

# Globalisation and the Finnish forest sector: On the internationalisation of forest-industrial operations

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This article focuses on the most recent internationalisation of Finnish forest companies. The profiles of the major companies are analysed. A 'world map' is drawn to illustrate the gradual formation of forest-industrial spaces in three scales: the articulation of Finnish (national) forest interest is related to the strategic openings of the Finnish forest companies within European (continental) and global (transcontinental) contexts. The suggested world map covers both the active exporting of the 'Finnish model' and the subsequent new location of Finland in the international networks. Both material and symbolic dimensions of the process are highlighted. The slow dynamics of the paper production is set against the current fluidity of societal demands that are fed by intensifying competition between the leading companies, profit maximation among the shareholders, and keen steering by globally aware environmentalists and consumers. Finally, the eco-social consequences of the contested globalisation process are addressed by examining the most controversial signs and signals. These include size ranking of the companies, profit hunting, image and identity politics, and product certifications. The theoretical framework is based on the political-ecology literature inspired by actor- and context-specific approaches. Hence, the aim is a simultaneous analysis of both material and symbolic changes in forest-industrial practices.

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## Material and symbolic forests

The intensive internationalisation of the forest industry is currently rearranging the interrelations between the leading companies and their suppliers and customers. The governance of the companies is also under redefinition: shareholder interest increasingly conditions the managers' decision-making. The entire societal setting of the forest industry has therefore changed, both at the level of material production and in terms of financial performance and image profilation. Accordingly, this article outlines the basic forest-industrial restructuring in connection to the rise of symbolic and speculative values in paper production (see, e.g., Collins 1998; Sandberg & Sörlin 1998; Saether 1998; Kortelainen 1999a).

The specific goal is to analyse the eco-social interdependencies and consequences of the globalisation of the forest industry and trade. On the one hand, these are related to the growing demands of profit maximation and, on the other hand, to widening sustainability demands and concerns of justice. Theoretically at stake is the contested rearticulation of local–global interfaces and nature–society relations. Both are informed by a conceptual refocus on the interrelations between the material and symbolic spheres of our socio-spatial existence (e.g., Peet & Watts 1996; McAfee 1999; Murdoch et al. 2000; Zimmerer 2000). The empirical material is limited to the Finnish forest-industrial companies that are currently re-working their historical embeddedness in Finnishness and Finnish forest resources. The analysis focuses on the years 1990–2000.

The article's starting point underlines the seriousness of the current eco-social problems. The challenges of globalisation are real and acute, and demand collective and effective reforms in societal practices. These challenges can no longer be overlooked and labelled as 'trendy' constructions of eco-alarmism. This does not, however, change the fact that ecological and social imperatives are human derivations and therefore loaded with a myriad of motives. There is no way back to the modern(ist) worldview based on solid divisions between 'us' and 'them', the 'internal' and the 'external', or the human and non-human realms (Conley 1995; Whatmore & Thorne 1998; Lehtinen 2000, 2001a).

Environmental problems, violations of human rights, and other dark sides of modernisation can no longer be excluded from global and local practices (see Brown & Flavin 1999). This is the first and the most fundamental frame view of this article: it is here, in between and across the dominating ways of knowing, that new openings and radical inclusions are needed. But difficult practical challenges follow immediately: How to make the inclusions deemed necessary? On what basis should the necessities be ranked? How to cope with the consequences of these inclusions? How to evaluate the relevance of the myriad of already existing critical eco-social signals?

The task seems paradoxical. The critical voices emerge from experiences of alarming material shortcomings, but they turn into qualitative attributes when integrated into trade routines as expenses or guiding rules. Sustainability, green certificates, organic farming, just forestry, etc., are ideal models that aim at changes in human behaviour. But they are also signals in the market because they seek to measure the viability of the production process and the value of the end product. This leads to the second frame view of the article: the forest-industrial actors (as economic actors in general) are now more frequently forced to integrate qualitative aspects into their production and trading profiles. The direction of this change is currently under heated contestation. The (research) questions hence are: How to secure the validity of information concerning the basic critical material conditions in our local–global world? Especially, how to secure the validity of the transition from material to qualitative criteria? How to identify and evaluate the signals of the actors and target groups? How to confirm that even the most marginal(ised) but concerned voices will be heard?

The 'qualitative turn' within the forest trade is taking place in the negotiations concerning the central criteria of credibility and indicators of sustainability. Concretely, the macro-level merger logic follows size and credibility rankings of the key actors. The stock markets are sensitive to the behaviour of the companies, and the markets 'read' the credibility labels of the suppliers. New and contested measures of forest certification have been introduced and publishers and media houses are now willing to confirm the sound background of the paper they use (Fürstner 1996). Finally, the disputed guarantees confuse the consumers. The third frame view of the article thus argues that the main forest-industrial actors are increasingly conditioned by the (more or less public) negotiations of credibility. These negotiations, while surfacing as economically significant, turn into forums of hegemonic competition. This competition is about the formulation of the primary form and content of the negotiations, including the subsequent optional distribution of loads and benefits defined in the reached agreements. In known examples, the initial eco-social worries have turned into a 'game' of relational positions and benefits and have resulted in an illusion of strengthening eco-social viability (see, e.g., McAfee 1999; Tirkkonen 2000). Again, difficult questions emerge: How to learn to identify the continuously changing conditions and rules of this 'game'? On what basis should the concerns with 'good' and 'bad' motives be distinguished? How to avoid processes where the judges judge their own cases? How to make an ethical argument economically convincing?

The operations and negotiations are documented in this study with the help of geographical scaling. The 'Finnish model' of forest-industrial modernisation is briefly described as a historical context whereupon Europeanisation (since the mid-1980s) and globalisation (since the mid-1990s) have developed as new phases of activity for Finnish companies. All these phases, however, are integrally characterised by strong interdependencies across these dominating spatio-temporal scalings and marked by rapidly evolving discursive contents. This is the fourth and final frame view of the article: the forest-industrial actors and activities seem to become evaluated in connection to the spatio-temporal scales they are primarily identified with. European companies differ from global companies and this makes a difference, e.g., in merger negotiations. This tends to confirm and

legitimate the hegemonic historico-spatial practices and, moreover, the direction of reach: globalisation becomes the primary goal and even the guiding ideological discourse. The scaling appears as a construction of reference fields (for the competing actors) and it proceeds through merit and status assessments. 'Europe' (or 'Finland'), for example, varies according to each discursive field: 'Cultural Europe' differs from 'Fort Europe' that refers to political boundaries, and *Nokialand* can hardly shadow its Finno-Ugric roots (although this may be easier for individual companies). A continuous ideological competition rages between, and within, the dominant spatio-temporal scalings.

The 'Finnish model' illustrates the role of this inter-scaling in forest-industrial practices. The successful export of this model during the early years of current globalisation seemed to essentially change the model itself. Finland the Forest State turned into an integral part of the Greenbelt of Northern Europe (Lehtinen & Rytteri 1998). Similarly, the European Union looked significantly different in the new context – more bureaucratic and regulative – from inside than from outside, as Casimir Ehrnrooth (1995), the then leading spokesman for Finnish forest industries, strongly argued. In addition, the global reach of the forest industry suddenly turned into concerns about local sensitivity. The companies grew big with their transcontinental operations, but were confused by regional cultural variations and local specificities (Hornborg 1998; Ovaskainen et al. 1999; Mietinen & Selin 1999).

In the following, Finnish forest-industrial firms are analysed within the described framework. The phases of internationalisation (export phase, Europeanisation, globalisation) are mapped and evaluated as challenges to both Finland and the companies, as well as to the new actors and arenas of the evolving 'game' scene.

## Exporting Finland

During the twentieth century, Finland became integrated in the globalising economy as an exporter of forest-industrial products. The process intensified between the World Wars and was not challenged until the rapid rise of information technology industries in the end of the century. The share of forest products in total exports fell from 37.6 percent in 1990 to 28.9 percent in 1997 and to

29.4 percent in 1999. The Finnish export profile nevertheless still continues to be exceptionally forest-dominated. In other boreal countries with parallel forest-industrial histories the level of 'forest dependency' has stayed below 20 percent of the exports. The respective numbers were 14.9 percent in Sweden and 16.7 percent in Canada in 1996 (Avain... 1998).

Most of the world's forest-industrial production is limited to domestic markets, but Finland has oriented towards export trade. The focus is on the core countries of the European Union: France, Germany, and Great Britain. In 1999, circa 90 percent of the paper produced in Finland was exported. Only Sweden achieved almost the same export level (84%). In Canada, the export share reached 75 percent, while in other paper-producing countries it stayed much lower: slightly below 50 percent in France and Germany and below 10 percent in the USA and Japan. South Korea reached the export level of 32 percent in 1999 (Forest industry... 2001a).

The Finnish emphasis on export is increasingly a matter of scaling. In the framework of the European Union, export and import activities between the EU countries are part of the internal trade. The broader spatial view brings up new issues of trade, modifying the coding of forest statistics. It also makes comparisons with federal Canada easier. Consequently, the EU scaling brings along several important changes in forest strategy formulations. For example in 1995, when Sweden, Austria, and Finland entered the EU, the Union became a net exporter of forest products and the status of forest-industrial policy rose within the Union. Moreover, Finnish forest experts have developed Pan-European Forest Certification (PEFC) criteria for forest management. This has also strengthened the 'continental scaling' of forest-based trade (Hazley 2000).

During the past few decades, the Finnish forest industry has been internationalised by expanding its production and ownership abroad, especially in Western Europe, but also transcontinentally. In 2000, 43 percent of the paper and board production capacity of the Finnish companies was still located in Finland, whereas 44 percent was based elsewhere in Europe and 9 percent in the USA (Forest industry... 2001a). In comparison, the production capacity abroad was circa 10 percent in 1980 (Lammi 2000: 33). The rapid internationalisation is due to an industrial restructuring which has ranked three Finnish forest industry compa-

nies to the top-twelve list of largest forest industry companies in the world (Stora Enso, UPM-Kymmene, and Metsäliitto/M-real) (Fig. 1).

The rapid expansion and top ranking of the major Finnish companies owes a lot to the national subsidies prior to the EU membership. The success was made possible by a combination of numerous collaborative linkages and risk-sharing mechanisms within the national context that strengthened the competitiveness of the companies. The companies themselves simultaneously created a successful outward-looking path by broadening their scope from pulp and newsprint towards coated papers, liquid packaging board, and speciality papers. This unique state-company combination – the ‘Finnish model’ – was the background recipe for the global launch during the late 1990s (Näsi et al. 1998; Koskinen 1999; Donner-Amnell 2000; Moen & Lilja 2001).

Simultaneously, the structures of company ownership went through a major transformation as part of the expansion. Global investors, seeking maximal profit, emerged as influential actors of forest trade. The shareholders followed the company investments keenly, bringing a new layer of sensitivity to the decision-making. During the past few years, the companies have faced a stronger signal to slow down the speed of capital allocation. Behind this pressure have been international investors who react quickly against risky moves of the firms by selling their shares and thus lowering the stock prices. The setting is crucial to a capital-intensive industry where over-investment

has been a repeated problem. Periods of overcapacity become reflected as fluctuations in price levels and profitability that worry the investors. This is contrary to the earlier Finnish national context characterised by less critically supported expansive investment strategies (Moen & Lilja 2001).

The current competitive internationalisation is in a state of discordance. The large companies are searching for firm (long-term) market positions and even leadership in selected product groups through mergers and by investing in the renewal of capacity. The investors evaluate every move as a possible signs of eroding (short-term) profitability. Hence, the companies need to address both the material and symbolic dimensions of paper-making. They need to take risks in order to maintain or enhance their status in the markets, but, simultaneously, they have to appear as attractive global corporations with market power. The risks of rapid fall in the market are numerous. They emerge increasingly often from the speculative side of trading, as is typical of the current age.

The international sphere of speculation is a significant element behind the current Finnish forest-industrial policy and an integral part of the company dynamics as an outcome and a price of speeded outward orientation. In the spring of 2000, the share of foreign (that is, non-Finnish) ownership in the three principal Finland-based (‘Finnish’) companies ranged from Stora Enso’s 70 percent to UPM-Kymmene’s 59 percent and Metsä-Serla/M-real’s 35 percent. It is evident that the American-style ‘shareholder ideology’ has arrived

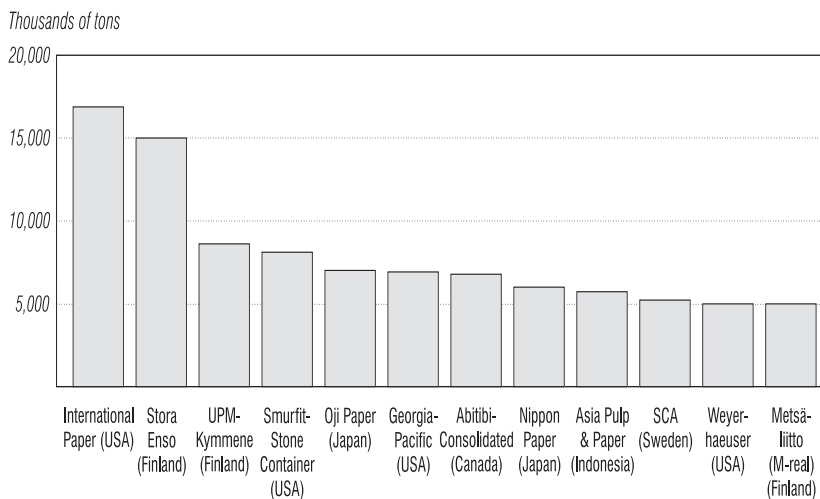


Fig. 1. The world's largest paper and board producers in the fall of 2000; per capacity (Forest industry... 2001a; Lilius & Rantanen 2000).

in European economies, putting considerable pressure on the companies to improve their financial attractiveness and short-term profitability (Saastamoinen 1999; Lammi 2000; Moen & Lilja 2001).

## Finnish companies in Europe

The major Finnish forest companies and the state clearly sought international competitive positions actively. The societal support was considered necessary among those involved in national forest-sector politics. Consequently, the companies integrated in the EU ahead of the state of Finland. The initial connection was, of course, the Finnish export orientation, but the actual contextual change took place during the 1980s in the form of expansive continental ownership of production capacity.

The Europeanisation was not an easy process for the Finnish companies. The northern newcomers were considered outsiders which played with unfair rules, e.g., gained benefits from devaluations of the Finnish currency (*markka*) and kept the domestic production costs (i.e., timber and energy prices and employer expenses) at an artificially low level. The most heated debate, however, was related to overcapacity. The supply of fine paper, magazine papers, and sawn timber had exceeded the demand for several years during the early 1990s, resulting in serious reductions in price levels and in unused capacity of the mills. In France, especially, the paper producers and sawmill managers felt that their economic space was eroded unjustly, and the Finnish 'invaders' faced protectionist governmental reactions. The main Finnish forest exporters were therefore invited to negotiate with the EU in 1994 in order to solve the serious structural overcapacity problem (Laitinen & Jokelin 1994).

The setting changed in 1995, when Finland entered the EU together with Sweden and Austria. The era of domestic devaluations of the Finnish *markka* was over and the EU became a self-sufficient exporter of paper. Soon afterwards, the EU founded a central office for the coordination of the forest-industrial benefits. It also specified the role of forest-based industries as one of the trading policy emphases that could benefit from structural funds and internal research programmes (Hazley 2000).

The leading Finnish forest companies achieved a firm hold in the continental market. For a while

it seemed that the Finnish forest map was to become exclusively Western European, with strong regional concentrations in Germany, Great Britain, and France (CD-Fig. 1). This was especially true till 1997.

In Europe, outside Finland, *UPM-Kymmene* (United Paper Mills-Kymmene Inc.) has become an important producer of coated magazine paper in Wales and Scotland, whereas its operations in northern Germany are based on fine paper production. In addition, the company is an important producer in France, where it concentrates on pulp, newsprint, and fine paper grades. UPM-Kymmene's 'French strategy' has faced serious drawbacks, however, partially as a consequence of the above-mentioned trade confrontation between Finland and France. A withdrawal from magazine paper production near Rouen in 1997 lessened the company's visibility in the country.

*Enso* (Enso Gutzeit Inc.) merged with the Swedish *Stora* (Stora Kopparberg Inc.) in 1999. The new company immediately won a place among the three leading paper and board producers in the world. Both companies were among the world's top ten forest companies already before the merger. In Europe, *Stora Enso* has a strong position in Finland, Sweden, and Germany. During the 1990s, before the merger, Enso had actively invested in Germany. It opened a newsprint unit, supplied by recycled fibre, in eastern Germany in 1994 and bought a newsprint and magazine paper unit near Karlsruhe a few years later. *Stora Enso* also owns a sizeable fine-paper unit in the Netherlands. Sawing, traditionally a central element in Enso's domestic strategies, now has another base in Austria. *Stora Enso* has activities also in the Baltic countries and Russia. A branch unit *Pakenso* has invested in cellular board production in Tallinn, Riga, and Palapanovo, south of Moscow. *Stora Enso* has joint operations with its partners in the Karelian Republic. There, *Ladensso* is an important purchaser of timber for the pulp and paper plants in eastern Finland.

*Stora Enso* also inherited *Stora's* earlier European operations, including eight major paper or board plants in Sweden and five large pulp, paper, or board units in Germany, Belgium, and France. In addition, the pulp production at *Stora Celbi* in Portugal is strategically important for the company. The supply of wood for *Stora Celbi* is based on eucalyptus plantations (*Stora...* 1998).

*Metsä-Serla/M-real* is another important fine-paper producer in Europe. After the purchase of

Swedish Modo Paper in 2000, it became a continental market leader in this grade (Modo Paperin osto... 2000). Modo Paper has large fine paper units in Sweden, Germany, France, and Austria. The merger was originally accompanied with the plan to sell the production of tissue papers to the Swedish SCA (Svenska Cellulosa Aktiebolag), but the EU Commission prevented this: the SCA's market share in tissue papers would have grown too large. The setback caused serious liquidation problems for Metsä-Serla/M-real and it seems to have forced the company to withdraw from magazine paper production in southern Germany. During the latter half of 1990s, Metsä-Serla achieved a visible role in the production of coated magazine papers in Germany, thanks to the cooperation with Myllykoski Paper. This alliance is now under reconsideration (Iivonen 2001).

*Myllykoski Paper*, a family-owned company from southern Finland, has succeeded in keeping the ownership in the hands of the Björnberg family. This has secured some entrepreneurial freedom and elasticity: decisions are made according to managerial aims, not for attracting broader ranks of shareholders (Rantanen 2000; Iivonen 2000a). In comparison, Metsä-Serla/M-real is very dependent on the cooperative organization of Finnish forest owners (Metsäliitto) that aims at keeping the major shareholder's voice heard in the company (Seppänen 2000).

*Ahlstrom Industries* has a highly specialised production profile and a well-established transcontinental production network that deviates strikingly from the volume-based strategies of the other companies. Ahlstrom's notable paper units in Germany and northern Italy produce industrial filter papers, package covers, and some other special paper grades (Ollikainen 2000).

The Europeanisation was generally a natural and necessary step for the Finnish companies. New limits and risks soon emerged, however. This was primarily due to the emerging stronger regulative interests of the EU. In the eyes of the forest industry, the Union had become a bureaucratic unit that did not develop enough its competitive advantages within the global spatial division of labour (Ehrnrooth 1995). The last years of the twentieth century consequently witnessed a new emphasis on transcontinental relations and operations.

## Transcontinental operations

The active globalisation of the Finnish companies is a novel phenomenon, but it was not launched without earlier contacts and experiments in transcontinental production. Past experiences evidently had a significant influence on the new strategies that varied from one company to another.

The overseas success of Ahlstrom Industries was due to a strict concentration on special papers, mainly industrial filters. The strategy was based on flexible customer orientation. This recipe has proved useful in Europe, Brazil, South Korea, and the USA. Among the other Finnish companies, only Myllykoski has long-term overseas experience. In 1980, Myllykoski bought a paper mill (Madison Paper) in Maine, USA, following a customer's demand: *The New York Times*, after accidentally discovering the special quality of Myllykoski's magazine paper, sought closer cooperation. Myllykoski is still the local supplier to the journal's special Sunday issues. After two decades of low profile in the USA, Myllykoski announced a new move in 2000: Madison Paper bought an old (recycled fibre -based), bankrupt newsprint unit in Chicago. As in Maine, the aim is to replace the old machinery and invest in the production of coated magazine papers (Iivonen 2000b).

Initially, however, Enso was the first Finnish forest company to start transatlantic cooperation in wood processing. The project, begun already during the 1960s, gradually turned into Enso's major ownership of Eurocan Pulp & Paper in British Columbia, Canada. The company concentrated on saw milling and kraft paper production. After economic and political setbacks, Enso withdrew from British Columbia in the early 1990s. The difficulties were partly related to the growing local environmental concerns regarding the company's clear fellings (Brax 1991). The merger with Stora in 1999 nevertheless brought Enso back to transatlantic paper processing: Stora had long experience in Eastern Canada (Hornborg 1998). The new Stora Enso soon expanded over to the US markets by purchasing Consolidated Paper (in 2000), an influential actor in the Great Lakes area. At the time of the merger, the combined enterprise was announced to be the world's largest producer of paper and board by capacity, reaching 15 million tons per year of mainly magazine papers (Lindberg 2000).

Stora Enso's inheritance from its constituent companies included Stora's footholds in Canada,

Brazil, and China, and Enso's orientation towards Indonesia. In Borneo, Enso has a 20-year project of tree plantations (mainly Acasia) that utilises the logged areas of rain forests. The cooperation is organised as a joint venture called PT Finnatara Intiga. Its owners are Inhutani III, the state company of Indonesia (40% of the shares), Gudang Garamin, with a Chinese background (30%), and Enso (30%). Their aim is to establish a pulp plant on the island in the near future. Stora Enso also owns 20 percent of the shares of Advanced Argo which processes eucalyptus plantations into pulp in Thailand. In addition, Stora Enso controls half of the shares of a large pulp plant in Aracruz, Brazil, which is planned to be expanded in the near future. This cooperation is a signal of the rising global importance of pulp production in South America (Nousiainen 1996; Kuvaja et al. 1998; Forest industry... 2001b).

During the last few years of globalisation, the most active and visible of the Finnish forest companies has been UPM-Kymmene that had practically no overseas experience before 1997. Perhaps due to the limited experience, its leaps over to Southeast Asia and the USA have resulted in partial drawbacks, and the real transcontinental breakthrough had not taken place by the spring of 2001. The North American strategy was initiated by purchasing a paper mill (Blandin Paper) in Minnesota in 1997. This move strengthened the company's leading global ranking in the production of coated paper for magazines, although the purchase was expensive and loaded with risks due to old machinery, low profitability, and supply problems. The purchase, however, made UPM-Kymmene an internal actor in the US markets (Miettinen 1997).

The landing of UPM-Kymmene in the USA was soon planned to be followed by a merger with Champion International, a company not much smaller than the Finnish partner. The two companies' boards had already agreed to the merger, but it became seriously contested by International Paper, the world's largest forest industry enterprise. Even more seriously, the shareholders and the mill communities expressed their worries over the merger with a European company. After a few dramatic weeks in the spring of 2000, International Paper made a better offer, leading the shareholders of Champion International repeal the earlier agreement. The widely publicized merger plan that included a symbolically significant name change (UPM-Kymmene was to become Cham-

pion International) hence turned into a serious backlash for the Finnish company (Lilius 2000a, 2000b; Meadows 2000).

This backlash forced UPM-Kymmene to reconsider its transatlantic strategy. It is therefore likely that the future steps become smaller and better prepared. The aim will be the same, however: to win a secure position in North America. This was in fact confirmed in the early fall of 2000 when UPM-Kymmene announced a purchase of Repap in New Brunswick, Canada. Repap was a deeply indebted company that had been for sale for years, but its main product, magazine paper, suits well the purchaser's profile.

UPM-Kymmene initiated its Southeast Asian operations also in 1997. The company announced a cooperation plan with Asia Pacific Resources International (April) in fine paper production and marketing. The initial plan included a joint foundation of a paper unit close to a pulp mill in Riau in Sumatra, Indonesia. It was rejected, however, due to the economic recession in Southeast Asia during the last years of the century. The plan was also severely criticised by a network of local and global rainforest conservationists (Kuvaja et al. 1997; Miettinen & Selin 1998), possibly affecting the withdrawal. The April cooperation, however, resulted in UPM-Kymmene's ownership in a fine paper mill near Shanghai, China. Its future success is highly dependent on China's political stability.

The Southeast Asian project has tied UPM-Kymmene into economic cultures and resource policies that differ from the Western ones. This makes the company vulnerable to risks that arise from the culture gap. The most worrying issues are related to undemocratic political practices, human rights, and the continuing exploitative devastation of rain forests. For a Western company this means entrepreneurial risks, but also new marketing problems due to the rising global awareness of the consumers.

The most transcontinental of the Finnish forest companies is *Jaakko Pöyry* that has specialised in forest-industrial consulting. In the late 1990s, the company had offices in over 20 countries, with regional clusters of consultation in South America, Europe, Southeast Asia, and the USA. Jaakko Pöyry concentrates on country- or area-specific "Forest Sector Master Plans" that cover consultancy from forestry practices, wood processing, and logistics to market and management development with an aim at expansive pulp and paper produc-

tion. The Master Plans are programmes for intensifying wood mobilisation and paper production in the client countries. Recent clients include Brazil, Nepal, Russia, and many of the Southeast Asian countries. The programmes have functioned as tools for introducing Finnish expertise to the clients. In many cases, the Finnish companies specialised in different branches of forest expertise (from reforestation and tree plantations to the whole chain of forest industrial machinery, such as forest tractors, entire plant units, and integrates) have initially arrived in the target countries as sub-contractors of the Master Plans. Both the United Nations Development Programme (UNDP) and the Finnish development cooperation agency FINNIDA have supported this cooperation financially (Ulvila 1997; Lehtinen 1999).

### Local and global Finland

The gradual globalisation of the forest sector is loaded with risks and drama – at least if observed from Finland, a country with a strong historical dependency on forests. The Finnish know-how spreads in different parts of the world and the ‘Finnish model’ is applied to joint projects. The overseas success and visibility of Finnish forest companies is undoubtedly one central element of the Finnish globalisation. The world map of forestry is made partly by Finnish expertise.

The forest-based globalisation has a dark side, however. The leading companies can no longer integrate any local or national premises into their strategies, as they did earlier (Koskinen 1999; Kortelainen 1999b; Rytteri 2000). This would now cost too much for their competitiveness. Similarly, Finland’s position has changed during the ongoing transnational networking of paper production and company ownership. In the new spatial division of labour, Finland might keep its role as a home base for some key companies. It might also remain an important supply and production area for these companies. Finland will evidently exist on the world map of the companies as a resource base and an area of mass production, a supplier of virgin fibre and selected paper grades. The setting is framed by Finland’s geographical location in the boreal coniferous zone, providing the market with long-fibred pulp. Finland is also part of the EU’s northern wilderness and a bridge to the forest resources of north-western Russia.

The wilderness role of Finland within the EU has added a new dimension to the setting. The EU’s environmental regulation that emerges, e.g., in the form of Natura programmes and Greenbelt visions (CD-Fig. 2), functions as a risk signal to the companies. They therefore invest abroad, beyond Europe. This brings along the risk of slower modernisation rates in domestic production technology. The problem of stagnation in wood processing design therefore arises. The companies still hold a key position in national forest economic policy, however. This tends to keep Finnish forest-industrial activities deeply integrated in the international division of paper production. The export orientation is thus structurally determined, and especially the country’s leading forestry provinces remain vulnerable to fluctuations in pulp and paper markets.

This *translocalisation* process is not only a matter of changing roles within a broader spatial division of labour. It is also loaded with symbolism. For example: precise identification of the largest forest companies has become difficult. During the era of globalisation, it is misleading to talk about ‘Finnish’ companies when referring to those companies from Finland that are largely owned by US American investors and whose central production capacity is located abroad. This confusion is obvious in the names of the companies and the contested renaming during mergers and acquisitions. Often the purchaser ‘swallows’ the one purchased and its name or trademark simply disappears off the market. Some names, however, are combinations or compromises of names that incorporate the past of the merged companies. Stora Enso has a Swedish-Finnish background and even some specific localities can be distinguished behind the names: *Stora Kopparberget* originates from a mining locality in central Sweden (Axelsson et al. 1980), whereas *Enso* is an industrial town in the territory ceded to the Soviet Union after World War II and now called Svetogorsk (Kortelainen & Kotilainen 2000).

Of course, the naming is (only) a matter of symbolic significance and easily ignored when set against hard economic benefits. During the merger negotiations in North America in the spring of 2000, UPM-Kymmene was ready to take the name of Champion International. ‘Kymmene’, however, relates the company to its Finnish roots: the valley of the Kymi River (in Swedish, Kymmene) is a central part of Finland’s forest-industrial history. The use of the Swedish name reminds of the ori-



gins of the company's initial capital that came from Finland's Swedish-speaking entrepreneurs. This capital was unified with the majority population's forest capital in 1995, when UPM-Kymmene was established. The historical merger wiped away the deep-rooted confrontations between the two leading private forest industry groups in Finland (Näsi et al. 1998).

The other Finnish global forest actors also carry similar pasts in their names: Ahlstrom is a name of a family, Jaakko Pöyry refers to an individual, and Myllykoski is also related to family ownership. Metsä-Serla/M-real has roots partly in *Serlachius*, a family company integrated in the operations of the Finnish forest owners' Metsäliitto in 1986. In the winter of 2001, soon after Metsä-Serla's reorientation towards fine paper production, the company announced its new name, M-real, which can be seen a symbolical disengagement from the past. For the consumers, *Serla* stands for tissue papers and washroom convenience, whereas the new M-real is a key actor in fine paper in Europe. In addition, the Finnish word *metsä* (forest) connects Finland generally to its eastern Finno-Ugric past.

The importance of the companies' initial localities and 'founding fathers' underlines the value of symbolism and cultural continuity within forest-industrial restructuring. Most of the symbolic connections have disappeared during the mergers, however. Only few of the localities are still represented. This is a striking contrast to the era of national forest sector, when the company names were closely related to their main operational bases or the companies were named after the towns: Oulu had Oulu Inc. and Kajaani had Kajaani Inc. Even Nokia Inc., a global actor in telecommunications business, has its roots in a small forest company in the mill town of Nokia near Tampere.

The local and family pasts of the companies are also loaded with memories not so willingly recalled. Towns with only one significant industrial employer were often paternalistic communities, where the companies, local elites, and townspeople behaved single-mindedly (e.g., Solecki 1995; Kortelainen 1999b). Public disagreement was sometimes unthinkable. In this respect, the North American experience of UPM-Kymmene was important: the patrimonial tradition was broken, when the shareholders' interest overcame that of the top managers.

Recently, the rules of global financial speculation have emphasised the role of shareholders at the cost of leading managers, affecting the com-

pany identification. Today, the owners keenly steer the managers and changing strategies cause rapid shifts in the stock markets. Often the owners seek the best short-term options, which can run counter to the long-term benefits of the company. From another perspective, this shift may be regarded as an opening towards more participatory decision-making in the forest-industrial policy. Even the minor owners have a vote in the meetings and critical issues can thus be brought to the agenda. All this can be considered positive, at least if set against the old patrimonial model of decision-making in company towns.

Depending on the shareholder interest, the current reshaping of the forest companies can take radically different paths. The practices may become more accountable and polyphonic or, more likely, they may move towards increasingly aggressive private profit maximation. As the past decades show, however, the former alternative can only surface with the help of non-governmental organizations (NGOs) and intergovernmental regulations (see Jamison 1996). The ethical dimension needs to be publicized and made a routine measure of forest trade via negotiation processes. Some preliminary steps towards this direction have been taken already in the shareholder meetings of UPM-Kymmene, where environmental activists have raised their voices as minor owners of the company, directing the debate towards ethical and eco-social challenges of the company profilation (e.g., Lilius 2000a) (Fig. 2).

## Forest trade and green images

Globalisation has made environmental values integral elements of forest trade. In order to secure their market share, the companies need to address their environmental performance and profile. This is also true for the Finnish companies. They have become cautious of the political risks of loggings in the old-growth forests, because today's consumers want to know the origin of timber. The value preferences become concrete for the forest companies via such customers as the leading newspapers, journals, producers, and media houses. In the name of their interest in circulation and profit, they wish to minimise the new environmental (and economic) risk. Hence, reader responses and even boycott risks increasingly condition forest-industrial strategies (Fürstner 1996; Lehtinen 1996).

The transnational companies have not been able to free themselves from the intensifying competition while becoming bigger than ever. They are subjected to changes in their operational contexts and networks. This makes the companies vulnerable to varying contextual shifts – and also to their own strategies. Wrong moves in global competition turn easily into falling profit options and losses in the stock markets and even difficulties within the markets of the end products. The global economy thus seems to become more fragile over time.

In the 1990s, the fate of the remaining old-growth forests emerged as an aching issue in Finland's forestry (Lehtinen & Rytteri 1998). As seen from Central Europe, these forests are among the last remaining natural areas of the entire continent. The consumers of Finnish paper are aware of this and the most marginal lands of the North have occasionally emerged as 'hot spots' of con-

sumer politics. Similarly, broader social and ethical issues concerning the legitimation and justice dimensions of paper production have been introduced to the companies as critical aspects of globalisation. The problems of uneven and unjust development have emerged both in Finnish domestic settings and overseas, and now at stake is not only the green image of the companies. Instead, the role of the whole of Finland and its national credibility are weighed in the global division of labour.

The problem of credibility is entangled in the issue of forest certifications. Originally, they were introduced as a means to guarantee the respect of sustainability and biodiversity concerns in economic forests and that certain areas of old-growth forests would be left untouched. Later, however, it has been debated whether the certifications should also cover such social criteria as the wealth of logging communities and forest work-



Fig. 2. A nature activist sat on a bench of top councillors at the UPM-Kymmene company meeting and was proposed by another shareholder-activist an alternative candidate to Martti Ahtisaari, the former president of Finland, to be elected to the company's board. The activist Thomas Wallgren lost the election (0.25% of the voters supported and 99.75% opposed him), but the event redirected the discussion towards the risky features of vested state-company interests during the era of globalisation. Consequently, the practical mode and ethics of exporting the 'Finnish model' was widely debated in the media after the meeting. From left to right: Martin Granholm, Juha Niemelä, Gustaf Serlachius, Iiro Viinanen, Tauno Matomäki, and Thomas Wallgren. (Published in *Helsingin Sanomat* 22 March 2000, front news page A3. Reprinted by the permission of Lehtikuva Oy.)

ers and the general eco-social viability of the entire chain of forest-based production and consumption. This is indeed a contested process which has brought several difficult and yet unresolved dilemmas into the global forest map (e.g., Beckley 1996; Rees 1999; Barnes et al. 1999)

In Northern Europe, there are two competing systems of forest certification. The Pan-European Forest Certification (PEFC) is an intergovernmental forest certification process guided by Finnish expertise. The model concentrates on forest management and aims at guaranteeing the sound origin of timber. Changes in forest cover and health, lumber production, non-timber values, diversity and conservation issues, and the socio-economic aspects of forest management are highlighted. Forest Stewardship Council (FSC) certification is supported by several international environmental organisations. The Council has included several social factors into its certification procedure and the participatory dimension of forest planning and wood processing is underlined in particular. The long-term socio-economic well-being of forest workers and forestry-dependent communities must be confirmed via negotiations and consultations with people and groups directly involved in, and affected by, the operations. In the case of loss or damage that affects the legal or customary rights of local people, a fair compensation mechanism is demanded (Ahas et al. 1999; Lloyd 2001).

FSC is the more proactive one of the two systems, whereas PEFC proceeds more reactively, emphasising the certification as a means of marketing (Salmela 2000). In general, it seems that the ecological concern has become widely accepted as a conditioner of the forest trade while the broader eco-social dimension still causes confusion.

The ongoing debate is intensive, even though the result seems largely clear already: the broader eco-social criteria are to be implemented into the assessments of the sustainability of wood processing and refining. As a telling signal of the setting, WWF Europe and several other environmental civic organisations published a series of claims addressed to PEFC in April of 2000. Firstly, the civic organisations demand PEFC to show that it actually leads towards better forest management and not only to a confirmation – i.e., *greenwashing* – of the differing national and local practices already in use. Secondly, PEFC has to follow the Local Agenda 21 directions, agreed

by the meeting of the United Nations' Conference on Environment and Development (Earth Summit) in Rio de Janeiro in 1992 and include the demands of broader participation in the criteria. This claim is related to the accused dominance of industrial and private forest owners' interests in PEFC-based cooperation. Thirdly, PEFC has to look beyond Europe and include global forest issues in its views. The European scope, as PEFC's critics say, should necessarily be linked to Eurasian and transatlantic issues, as well as to global North–South relations (Asunta 2000).

The certification debate has emerged as a central element in the current restructuring of the forest trade. The forest practices and production processes are followed keenly and demands of accountability and broader participation have become difficult to ignore. For the forest companies this means adjustment to the changing rules of the global game: the previously excluded costs of production are now becoming part of the business. This might appear as a major threat for some companies, but it can also be regarded as a means to conquer new markets.

## To conclude

The analysis underlines the necessity to include the previously ignored eco-social costs of economic restructuring in the calculations of actor- and product-specific credibility. The forest industry is part of this reorientation, as the heated negotiations for the criteria and certificates of sustainability suggest. The main forest companies – as the key actors of change – have become embedded in a global ranking competition that tends to keep the new eco-social openings in the margins.

We are therefore left with some critical dilemmas. Volume-based expansion through mergers has become the guiding principle for the forest-industrial globalisation, but not without obvious exceptions. There still is life behind the main actors of the global stock markets, including some entrepreneurial creativity, as the profiles of Ahlstrom and Myllykoski indicate. But how to secure the variety in the future, if the large companies keep eating the small ones with some financial attractiveness? The question is also important to peripheral forest resource communities, such as the provinces of the so-called Forest Finland: what is left of the regional (horizontal) dynamics when

these provinces become thoroughly integrated in the companies with global vertical power and, accordingly, are located in the New Wood Order as producers of pulp and bulk?

On the other hand, the growing shareholder interest in forest-industrial operations can also provide an alternative to the older managerial model of decision-making, as the UPM-Kymmene–Champion International case in the spring of 2000 demonstrated. This episode was an important lesson for the Finnish partners and it underlined the practical power of shareholders. Inevitably, it made the managers of the Finland-based companies more sensitive to the voices of the ‘external’ owners. The lesson can hence be taken as a sign of emerging socio-cultural pluralism – shareholder democracy – in the forest-industrial goal formulation. The floor is at least open to broader representativeness, including socio-ecological views, as UPM-Kymmene has witnessed during the past few years.

Clearly, the managers of the Finnish forest industry – as those of the forest sector in general – have much to learn from the experiences gathered during the first years of intensive globalisation. The ‘Finnish model’, however, undoubtedly contains much that is also worth exporting. The long history of society–company negotiations and environmental pressures have left their mark on the domestic forest know-how. These experiences should decidedly be integrated in the current global learning process. It is already evident that, along the globalisation, the Finnish model – or the Nordic model in general (see Lehtinen 2001b) – is increasingly challenged by the North American and Tropical counterparts which differ considerably from their regulative norms and measures typical of the Nordic countries. Little debate has emerged about the comparative pros and cons between the models, however. There is no clear idea to what degree the Finnish companies are exporting their model and to what degree they are adopting the models and cultures of the target countries. Not much is known about the actual compromises of the competing approaches.

The intensive globalisation of the Finnish forest companies nevertheless forces us to face the transcontinental comparative settings. The process simultaneously expands and shrinks the world and demands its residents to take a stance on the local–global dynamics and eco-social transformations. From a geographical point of view this is indeed a challenging horizon.

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