total production volume of timber products was 400,220 m³, while reported trade volume was only 144,683 m³. This discrepancy suggests that a large proportion of timber is either consumed domestically, traded informally, or not formally captured in trade statistics. In the case of raw logs, production volumes significantly exceeded trade volumes, implying that approximately 83% may be circulating outside formal commercial channels.

Importantly, for exports to the European Union, the FSIR provides more granular and specific information than ITTO. Given the central importance of tracking the VPA's impact on market access in Europe, FSIR data have been used for that specific subset of export analysis within this baseline.

In summary, while both data sources originate from the same national authority, they respond to different reporting logics and timelines. For now, ITTO data is considered the most appropriate for global export analysis due to its stability and international standardization, while FSIR remains the best reference for production and internal trade tracking.

D.2. Baseline study data gaps

D.2.1. FSOs inspections

Indicators:

- 0.5. Number of annual FSO's inspections (Overall total and disaggregated per forest stations)
- 1.1.1. Number and % of inspected FSOs about OSH practices compliance
- 2.4.2. Number and % of inspected FSOs about legality definition principles and criterions

Despite extensive efforts during Phase 3 of the study—including field visits to forest stations, interviews, and high-level meetings with the GFC—obtaining historical, quantitative data on the number of inspections conducted annually on FSOs proved unfeasible. Methodologically, this limitation is rooted in both institutional practices and information management constraints. GFC field officers rotate every two years and are required to transfer all records to headquarters, resulting in the absence of archival inspection data at the local level. Furthermore, although we met with technical teams and the Commissioner, Mr. Edward Goberdhan, access to the central GFC inspection database was not granted.

During capacity-building session (phase 4), GFC staff indicated that relevant information might be found in Independent Forest Monitoring (IFM) reports. However, our review of these reports revealed that they primarily document infringements or areas of non-compliance and do not include systematic, quantitative data on the number or frequency of inspections conducted by GFC or other institutions.

Given these constraints, we relied on qualitative methods to reconstruct inspection patterns. Semi-structured interviews with FSOs and focus group discussions with operators and stakeholders across various regions provided insight into inspection practices. While not statistically representative, these interviews offered indicative trends. Most FSOs—regardless of size—reported monthly inspections by GFC teams, with some larger or export-oriented companies experiencing weekly or even twice-weekly visits. Large concessions often benefit from a permanent GFC presence within or near their operation zones, while smaller and more remote FSOs are typically monitored by mobile inspection teams.

The data collected also suggest variations in inspection focus: for example, logging FSOs are typically checked for permit validity, tagging and stamping compliance, and boundary respect, whereas processing facilities are subject to inspections concerning worker safety, packaging, and environmental practices. While Occupational Safety and Health (OSH) practices are, by legal mandate, the responsibility of the Ministry of Labour, none of the FSOs interviewed reported any visits from the Ministry prior to 2018. In practice, OSH controls—when conducted—were implemented by GFC officers, primarily in processing facilities and large concessions.

Overall, while this methodological approach does not allow for the production of sector-wide inspection statistics, it provides a grounded, qualitative understanding of how inspection regimes are applied in practice. Importantly, these findings highlight the need for improved data transparency and inter-agency coordination—particularly with the Ministry of Labour and the Environmental Protection Agency—if inspection trends and enforcement of labour standards are to be effectively monitored over time as part of the VPA Impact Monitoring Framework.



D.2.2. Timber custody, seizing and forfeiture

Indicators:

- 1.2.1. Volume of forest products in custody
- 3.1.1. Volume of seized and forfeited timber and forest products

Under *Guyana's Forests Act* (2009) and its accompanying regulations, the processes of seizure, custody, and forfeiture of timber are clearly defined and regulated. Seizure refers to the act of intercepting and marking timber suspected of being harvested or transported in breach of the law. Custody denotes the temporary retention of the timber by the State or the operator, pending further investigation. Forfeiture is the final transfer of ownership to the State, typically following a court order or the expiration of a statutory period. These procedures are further detailed in the *Forest Regulations* (2018), which specify the forms and documentation required for handling seized forest products and the roles of the GFC, Village Councils, and other relevant authorities.

Despite the existence of this robust legal and procedural framework, the baseline study encountered a critical data gap regarding the volume of timber in custody and that which has been formally forfeited. The assessment team made multiple formal requests for this information throughout the consultancy period. These requests included written communications, including emails sent directly to the GFC FMD head, as well as verbal requests during bilateral meetings with the GFC—including a meeting with the GFC Commissioner, who indicated that the information could be shared. However, no database, statistical information, or report containing that information was ultimately made available.

To address this gap, the team proposed collecting regional-level data through field visits to forest stations. However, this effort also proved unsuccessful. GFC field staff explained that station-level data on seizures and custody were not maintained locally over time, primarily due to the routine staff rotations that occur every two years. As a result, previous documentation is not archived or transferred across teams but sent directly to the headquarters in Georgetown.

This issue was raised during capacity-building sessions held with GFC staff, where the consultancy team presented the importance of these indicators for assessing VPA progress. GFC representatives acknowledged that such data does exist at the central level and reiterated their commitment to improving transparency. Nevertheless, the discrepancy between the institutional discourse and the accessibility of operational data represents a persistent limitation to evidence-based monitoring.

The inaccessibility of data on seized and forfeited timber is particularly notable given that Guyana's legal framework requires the GFC to maintain registers of forest produce under custody (Articles 29 and 44 of the *Forest Regulations*) and that *Annex IX of the EU-Guyana VPA* explicitly includes seizure and forfeiture volumes as mandatory transparency elements. Other sources, such as press articles and public statements, occasionally refer to major concession repossessions—such as the BaiShanLin case involving over 600,000 hectares—but these do not disclose the actual volume of timber forfeited. Similarly, announcements of planned timber auctions rarely include information on volumes.

The 2022 CIFOR-ADE VPA impact study confirmed these observations. It found no evidence of publicly available data on forest product seizures or forfeitures and noted that data gaps persist across several enforcement metrics (Leszczynska, y otros, 2022). The study also highlighted that disagreement between the EU and Guyana over the reintegration of confiscated timber into the legal market delayed the VPA's ratification after its initialling in 2018.

In conclusion, the lack of accessible data on seized and forfeited forest products constitutes a significant methodological limitation for this baseline study. It impedes the ability to track progress under indicators 1.2.1 and 3.1.1 and undermines transparency and accountability within the forest governance framework. Establishing clear reporting protocols and ensuring anonymized publication of enforcement data would represent a key step forward for future VPA impact monitoring.

D.2.3. NIS and GRA registers

Indicators:

- 1.3.2. Number and % of FSOs contributing to the P.A.Y.E. and NIS.



At the beginning of the consultancy, a dedicated meeting was held with the FLEGT Secretariat to discuss the availability of information from the National Insurance Scheme (NIS) and the GRA, particularly regarding the number of FSOs complying with national obligations such as PAYE and NIS contributions. The FLEGT Secretariat explained that they had been requesting this data for several months without success. Despite the fact that, following the signing of the VPA, these institutions are expected to share relevant information with the entities involved in the Guyana Timber Legality Assurance System (GTLAS), no data had been provided to them. The Secretariat advised us to submit an official request, while noting that it would be unlikely to obtain such data for the period prior to the VPA signing, as there was no binding obligation for those institutions to disclose the information at that time. Following this guidance, we submitted a formal request in March 2025, accompanied by a letter of information signed by the European Union Delegation. Despite this effort, the request was not successful. We also attempted to reach out to both institutions by phone, but were unable to obtain the requested secondary data. Consequently, the indicator 1.3.2. Number and % of FSOs contributing to PAYE and NIS could not be quantified at a national level for the baseline. However, the future ability to access this data will itself serve as a meaningful indicator of institutional transparency and improved information sharing among GTLAS actors.

D.2.4.FSOs trainings

Indicators:

- 1.1.3. Number and % of trained workers on OSH practices
- 1.2.2. Number and % of trained workers about record keeping
- 2.4.3. Number and % of trained FSOs about legality definition

Although the Forestry Training Centre Incorporated (FTCI) reportedly maintains specific registers on training activities—including OSH—we were not granted access to these internal databases. Instead, we were referred to public records, such as the GFC's Annual Reports available only up to 2017, which list aggregate training figures without specifying thematic content, making it impossible to isolate OSH-specific figures for instance. As a result, the research relied heavily on qualitative data from field interviews and focus groups with FSOs. According to the FTCI Director, no standalone OSH training sessions were conducted prior to 2018; rather, OSH concepts were integrated contextually into other training modules. However, this claim is contradicted by at least one Forest Management Plan from a large concession that explicitly references FTCI-led OSH training. These inconsistencies, coupled with the absence of accessible official detailed records, significantly constrained the ability to develop a comprehensive and verifiable picture of trainings across the forest sector. They also underscore the need for more data transparency for future impacts monitoring rounds because the detailed information exists (we were able to see the FTCI database that contained all the information needed to make those analysis).

D.2.5.Grievances mechanisms

Indicators:

- 2.3.2. Number of formally registered grievances linked to the VPA implementation
- 2.3.3. % of resolved grievances linked to the VPA implementation
- 2.3.4. Average resolution timeline (in number of days) of grievances and disputes treated through the VPA complaint mechanism
- 3.3.1. Number and types of alerts and complaints about pollution on land, water, noise, and air originated by FSOs

In conducting this consultancy, no formal complaint or grievance databases—anonimized or otherwise—were made available to our team. Despite this limitation, we were able to access valuable information from the EPA, primarily because the number of environmental grievances reported to the agency was low (2). All known cases had been handled directly by the EPA's small and specialized Forest Division team of seven professionals, who were able to recall and describe each case.

At the time of this baseline study, the EPA reported two unresolved complaints related to forestry operations in 2018, primarily concerning dust, noise, or other forms of localized pollution. Interviewed EPA officials explained that complaints are typically submitted via telephone, logged in a formal internal system, and



followed by field inspections, data collection (e.g., water quality testing), and—in persistent cases—compliance audits. However, no FSO has ever been prosecuted for environmental infractions, and formal enforcement appears limited to administrative measures.

Regarding the GFC, we found no formal mechanism for tracking or publishing environmental or operational grievances involving FSOs. The only available insights came from direct interviews with FSOs and community stakeholders. Of the FSOs interviewed, 18% (3 of 17) reported having received at least one environmental complaint prior to 2018. These included issues such as improper waste disposal, dust pollution affecting adjacent villages, fire hazards, and non-compliant structures. The grievances were distributed across all FSO categories. In Amerindian territories, two additional cases emerged: one of unauthorized clear-cutting within a community forest and another involving river pollution linked to sawmilling and mining operations.

Other community-based grievances were documented during the VPA stakeholder consultation process. For instance, in Yamparo village (Chiliber), residents requested EPA intervention for a pollution issue, and in Katoonarib, Amerindian leaders raised complaints about forest burning by agricultural leaseholders, leading to a GFC referral to its Forest Monitoring Division. These cases highlight the informal, fragmented nature of grievance reporting prior to the VPA, with little evidence of systematic tracking or resolution monitoring.

Importantly, the lack of a formal, accessible database of complaints reflects a broader transparency gap in how grievances are recorded and addressed within the forestry sector. Although national institutions are legally responsible for handling and documenting such complaints, there is no standard mechanism for consolidating or sharing this information—whether for environmental concerns, tenure disputes, or operator misconduct.

Looking ahead, the operationalization of the VPA grievance mechanism represents a crucial opportunity to improve transparency, accountability, and community trust. However, due to the sensitive nature of grievance content, future complaint databases are likely to remain confidential. To balance transparency with confidentiality, we recommend that the GFC develop an anonymised grievance reporting database dedicated to impact monitoring. This system could publish regular summaries combining quantitative data (e.g. number and type of complaints by FSO category, resolution timelines, recurrence) with qualitative information about procedural effectiveness and trends.

D.2.6. Private investments metrics

Indicators:

- 4.1.1. Total and average amount of capital investment by FSOs
- 4.1.2. Number of FSOs accessing financial services
- 4.2.1. Number and origins of applications to access concessions in Guyana
- 4.2.2. Volume and list of foreign investments in Guyanese forestry sector

The absence of comprehensive, disaggregated national data limited the ability to quantify investment accurately across the sector. First, available data reflects only capital accessed through Bank of Guyana financial services. This excludes substantial investments made through private or informal channels, such as personal savings, family financing, internal reinvestment, or equipment acquired through supply chain arrangements. These types of investments—especially prevalent among small and community-based FSOs—are critical to understanding the financial structure of the sector but remain undocumented in official records.

Second, loan data from the Bank of Guyana only provides a snapshot in time, capturing loan statuses rather than cumulative capital invested over the years. As such, it does not reflect total capital flows or the lifetime investment profiles of FSOs. Furthermore, the disaggregation of financial data by FSO type (small, medium, large, Amerindian) or activity (harvesting vs. processing) is not available, further complicating efforts to interpret patterns or disparities in access to capital.

In the absence of reliable secondary data, the consultancy team conducted direct interviews with 17 FSOs. While most operators could not provide exact monetary figures, they were able to list the machinery and infrastructure acquired before 2018. Based on this, investment ranges were estimated using market prices



from the pre-2018 period. This method, while informative, is not statistically representative and does not replace a potential national-level investment tracking.

These gaps highlight a broader challenge in financial transparency and monitoring in the forest sector. If investment trends are to be meaningfully tracked over time—as part of assessing sectoral formalisation, growth, and compliance capacity under the VPA—mechanisms will need to be developed to systematically capture and anonymise capital investment data from both formal and informal sources within the VPA impact monitoring implementation.

Indicator 4.1.2 was initially designed to assess access to the Forestry Revolving Fund as a key source of capital investment for FSOs. However, since the fund was not operational prior to 2018, it was not possible to evaluate its impact or reach during the baseline period. As a result, the scope of the indicator was broadened to examine overall investment patterns in the forest sector, including access to both formal financial institutions and informal funding mechanisms. This expanded approach provided a more comprehensive understanding of capital flows and highlighted significant disparities in financial access across FSO categories. For future monitoring, it will be important to clarify whether the indicator should continue with this broader framing or return to its original focus on the Forestry Revolving Fund, depending on the fund's operational status and relevance to sector-wide financing dynamics.

Related data limitations also affected the monitoring of applications to access forest concessions (Indicator 4.2.1). While Annex IX of the VPA mandates the disclosure of information about allocation processes, there is currently no public or centralized database providing disaggregated information on concession applications by origin, year, or applicant type. The consultancy team initially sought to fill this gap by engaging Go-Invest, which may hold relevant records; however, Go-Invest staff informed us that they do not share such information with external consultants and would only disclose it directly to the GFC. This institutional barrier further limited our ability to analyse trends in concession access or identify shifts in domestic versus foreign demand. A follow-up effort is planned in the next phase through GFC channels to clarify this point.

Indicator 4.2.2 on the volume and list of foreign investments in the forestry sector faces similar limitations. While secondary sources and media coverage confirm that foreign investors—particularly from China, India, and Malaysia—held control of the vast majority of large concessions as of 2016, there is no official, disaggregated dataset publicly available that systematically tracks foreign direct investment flows into the sector. In 2018, no updated national-level investment register was accessible through the GFC or other institutions. The rise in export and production figures during the period suggests continued and possibly increased foreign involvement, but the magnitude and nature of these investments remain unclear. This limits the ability to monitor the evolution of foreign participation, its potential influence on sector dynamics, and the alignment of foreign-held operations with VPA and SFM commitments.

Together, these data gaps across financial access, concession applications, and foreign investment prevent a full understanding of capital structure, ownership trends, and market evolution within the Guyanese forestry sector.

D.2.7. Gender and ethnicity

Indicators:

- 0.4. Total number of forest workers
- 1.2.2. Trained workers on record keeping
- 1.3.1. Number and percentage of formal jobs
- 1.3.3. Number and percentage of permanent positions
- 1.3.4. Worker relying on forest activities for their livelihoods
- 1.3.5. Income levels of forestry workers
- 2.1.1. Number and percentage of forest stakeholders effectively accessing disclosed information

While secondary data formed a solid basis for many indicators, the gaps encountered—especially for sensitive topics or those not routinely monitored—required significant methodological adaptations. The analysis highlights the need for strengthened institutional data systems and improved inter-agency data sharing to support ongoing and future VPA impact monitoring efforts.



Among the eight indicators requiring disaggregation by gender and ethnicity, we were able to collect partial information from available sources, though significant data gaps remain. For employment-related indicators—such as 0.4 (total number of forest workers), 1.3.1 (number and percentage of formal jobs), and 1.3.3 (number and percentage of permanent positions)—ILOSTAT provides general data, including gender breakdowns and distinctions across parts of the value chain. However, it does not offer any data specific to Amerindian workers. No secondary source was found addressing employment among Amerindian populations, despite field observations suggesting informality may be more prevalent in these communities. We relied on Amerindian operators interview to understand employment structure among those types of FSOs. Regarding training indicators—1.1.3 (number and percentage of workers trained in OSH practices) and 1.2.2 (trained workers in record keeping)—the GFC annual reports were the primary source, but they only offer general numbers and mention Amerindian operators without specifying how many were trained or providing gender-disaggregated data. We therefore relied on primary data collection through FSO surveys, asking how many workers were trained and classifying responses by FSO type. However, **because the data refer to the period prior to 2018, respondents were often unable to recall details about gender or ethnicity.** For indicator 1.3.4 (workers relying on forest activities for their livelihoods), no national or international data were available, so the question was included in the FSO survey. Yet, the answers were not sufficiently detailed to disaggregate by gender or ethnicity—only by type of FSO. Similarly, for 1.3.5 (income levels of forestry workers), while national and international sources such as FSIR and ILOSTAT provided figures, feedback from the FMD indicated these were not realistic. We therefore used the FSO survey to gather more reliable estimates, allowing disaggregation by FSO type (including Amerindian operators) but not by gender. Finally, for 2.1.2 (number and percentage of forest stakeholders effectively accessing disclosed information), information session reports often included participant lists with affiliations or villages. We manually transcribed these into analysable formats, enabling us to identify the number of women and Amerindian persons who attended, although the level of detail varied across reports.

D.3. Designed methodologies

D.3.1. Methodological sheets

To support replicability in the baseline study, we designed a set of methodological sheets that are presented in *Annex 2* of this report. The selection of indicators included in these sheets was guided by the diversity of methodological approaches applied (or expected to be applied) in the VPA IMF. These approaches range from the exclusive use of secondary data, to mixed methods combining secondary and primary data, to the integration of diverse secondary sources such as administrative databases, survey results, and remote sensing products (e.g. satellite imagery). The objective was to showcase a broad spectrum of methodologies that can be mobilized to determine baseline values and support subsequent monitoring rounds. Each methodological sheet provides a structured description of how the indicator was defined, measured, and interpreted. Specifically, the sheets include:

- Indicator title and definition – clarifying the scope, policy relevance, and alignment with the VPA impact areas.
- Scope and disaggregation – indicating the geographical and thematic levels at which the indicator can be assessed (e.g., national, regional, by FSO type, gender, or ethnicity).
- Measurement method – describing step-by-step how the indicator value is generated, including proxies or estimation techniques where exact data are not available.
- Data sources – distinguishing between national and international databases, official reports, academic literature, and, where relevant, primary data from surveys and focus groups.
- Limitations – highlighting gaps, potential biases, or constraints in data availability and quality.
- Interpretation and analytical use – explaining how the indicator should be read in relation to others, and how it can inform analysis of the VPA's impacts.
- Possible visual representations – suggesting appropriate formats (e.g., bar charts, maps, timelines, or box plots) to communicate indicator results effectively.

By compiling these methodological sheets, the consultancy laid the groundwork for future monitoring cycles, where improved data availability and systems—particularly those foreseen under the VPA commitments—can strengthen the robustness of each indicator.



D.3.2.FSOs typologies

The way FSOs are currently classified under the VPA framework reflect legality status but does not accurately reflect the structure and dynamics of the forest sector in practice. The integration of multiple activities within these companies appears to be linked to a broader trend of capital growth, suggesting that value chain vertical integration is both a strategy and a consequence of increasing financial capacity. This is a critical insight for understanding how the forest sector is evolving in response to the VPA.

Based on our field observations and the administration of the survey, we were able to distinguish four main types of FSOs operating in Guyana: Amerindian operators, small FSOs, medium FSOs, and large FSOs (see table below). These categories reflect significant differences in economic size, technical capacity, and organizational structure as described in the table below.

TABLE 5. FSOS BASELINE CATEGORIES DESCRIPTIONS

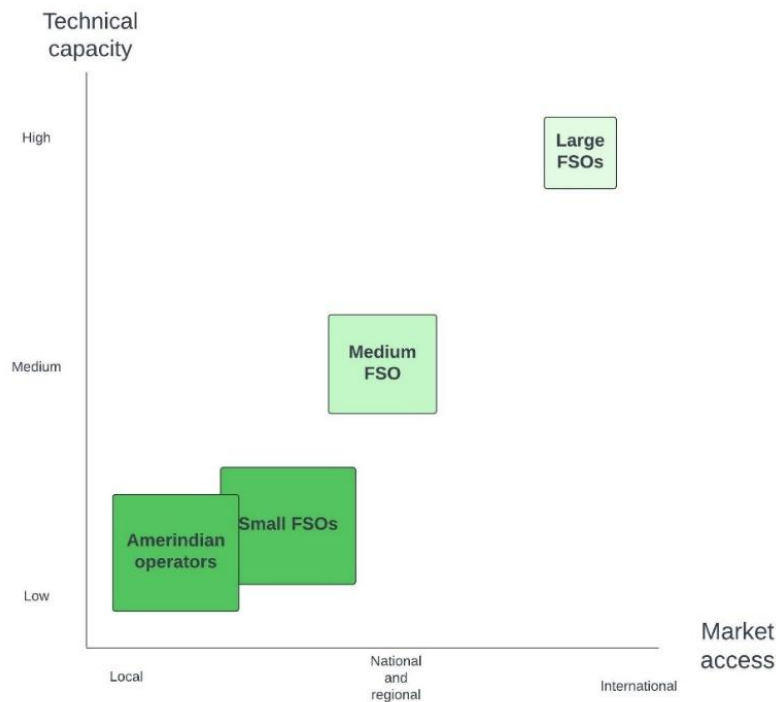
Item	Amerindian operators	Small FSO	Medium FSO	Large FSO
Activities	Collective management (Community Forest Organizations or customary title holders) Subsistence logic or community income generation Local workforce Limited technical capacity Often supported	Semi-mechanized or manual activity No own sawmill, often subcontractors or informal suppliers Very limited means (chainsaws, sometimes mobile sawmill) Low level of formalization (paper records, little or no accounting)	Small to medium-sized sawmill and small concession(s) associated sometimes. Several activities of the timber value chain (vertical or horizontal integration of the value chain). Basic mechanical means (circular saws, trucks) Basic administrative systems, often under pressure to comply	Large concessions or several small concessions and / or integrated industrial sawmill, with secondary processing workshops. Structured administrative systems and traceability
Micro economics and markets	Often supported by NGOs or public programs Possibly subsistence-based structure No access to financial services Domestic market Revenue records are often absent or individually managed. Lowest revenues Between 0.1 and 5 M GYD per member	Sell wood to intermediaries Mainly domestic market Some organized as associations (Friendly Societies) but generally earnings often measured per member. Between 1 – 5 M GYD per member	Local or regional markets (Caribbean) Between 5 and 100M GYD in annual sales revenue	Significant fixed capital (fleet of trucks, heavy machinery, advanced technologies, infrastructure) Capacity to export to international markets (EU, China, USA) Provide financial services to small FSOs Usually more than 500MGYD in annual sales revenues (with possible exceptions)

Among all the characteristics considered, technical capacity and level of market integration emerged as the two most decisive parameters for categorizing FSOs, as they provide the most relevant lens to understand



forest sector dynamics and potential changes linked to VPA implementation. The following figure presents a graphic representation of how each FSO category is positioned according to these two key criteria.

FIGURE 9. GRAPHICAL REPRESENTATION OF FSOS CATEGORIES POSITIONS WITHIN TECHNIFICATION AND MARKET



Those FSOs categories will be particularly relevant to monitor forest private sector structure and dynamics over time as the VPA is implemented. For instance, it will be important to observe whether large FSOs increase their exports to Europe or other markets where trust is strengthened through the FLEGT VPA licensing scheme, whether medium FSOs are able to access and benefit from these new market opportunities, and whether small FSOs and Amerindian operators experience gains in technical capacity and formalization as a result of changing market dynamics.

D.3.3. Transparency assessment

To assess the level of transparency achieved during the VPA implementation period preceding this baseline study, a structured and comparative methodology was developed and applied. The objective of this assessment was to establish a factual baseline and methodology of how well the transparency commitments outlined in *Annex IX of the VPA* were met. Annex IX specifies a list of information types that are to be made public, the entities responsible for doing so, and the communication channels through which the information should be shared.

Comparative Framework and Source Analysis

The assessment began with a detailed content review of consultation workshops and communication activities carried out during the VPA preparatory and implementation phases. This included documentation of public presentations, press releases, stakeholder engagement materials, reports shared by the FLEGT Secretariat, and other institutional actors.

The types of information disseminated during these events and through official platforms were compared against the disclosure obligations listed in Annex IX. These obligations cover categories such as legal frameworks, concession data, production and trade statistics, verification system performance, enforcement actions, and summaries of independent monitoring results.

Scoring System

To facilitate a consistent and objective evaluation, a structured scoring system was designed. Each of the information categories listed in Annex IX was assessed using the following three-tiered compliance rating:



- **YES** – Fully compliant: Information was made available through official or public channels, was up to date, complete, and regularly published or updated as per VPA expectations. The format and access method were appropriate and easily traceable by stakeholders.
- **PARTIALLY** – Partially compliant: The information existed or had been disclosed at least once during the reviewed period, but was either difficult to access, outdated, incomplete, or not published through the appropriate channels (e.g., shared only during in-person workshops with no online follow-up).
- **NO** – Not compliant: No evidence of publication or communication was found during the period under review, despite an obligation under Annex IX.

This methodology enabled a clear mapping of compliance across all transparency categories. It also allowed the identification of systemic patterns—both areas where disclosure mechanisms functioned adequately and where significant gaps persisted.

Outcome and Analytical Value

This scoring-based approach provides a robust and replicable tool for future rounds of impact monitoring, offering a way to track progress on transparency over time. It also establishes a baseline reference that VPA institutions can use to improve public communication strategies and reinforce institutional accountability.



TABLE 6. EXTRACT FROM TRANSPARENCY ANALYSIS TOOL CREATED FOR IMPACT AREA 2.1. ¹⁰

		Methods for implementation				Comments	Compliance of information practices with Annex IX				
		Official reports	Websites of the GFC and the Forest Products Development and Marketing Council Inc. MNR, GIA among others	Multi stakeholder implementation platform	Videos		No	Part ial	Ye s	Not Applicabl e	
2. INFORMATION TO BE PUBLISHED BY THE JOINT MONITORING AND REVIEW COMMITTEE											
2 . 1	Structure and procedures guiding the functioning of the Joint Monitoring and Review Committee (JMRC)					In 2018, the JMRC was not yet initialed. Reason why, we consider that for the baseline study this section is not applicable. But it will be necessary to assess the information sharing practices for following rounds of IMF implementation.					1
2 . 2	Minutes of the meetings of the JMRC and summaries of decisions										1
Information on the independent audit:											
2 . 3	(a) terms of reference for the independent audit of the GTLAS;			1		The Annex VI of the VPA was presented in its successive version during stakeholder's consultation workshops between 2014 and 2017			1		
	(b) manual of procedures for the independent audit;					No information about the manual of procedures included in stakeholders' consultation reports. It is likely that this manual was not yet elaborated at this date. In the VPA, it is explained that the manual of procedures will be developed by the independent auditor.				1	

¹⁰ The methodology applied included an assessment of all information-sharing methods listed in Annex IX of the VPA. However, for presentation purposes in this Word format, the columns referring to Public meetings, Press conferences, Radio, and Television were omitted from this table, as these channels were either not in use before 2018 or no evidence of their use during that period could be found.

	(c)	selection criteria of the Independent Auditor;			1		During the stakeholders' workshops, information was shared about the type of actor to be selected to implement the independent audit. The selection criteria of independent auditors are included in the Annex VI that was presented in its preliminary version.			1	
	(d)	summary reports from the Independent Auditor.					Not applicable since no independent audit has yet been implemented in 2018.				1
Annual reports produced by the JMRC, in particular information relating to:											
2 . 4	(a)	progress made by Guyana in the implementation of each of the elements of the GTLAS and all other matters relating to implementation of this Agreement;	1		1	1	The series of workshops held by the GFC and the NTWG aimed to share advances on the VPA negotiation including a description of GTLAS to gather comments and recommendations			1	
	(b)	progress made in achieving the objectives of this Agreement, as well as actions to be taken within a deadline specified in this Agreement and the corresponding complementary measures before the FLEGT licensing scheme is operational;			1		During those workshops, the timeline of VPA negotiation and FLEGT licensing scheme timeline were shared.			1	
	(c)	the number of FLEGT licences issued by Guyana;					No FLEGT licenses were issued during this period				1

(d)	action, if any, to prevent the export of timber products of illegal origin to non-Union markets or being placed on the national market;			1		Several exchanges took place about the previous actions implemented by the GFC to ensure the legality of timber exportation to Europe according to stakeholder's consultations workshops reports.			1	
(e)	quantities of timber products imported into Guyana or having transited and transhipped through Guyana;	1				This information is included in the Forest Sector Information report (available from 2007 until 2018). But those reports were published online after 2018.			1	
(f)	the measures, if any, taken to prevent the import of timber products of illegal origin in order to maintain the integrity of the FLEGT licensing scheme;			1		This topic was mentioned during the stakeholders workshops to explore the possible consequences of illegal import of timber.			1	
(g)	cases of non-compliance with the GTLAS in Guyana and action taken in such cases;			1		The eventuality of incompliance with GTLAS and its consequences was mentioned during the series of workshops with stakeholders, but no concrete case was exposed since the VPA was not yet signed.			1	
(h)	quantities of timber products imported into the Union under the FLEGT licensing scheme, according to the relevant HS code headings and according to the Member State of the Union into which import took place (to be provided by the Union);					Not applicable since the FLEGT licensing scheme was not yet implemented.				1

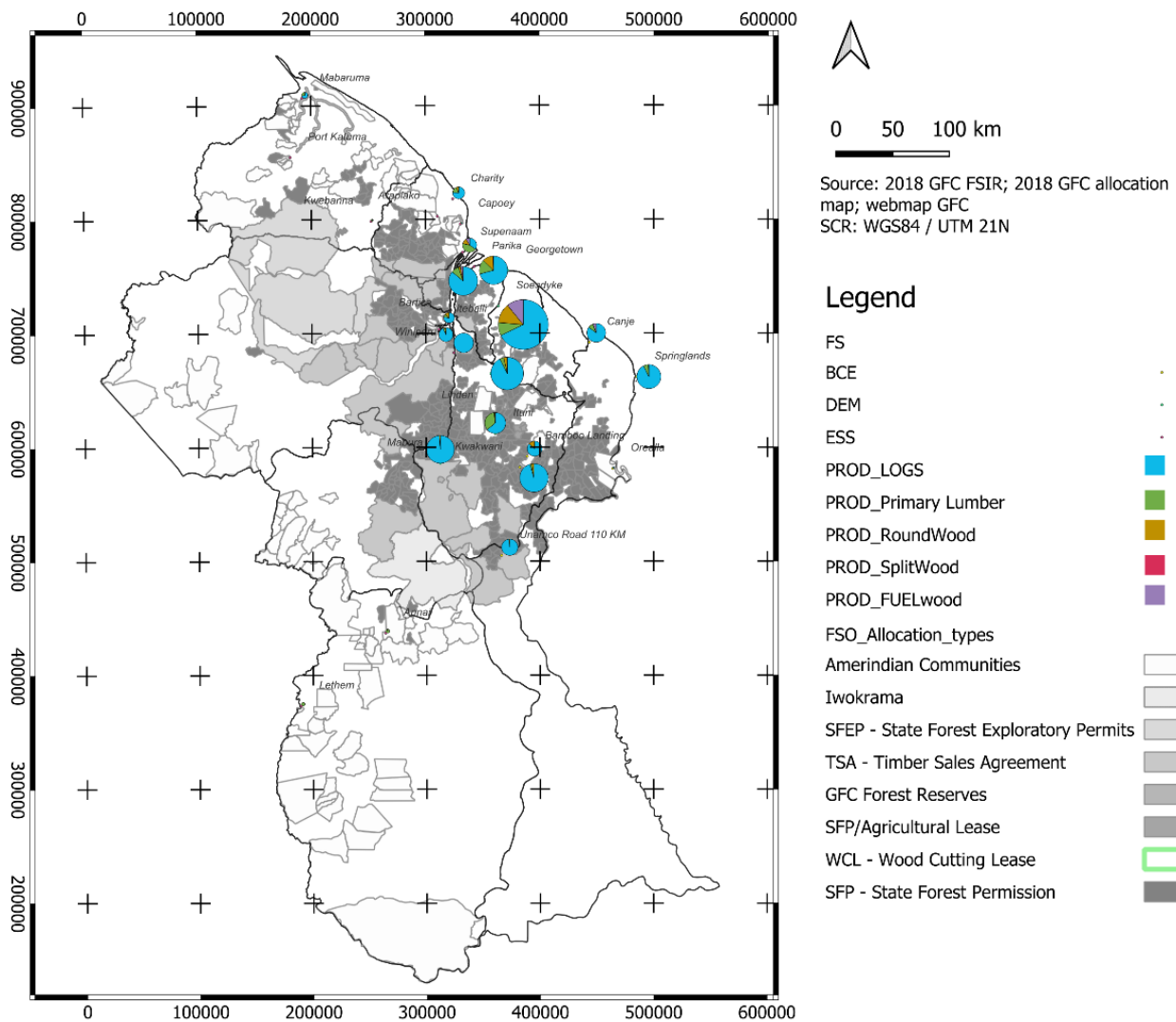
(i)	quantities of timber products exported to the Union under the FLEGT licensing scheme according to the relevant HS code headings and according to the Union Member State of destination (to be provided by Guyana);						Not applicable since the FLEGT licensing scheme was not yet implemented.				1
(j)	information on cases and quantities of timber products about which clarifications were needed between the Guyana licensing authority and the competent authorities of the Member States of the Union.						Not applicable since the FLEGT licensing scheme was not yet implemented.				1

D.3.4. Geographical considerations

For several key indicators, the consulting team chose to use **maps to represent the data**, allowing for a clearer understanding of the **geographical breakdown of forest sector actors, production sites, and infrastructure**. These maps made it easier to visualize how location influences the structure and functioning of the timber value chain in Guyana—an important dimension that tables and charts alone cannot always capture.

One of the most visible patterns is the **concentration of timber production sites** in the interior regions, particularly **Regions 1, 7, 8, 9, and the southern part of Region 10**. These areas include large concessions, Amerindian Village Titles (AVTs), and community forest areas. In contrast, **processing facilities—such as sawmills and timber yards—are mostly located along the coast**, and in the **Linden–Georgetown corridor**, where they benefit from better transport, electricity, and proximity to export ports and consumers.

FIGURE 10. GEOGRAPHICAL BREAKDOWN OF TIMBER AND TIMBER PRODUCTS (GFC FSIR, 2018)



This spatial separation between production and processing strongly shapes the way the sector operates:

- **Inland actors** are primarily engaged in harvesting and log extraction, often selling raw materials without further transformation.
- **Coastal operators** are more involved in **processing and value-added activities**, and have easier access to markets, finance, and regulatory support.
- **Remote Indigenous and small-scale operators** face higher transport costs, less frequent contact with public institutions, and fewer opportunities for scaling up or formalizing their operations.



By mapping the distribution of activities and actors, the baseline study highlights these regional disparities. Future rounds of impact monitoring should continue using **geospatial tools** to track how opportunities, services, and benefits are distributed across Guyana's forest sector.

E.Recommendations for future rounds

E.1.Secondary information collection optimization

One of the key lessons from this baseline exercise is that **the collection of secondary information is significantly more effective when led by a national institution. Many of the datasets required for the VPA Impact Monitoring Framework relate to non-public or sensitive information**, including labour inspections, enforcement actions, or revenue data. Despite formal letters of introduction, our consultancy team was often unable to access critical datasets, as these documents are not published online and external requests were insufficient to overcome internal bureaucratic constraints. A national institution—already embedded in the public administration landscape—would be better positioned to secure access through established inter-agency relationships or, when needed, through Memorandums of Understanding, non-disclosure clauses, or other formal legal arrangements that ensure the confidentiality of shared information. Additionally, national staff can conduct in-person follow-ups, which are more effective than remote outreach. In our case, key data only became available late in the process, once face-to-face contact was possible during Phase 3 and 4.

A clear example of this challenge is the case of accidents and incidents in the forest sector, monitored by the Ministry of Labour. Initially, the only secondary data we could find online dated from before the 2000s, which was not useful for establishing current trends. We submitted multiple formal requests to MoL representatives by both email and phone, but these efforts remained unanswered throughout Phases 1 and 2. As a workaround, we integrated targeted questions into our FSO survey to gather at least partial information. It was only during the NIWG workshop (phase 4), when we publicly presented the absence of MoL data, that a representative from the Ministry offered to share an internal report—a solution that could have been implemented much earlier. Upon review, we found significant discrepancies between this new data and the previously available reports, with FSOs reporting a higher number of accidents than what was captured in MoL statistics. This situation illustrates the value of continuous engagement and in-person collaboration.

We therefore strongly recommend that the responsibility for secondary data collection be assigned to a national institution—ideally one involved in the VPA process - **and with sufficient technical capacity**. Additionally, we advise that relevant data be gathered progressively, rather than waiting until the beginning of each impact monitoring cycle. This approach will not only reduce time pressure but also allow more focus on the design and implementation of primary data collection, which remains critical for several sub-impact areas and indicators.

E.2.Timeline of impact monitoring

Initially, during the design phase of the IMF, it was proposed and validated by both the NIWG members and the Joint Monitoring and Review Committee (JMRC) that VPA impacts should be monitored every two years. However, throughout the implementation of this assignment, we have revisited this recommendation based on technical analysis and stakeholder consultations. First, our experience conducting the baseline highlighted that analyzing trends over time—rather than relying solely on isolated data points—is far more effective for understanding the causal links between observed changes and the VPA implementation. This implies that longer intervals between rounds may be more appropriate to detect significant and attributable impacts. Second, through interviews and focus group discussions with FSOs, it became clear that the VPA has not yet been fully implemented. In particular, a major milestone—the start of FLEGT licensing—is expected only at the end of 2025 or early 2026, which will be key to assessing economic and regulatory impacts. We therefore propose aligning the next round of impact monitoring with such key implementation milestones, rather than fixed intervals. Concretely, **the next round should take place at the end of 2026, considering the time period from 2018 to 2025, once the licensing system is operational**. Furthermore, it will be important to allow a buffer period between the cut-off date for indicator values and the start of the impact assessment itself, to give institutions time to produce and publish the relevant monitoring reports. This approach will maximize the use of secondary data and ensure greater cost-efficiency. This revised timeline was presented to the European Union Delegation, the GFC teams and



Commissioner, and the NIWG, all of whom expressed agreement with the proposed shift toward a milestone-based monitoring approach.

E.3. Statistical samples

As highlighted in the previous sections, **the sample used for primary data collection during this baseline exercise was not statistically representative** of the entire forest sector. While it provided important qualitative insights and addressed specific data gaps, the findings cannot be generalized across all types of FSOs. To ensure a **more robust and representative dataset for the first full round of VPA impact monitoring**, we recommend adopting a stratified and purposive sampling methodology. The sampling design should reflect the structural diversity of the forest sector and ensure geographical coverage. The sampling strategy is based on two main parameters: type of FSOs and geographical location. We propose to consider four distinct FSO categories that were already used in the baseline study: (i) **Amerindian operators**, including Community Forest Organizations or customary title holders, often working under a subsistence or community benefit logic with limited technical means; (ii) **Small FSOs**, typically operating manually or semi-mechanized, with informal practices and minimal record-keeping; (iii) **Medium FSOs**, characterized by small to medium-sized sawmills and some vertical or horizontal integration of the timber value chain; and (iv) **Large FSOs**, operating industrial concessions or sawmills, often with export capacity and structured administrative systems.

terms of **geographic stratification**, the sampling should ensure a balanced distribution across major forested zones in Guyana, ideally using GFC forest station jurisdictions or administrative regions as a framework. This approach will ensure that the sample captures differences in infrastructure, institutional presence, and forest types. A collaborative effort with the GFC will be necessary to establish a reliable sampling frame, drawing from updated registries of active FSOs, including recent operational status over the last 3 to 5 years.

Within each stratum (FSO type × region), a purposive sampling approach should be applied, with potential integration of **random selection where feasible** to increase representativeness. The goal is to secure a meaningful cross-section of FSOs, reflecting diversity in operational scale, legal compliance, market orientation (domestic/export), and types of support received (e.g. donor programs, technical assistance). We estimate that a sample of **approximately 40 to 50 FSOs**—distributed proportionally across strata—would strike a balance between statistical robustness and operational feasibility, though final numbers should be adjusted based on available resources and field logistics. During data collection, standardized questionnaires and observation tools should be used to ensure consistency across interviews and allow disaggregation of indicators by both FSO type and region.

TABLE 7. EXAMPLE OF FSOS BREAKDOWN FOR A STATISTICALLY REPRESENTATIVE SAMPLE

FSO Type	Regions Covered	FSOs per Region	Total Sample
Amerindian	4	3	12
Small	4	4	16
Medium	4	3	12
Large	3	2	6
Total	—	—	46 FSOs

Finally, particular attention must be paid to ethical and logistical considerations, including informed consent, use of introductory letters provided by the GFC, and engagement of local enumerators to improve accessibility and trust. Gender and cultural sensitivity will be essential, especially when working with Indigenous communities.

For the indicator **1.3.4. Number and % of forest workers relying on forest activities for their livelihoods**, no national data source currently provides a comprehensive overview of this issue. For the indicator **1.3.5. Income level of forestry workers**, ILOSTAT and FSIR present conservative metrics. As a result, the baseline relies on qualitative insights gathered through interviews and focus groups with FSOs. To strengthen the monitoring of these indicators in future rounds, it is recommended to implement a



statistically representative survey targeting both employed and self-employed individuals across the forest sector. This would allow for a more accurate and disaggregated measurement of average wages, forest livelihood dependence, accounting for differences in worker status, FSO types, and regional contexts.

In practical terms, we recommend selecting a sample of approximately 200 individuals across the forest sector workforce, ensuring balanced representation of both employed and self-employed persons. This sample should be stratified by FSO type (Amerindian, Small, Medium, and Large) and by geographic region, using either administrative boundaries or GFC forest station areas as reference. For instance, within each FSO selected for monitoring, a subset of 3 to 5 individuals should be interviewed, capturing diversity in employment arrangements (e.g. permanent vs. seasonal, salaried vs. self-employed), gender, and roles along the value chain. The objective is to better understand the extent to which forestry constitutes a primary source of income and to identify the role of forestry in broader livelihood strategies. Including livelihood questions in a future worker-focused survey will allow for disaggregation by operator type and region and will enhance understanding of socioeconomic impacts of the VPA on forest-dependent populations.

F. Conclusion

Building on the IMF design developed in 2023, this consultancy operationalized the framework by testing the feasibility of calculating all 50 indicators across 15 sub-impact areas. This included identifying relevant datasets, assessing their reliability and completeness, conducting targeted fieldwork in five regions, and engaging stakeholders through interviews, working sessions, and validation workshops. The result is the first integrated, field-informed attempt to apply the IMF in practice.

A central contribution of the consultancy was the identification of key data gaps and methodological constraints. While several indicators could be estimated from public or institutional sources, others revealed substantial limitations—such as lack of disaggregated or geo-referenced data, lack or unavailability of records, or inconsistent definitions across agencies. The report offers practical solutions for these gaps, including proxy indicators, and refined calculation methods. Particular challenges were documented around monitoring employment formality, Indigenous inclusion, environmental compliance, and sector-specific investments dynamics among others.

To support future monitoring cycles, the consultancy produced a set of practical methodological outputs, including:

- A complete list of secondary sources of data encountered and used detailing their accessibility, technical relevance and sensitivity (*Annex 3* of the baseline study)
- A baseline indicator calculation matrix detailing data sources used for each indicator (*Annex 5* of this report)
- Methodological sheets describing methodologies used for key indicators (*Annex 2* of this final report)
- Geographic visualizations of key indicators to support spatial analysis of forest sector dynamics (presented in the baseline study)

The consultancy also emphasized the institutional conditions for sustainable monitoring. It recommends establishing MOUs with key data-producing institutions, defining roles and responsibilities, and strengthening coordination mechanisms to ensure regular access to data and stakeholder involvement. These lessons reflect the active contributions of the NIWG, the GFC, and other national stakeholders. Finally, the consultancy also included in this final report the prepared text for an information note (*Annex 3*) and a guide for the GFC to produce a video presenting the IMF and the main findings of the baseline study (*Annex 4*).

In sum, this consultancy has shown that the IMF is both useful and feasible, but not without challenges. Its successful implementation will depend on continued technical refinement, and adequate institutional support. This report lays the groundwork for that process, offering tested tools, validated methods, and targeted recommendations to guide the next rounds of VPA impact monitoring in Guyana.



Annexes

1. Data sources availability by indicators
2. Methodological sheets
3. Information note
4. Guide to produce a video about baseline findings and VPA impact monitoring
5. Detailed analysis of each indicator



Annexe 6. Bibliography

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