



Dynamics of the Debate on Thoughts on the Log Export Ban Policy in Indonesia

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Abstract

The Indonesian government has implemented a ban on log exports in two periods, during which time pro and contra parties have emerged. These groups have generated ongoing debates regarding the policy from 2013 to the present. This study aims to analyze the dynamics of these debates using the ACF concept. A total of 37 key informants from ministries, associations, NGOs, and scholars were interviewed using snowball sampling. Data were analyzed using a qualitative method and scoring of a five-point scale to identify each actor's stance on the log export ban policy. The results showed the presence of two opposing coalitions and one ministry acting as a mediator between them. Interests, discourse on log values, belief systems, and networks in each coalition drive the formation of these two coalitions. Debates surrounding the log export ban policy are likely to persist as long as these differences remain. Therefore, the Coordinating Ministry of Economic Affairs, as the policy mediator, should mediate and create rules that are mutually agreed upon and implemented jointly by all stakeholders. The Ministry of Forestry, with its coalition, must encourage meetings at the ministerial level, if necessary, in limited meetings with the President of the Republic of Indonesia.

Keywords: advocacy coalition, ban policy, log export, policy subsystem

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Introduction

The Indonesian government first implemented a policy of banning log exports in the 1980/1992 period. The ban in the early 1980s successfully developed the plywood and sawn wood industries and changed Indonesia from being the largest exporter of tropical logs worldwide to a major exporter of processed wood. This condition led to a rapid increase in the production and exports of processed wood; however, this policy reduced real foreign exchange earnings from exports of wood products (Fitzgerald, 1986; Sidabutar, 1988; Manurung, 1995). This finding is reinforced by the results of a simulation of the Indonesian wood product market during the 1981–1989 period, which showed that implementing the ban on log exports reduced Indonesia's total real foreign exchange earnings from wood products by 14% compared to a scenario without a ban (Manurung & Buongiorno, 1997). The results also align with another study, which reported that the calculation of net gain/loss during the 1985/1998 period showed that the policy of banning log exports caused a net loss for Indonesia. The losses of the government and log producers were not offset by the overall income of the domestic wood processing industry (Parnala et al., 2004).

After this period, the government reimposed a log export ban in 2001. This policy aimed to ensure that added value from processing logs could be obtained domestically and to increase foreign exchange earnings from exports of processed wood. The second phase log export ban was enacted through a Joint Decree (*Surat Keputusan Bersama/SKB*) of the Minister of Forestry Number 1132/Kpts-II/2001 and the Minister of Industry and Trade Number 292/MPP/Kep/10/2001 dated 8 October 2001. The government then strengthened this decree through Government Regulation Number 34 of 2002 concerning Forest Management and Preparation of Forest Management Plans, Forest Utilization, and Use of Forest Areas, which was replaced by Government Regulation Number 6 of 2007 in conjunction with Government Regulation Number 3 of 2008 on Forest Management and Preparation of Forest Management Plans and Forest Utilization. The gain/loss in the 2001/2013 period indicates that the government will experience greater losses than those experienced in the previous period (Parnala et al., 2004).

Currently, the log exports ban policy is regulated by Minister of Trade Regulation Number 45/2019 concerning Export Prohibited Goods, which replaced Minister of Trade

Regulation Number 44/M-DAG/PER/7/2012 concerning Export Prohibited Goods. Prohibited export goods are those that cannot be exported. The determination of such goods is based on several considerations: 1) to protect national security or public interests, including social, cultural, and public morals; 2) to protect intellectual property rights; and/or 3) to protect the health and safety of humans, animals, fish, plants, and the environment. In addition to the export ban policy, the government has also set export restrictions. The government has implemented this restrictive policy for various reasons, including protecting infant industries, addressing unfair competition, responding to low environmental standards and human welfare, making efforts to increase foreign exchange earnings from exports of processed wood, expanding employment opportunities in the forest products industry, increasing added value, and promoting regional economic development (Simangunsong & Nugroho, 2013).

Several studies have produced inconclusive results, indicating that log export bans may reduce deforestation rates but may also hinder the implementation of sustainable wood harvesting activities (Dean, 1995; Barbier & Rauscher, 1998). A log exports ban may increase employment opportunities and create new jobs; however, the effect is not significant compared to the loss of income from the forestry industry (Perez-Garcia et al., 1997). These new job opportunities tend to decrease due to increasing environmental degradation (Dean & Gangopadhyay, 1997).

An example from China shows that China's logging ban in natural forests (hereafter referred to as the logging ban) benefits domestic natural forest conservation but imposes uncertainties on the stability of the timber import trade network (hereafter referred to as network stability). Determining the effect of the logging ban on China's network stability is essential for developing effective timber trade policies and sustainable forest management. The results reveal that the logging ban adversely affects China's network stability by affecting resource sourcing and cost stability (Zhang et al., 2025).

Another example examines the impact of log export ban (LEB) adoption on the employment of 1,739 wood processing firms surveyed between 2006 and 2018 across 74 developing countries (Marchand & Zerbo, 2025). Using an entropy balancing approach, the results suggest that LEB policy adoption significantly increases total employment in firms located in adopter countries compared to those in non-adopter countries. These findings indicate that LEB implementation significantly increases production employment, permanent employment, and unskilled labor, while it does not exhibit a statistically significant impact on non-production employment, temporary employment, and skilled labor (Marchand & Zerbo, 2025).

The log export ban policy is strongly suspected to contribute to the decline in the added value of wood products. The creation of added value usually begins with the process of selecting and grading raw products. Processing is conducted to add value to by-products or products that cannot be consumed directly or to generate better profits compared to raw products (Nurrochmat, 2017). Such processing can prevent the misallocation of prime quality roundwood. However, due to the log export ban policy and sawn wood,

prime-quality logs are often processed into smaller-sized products with significantly lower prices.

Gross domestic income in the forestry subsector from 2006 to 2015 shows a declining trend, despite the substantial potential of raw materials for wood-based forest products. Selecting appropriate forest products can maximize the potential of the timber trade in Indonesia, leading to higher-value sales. This approach is expected to increase the export value of timber forest products by adjusting policies with market conditions and considering demand from both domestic and international markets (Lantera, 2017).

In general, processed wood products derived from the meranti group yield the highest added value when sold as sawn timber, whereas the plywood industry is economically viable only when using raw materials from mixed forest wood (Lantera et al., 2018), including wood from garden replanting (Nurrochmat et al., 2017). Particleboard products are only suitable for production from wood waste or flake raw materials (*Bahan Balu Serpih*/BBS). The luxury wood group, including teak, achieves the highest added value when sold as furniture. For round wood, margins in the international market are higher than in the domestic market; for mixed forest wood and luxury wood, margins are three times higher, while for meranti wood they are about 2 times higher (Nurrochmat et al., 2017).

Differences in perspective regarding the log export ban policy have given rise to debates involving various parties, making this phenomenon important to examine. These debates are driven by contrasting arguments, including low domestic roundwood prices compared to international prices (price distortion), which depress upstream business conditions, and opposing views emphasizing the need to ensure raw materials for downstream industries. These narratives are supported by academic studies advocating the reopening of log exports, as well as arguments from parties supporting the continuation of the ban. Such pros and cons have led to ongoing debates since 2002, which have intensified since 2013. Various parties have expressed discourses, narratives, beliefs, and interests to support their positions through forums such as meetings, FGDs, workshops, reviews, official letters, and print or online media.

One framework used to understand the debates among multiple parties is the Advocacy Coalition Framework (ACF). Since its development in the 1990s, ACF has become the most influential approach to public policy (Sabatier, 1988). It is also one of the useful frameworks for analyzing public policy (Schlager, 1995; Schlager & Blomquist, 1996; Johns, 2003), particularly during periods of policy stability (Mintrom & Vergari, 1996). However, previous studies indicate that ACF has limitations, which are relevant when examining debates on the policy banning log exports. The framework often relies on retrospective perspectives of events occurring a decade or more earlier and is typically implemented through questionnaires and interviews to analyze political conflicts and policy changes. Its application is time-consuming and costly; therefore, researchers are advised to conduct rapid qualitative ACF analysis of policy subsystems using informal interviews, as well as document and report analysis (Fischer et al., 2014). The Tripa case study shows that a social-ecological coalition of NGOs can

significantly influence land-use decisions and management. However, this outcome required sustained engagement over more than a decade in a complex policy environment (Ruysschaert & Hufty, 2020).

The debate surrounding the log export ban policy occurs through interactions among actors. In this context, policy formulation is not only concerned with technical issues and accurate information on fairly clear targets but also features conflicts between involved actors (Kartodihardjo, 2008). Actors' attitudes and policy changes are shaped by relatively fixed sharing belief systems (Sabatier, 2007). A belief system is defined as a set of basic values, causal assumptions, and perception that influence how individuals acquire, select, and use information. Policy actors seek allies who share core policy beliefs and coordinate their actions in advocacy coalitions to increase their chance of success (Sabatier & Jenkins-Smith, 1999). Such contestation generates policy outcomes that may evolve, offering lessons from the process (Kartodihardjo, 2017).

The ACF requires a hypothesis that a policy must have been in force for at least a decade. The ban on log exports in Indonesia has been in effect for 18 years; therefore, the ACF framework can be applied in this research. The implementation of ACF is also strengthened by previous findings, which stated that the decision-making process of the Sustainable Production-Forest Management Certification (*Sertifikasi Pengelolaan Hutan Produksi Lestari/PHPL*) policy involves two coalitions with competing interests: Coalition A favors compliance with government regulations, while Coalition B, involving the international timber market, supports certification based on conformity with sustainable forest management standards and criteria (Arshanti et al., 2017). The ACF emphasizes collective belief and the role of knowledge in environmental policy studies (Litfin, 2000). For instance, a study on water quality in Lake Tahoe, United States, identified two coalitions: one supporting development and the other prioritizing water quality (Sabatier & Pelkey, 1990).

The ACF provides a framework to understand the debate process surrounding the log export ban policy, policy dynamics, influencing parameters, and coalition formation. Based on the background and problems above, this study aims to understand the dynamics of debates on Indonesia's log export ban. The specific objectives are to: 1) analyze the dynamics of the log export ban policy; 2) analyze the surrounding log export ban policy using ACF as an analytical framework; and 3) analyze the advocacy coalitions' formation in these debates.

Methods

This research was conducted at the offices of relevant institutions and ministries involved in the dynamics of the debates over the policy banning log exports in Indonesia. These included the Coordinating Ministry for Economic Affairs, the Ministry of Environment and Forestry (now the Ministry of Forestry), the Ministry of Trade, the Ministry of Industry, Perum Perhutani, Inhutani, Timber Associations, NGOs, and business players. The study was conducted for six months, from October 2018 to March 2019. A total of 37 key informants were interviewed, representing 24 entities,

including government agencies (ministries and institutions), state-owned forestry companies, timber associations, forestry business actors, NGOs, academics, and researchers. The list of key informants and their affiliated institutions is shown in Table 1. The key informants were selected using the snowball sampling technique with quota control, whereby subsequent informants were identified based on recommendations from initially selected informants (Sugiyono, 2007). Key informants were individuals with relevant knowledge and understanding of the policy banning log exports in Indonesia, based on their role, knowledge, involvement, communicativeness, and willingness to conduct interviews. The process of selecting key informants involved three stages: a) selecting initial informants with direct relevance to log export ban policy in Indonesia; b) selecting additional informants to expand the scope of information and explore issues related to research focus; and c) stopping the selection process when no new variation or additional information emerged, indicating data saturation, and when further interviews were likely to yield similar information to that already obtained (Bungin, 2009).

Data were collected through a study on secondary sources, interviews, and observations using a qualitative-descriptive design involving the following strategies: a) Collection of qualitative documents: These include public documents (such as laws and regulations, print media reports, papers, and activity reports) or private documents (such as letters and emails). The collected documents relate to the log export ban policy and other regulations on timber trade, including laws, government regulations, ministerial regulations, decrees, and activity reports; b) Qualitative interviews: Researchers conducted face-to-face, in-depth interviews with key informants with knowledge and competence on the log export ban policy, as well as interviews by telephone and participation in focus group discussions. The interviews employed unstructured, open-ended questions to elicit informants' views and opinions; c) Qualitative observations: Qualitative observations involve research directly into the field to watch the behavior and activities of individuals at the research location. Observations generally focused on aspects of the debate with key informants, asking general questions related to the log export ban policy, allowing key informants to freely and openly express their views (Creswell, 2016).

All data were analyzed using the ACF Framework and its parameters. This framework explains that a policy functions within a policy subsystem, which both influences and is influenced by a broader social context. The ACF classifies this context into two categories: relatively stable parameters and external parameters (events) (Sabatier & Jenkins-Smith, 1999). In this study, ACF parameter analysis was performed to understand the interactions among components that may influence belief and policy changes within policy subsystems (Sabatier & Jenkins-Smith, 1993; 1999), namely: 1) relatively stable parameters; 2) external parameters (events); and 3) policy subsystems, determined by territorial boundaries, main topics, and diverse policy actors across government levels, interest groups, research institutions, and the media. These parameters, as applied in this research, are shown in Figure 1.

Table 1 List of names of key informants and their insitution of origin

Institution of origin	Amount of key informants
Assistant Deputy/Director/Head of Sub-Directorate at Minister:	
a. Coordinating Ministry for Economic Affairs	1 person
b. Ministry of Environment and Forestry	2 persons
c. Ministry of Trade	1 person
d. Ministry of Industry	1 person)
Chairman or Vice Chairman or Secretary General of the Timber Association	
a. Indonesian Forestry Entrepreneurs Association (Asosiasi Pengusaha Hutan Indonesia/APHI)	5 persons
b. Indonesian wood panel association (Asosiasi Panel Kayu Indonesia/ APKINDO)	2 persons
c. Indonesian Sawmill and Woodworking Association (ISWA) (Asosiasi Pengusaha Kayu Gergajian dan Kayu Olahan Indonesia/APKGOI)	1 person
d. Indonesian Lightwood Association (ILWA)	2 persons
e. Indonesian Furniture and Craft Industry Association (Himpunan Industri Mebel dan Kerajinan Indonesia/HIMKI)	1 person
f. Indonesian Pulp and Paper Association(Asosiasi Pulp dan Kertas Indonesia/APKI)	1 person
g. Indonesian Furniture Industry and Handicraft Association (Asosiasi Industri Permebelan dan Kerajinan Indonesia/ASMINDO)	1 person
Chairman of Non Government Organization	
a. Independent Forestry Monitoring Network (Jaringan Pemantau Independen Kehutanan/JPIK)	1 person
b. Kaoem Telapak	1 person
c. Forest Watch Indonesia (FWI)	1 person
Directors or Management of forest utilization business holders (PBPH)	
a. Company of Nusa Pala Nirwana	1 person
b. Company of Sumalindo Lestari Jaya	1 person
c. Company of Ratah Timber	1 person
d. Company of Korindo Group	1 person
e. Company of Kayu Lapis Indonesia Group	1 person
f. Company of Roda Mas	1 person
Directors of Business License Holders for Forest Utilization and Advanced Industry (PBPHH)	
a. Company of Phlinesia International, Primary Industry	1 person
Perum Perhutani (State-Owned Forestry Company)	3 persons
Board of Directors of Inhutani IV	1 person
Board of Directors of Inhutani V	1 person
Researcher in the field of timber trade policy	1 person
Academic in the field of log export policy and forest management	3 persons

Note: The names of informants were entered in the research database (2019).

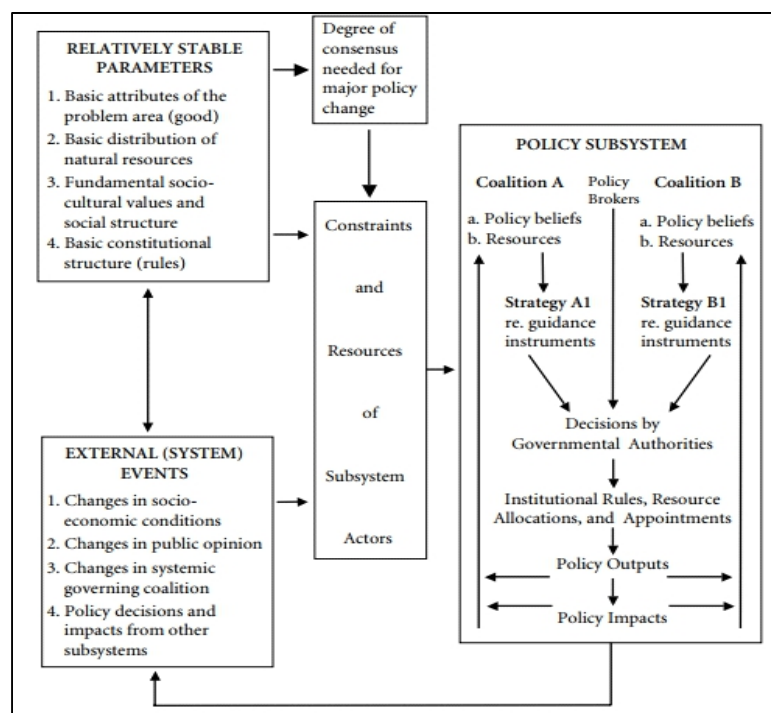


Figure 1 The advocacy coalition framework (Sabatier & Jenkins-Smith, 1999).

The ACF proposes several assumptions and hypotheses within the policy subsystems: 1) individual models, cognitive abilities, motivations, and beliefs of policy participants; although individuals are rational, their ability to understand complex issues is constrained by limited cognitive capacity (Simon, 1985); 2) advocacy coalition constitutes policy participants who share core beliefs and are involved in coordination (Sabatier & Jenkins-Smith, 1999); 3) policy brokers or mediators, referring to participants who act as neutral mediators; 4) resources, which enable actors to formulate policy-influencing strategies across various arenas, including: a) formal legal authorities, b) public opinion, c) information, d) mobilizable forces, e) finance, and f) seasoned leadership (Sabatier & Weible, 2005); and 5) arenas, referring to the place where the policy-influencing coalition operates.

The tendency of the actor's perspective was scored on a five-point scale (1 to 5) according to the level of support for or rejection of the log export ban policy. A higher score (4 or 5) indicates stronger actors' support for the ban on log exports, while smaller scores (1 or 2) indicate stronger opposition. Meanwhile, a score of 3 represents neutral actors as mediators. The scoring criteria are as follows: (1) = strongly reject the log export ban policy, (2) = reject the log export ban policy, (3) = neutral (mediator), (4) = support the log export ban policy, and (5) = strongly support the log export ban policy.

The score points were obtained from analyses of study results, official letters, online media news, interview results, press releases, FGDs, and policy documents from 2008 to 2019 by actors in agencies and ministries regarding the ban on log exports in Indonesia. The scoring for each actor was determined by the first researcher based on interview and

supporting data. The results were validated by other researchers to ensure high accuracy. Agencies or ministries and data sources used for analyzing actors' perspectives are shown in Table 2.

Results

Period of the log export ban policy The dynamics of the log export ban policy are influenced by the politics behind government regulations. The log export ban in the first period is regulated under the Joint Decision Letter (*Surat Keputusan Bersama/SKB*) of the Ministry of Forestry and the Ministry of Industry and Trade, while the log export ban in the second period is based on the Regulation of the Ministry of Trade. Therefore, the dynamics of the log export ban policy are divided into two time periods: the 2001–2012 period and the period of 2012–present. Those periods were separated by changes in the legal basis for the log export ban and the power politics underlying the discourse and interests of the respective actors. The log export ban continued to be enforced because the government considers it appropriate for promoting downstream industries, increasing added value, and ensuring the supply of raw materials for the wood processing industry. A summary of these periods is explained as follows.

The period 2001–2012 The enforcement of this ban on log exports is based on the Joint Decision Letter (*Surat Keputusan Bersama/SKB*) from the Ministry of Forestry and the Ministry of Industry and Trade, which was issued on October 8, 2001, to prohibit the export of logs and wood chips. This joint policy regulates the closure of timber exports from all over the territory of the Republic of Indonesia, effective until a yet-to-be-determined date.

Table 2 Institutions/ministries and sources of data in analyzing actors' thoughts tTendency on log export ban policy in Indonesia

No	Involved actors	Sources of data
A Central Government		
1	Corruption Eradication Commission (KPK)	Study results, online media news
2	National Development Planning Agency (BAPPENAS)	Study results
3	Ministry of Environment (Ministry of Forestry)	Study results, online media news, interview results, official letters, FGDs
4	Ministry of Industry	Study results, online media news, official letters, content analysis
5	Ministry of Trade	Study results, online media news, interview results, FGDs, content analysis
6	Coordinating Ministry for Economic Affairs	Study results, coordinating meetings between ministries
7	Perum Perhutani	Online media news, interview results
8	Inhutani	Interview results
B Timber Associations		
1	Indonesia Forest Concession Holders (APHI)	Study results, online media news, interview results, official letters
2	Indonesian Wood Panel Association (APKINDO)	Online media news, interview results
3	Indonesian Sawmill and Woodworking Association (ISWA)	Online media news, interview results, official letters
4	Indonesia Light Wood Association (ILWA)	Online media news, interview results, official letters, content analysis
5	Indonesian Pulp and Paper Association (APKI)	Online media news, interview results
6	Indonesian Furniture Industry and Handicraft Association (ASMINDO)	Online media news, interview results, official letters
7	Indonesian Furniture and Craft Industry Association (HIMKI, formerly AMKRI)	Online media news, interview results
C NGOs		
1	NGO Kaoem Telapak and Independent Forestry Monitoring Network (JPIK)	Online media news, interview results, press releases
2	Forest Watch Indonesia (FWI)	Online media news, interview results, press release
3	Forum for the Forestry Environment (WALHI)	Online media news
4	Greenpeace	Online media news

The log export ban policy was created to stop illegal logging and trading, which take advantage of the log/wood chip export rules and harm forest conservation and the environment. The government issued the second log export ban policy in 2001, which has remained effective for 18 years, following the expiration of the previous policy implemented from 1980 to 1992. Previous research reported that forest entrepreneurs and conservationists consider the log export ban a relatively straightforward measure to combat illegal logging, as most illegally harvested logs are intended for export (Resosudarmo & Yusuf, 2006).

The log export ban policy is supported by various non-government organizations (NGOs), which are concerned about the high deforestation rate in Indonesia, attributed to illegal log exports (Environmental Investigation Agency & Telapak, 2002). Support also comes from entrepreneurs in the timber processing and manufacturing industry, especially in the plywood industry, in response to robust competition from China on the world market. Indonesian entrepreneurs believe that significant inputs for the timber processing and manufacturing industry in China originate from Indonesia (Gellert, 2005).

The government consolidated the Joint Decision Letter with Government Regulation Number 34/2002 dated June 8, 2002, on Forest Governance and Forest Management Planning, Forest Utilization, and Forest Area Use. The government regulation was issued in the implementation of Law Number 41/1999 on Forestry. The ban on log exports under the government regulation above is mandatory, as Article 76 stipulates that “forest products in the form of log and wood chip raw materials are banned from being exported.” This article assigns the the authority of forest products export regulation to the ministry responsible for trade, based on a proposal of the Minister of Forestry.

The government also banned exports of rail-bearing timber and sawn timber due to forest destruction and widespread illegal log exports. This policy is issued in the Joint Decision Letter of the Minister of Forestry Number SK.350/Menhut-VI/2004 and the Minister of Industry and Trade Number 598/MPP/Kep/9/2004 on Banning Exports of Rail Bearing from Timber and Sawn Timber.

The government has implemented a soft-landing policy (reduction of felled wood production allocation) since 24 July 2003 to control forest potential. In 2003, the timber production allocation of 6.89 million m³ was reduced into 5.74 million m³. The government also reduced the timber production allocation from Perhutani's forests from planned production of 1.30 million m³ to 0.93 million m³. The forest industry condition back then limited the supply of raw material from natural forests, considerably requiring acceleration of industrial plant forest (HTI) development.

Log production from natural forests was at the bottom point in 2001, with production lower than 2 million m³, and then increased above 6 million m³ until 2011 (Badan Pusat Statistik, 2018; Kementerian Lingkungan Hidup dan Kehutanan, 2019). The implementation of the soft-landing policy and the decrease in the number of forest concessions (HPH) from 351 in 2001 to 295 in 2011 also lowered the log production. The HTI development improved from 94 units in 2003 with production of 6 million m³ to 249 units in 2011 with production of nearly 20 million m³. The growth of HTI

development served as one of the government priorities for the fulfilment of log raw material demand and reduction of pressure on natural forests.

The period 2012–present This period commenced with the establishment of Regulation of the Minister of Trade Number 44/M-DAG/PER/7/2012 on Goods Subject to Export Ban, later amended by Regulation of the Minister of Trade Number 45/2019 dated June 11, 2019, on Goods Subject to Export Ban. Goods subject to export ban are those prohibited from export. The goods subject to the export ban are determined based on the following reasons: a) to protect the national security or public interest; b) to protect intellectual proprietary rights; and/or c) to protect the health and safety of humans, animals, fish, plants, and the environment. The amendment of the log export policy under Regulation of the Minister of Trade Number 44/M-DAG/PER/7/2012 with Regulation of the Minister of Trade Number 45/2019 on Goods Subject to Export Ban does not substantially change the provisions regarding forest products subject to export restrictions.

The government reinforced the industrial and trade sectors by enacting the Law of the Republic of Indonesia Number 3/2014 on Industry and the Law of the Republic of Indonesia Number 7/2014 on Trade. The former aims to promote downstream programs of high added-values and greater multiplier effect, while the latter supports the implementation of economic democracy through trade activities.

The Ministry of Forestry intensified discussion on the proposal to reopen log exports in 2013 after two reviews by the Expert Team on HTI forest log exports and natural forest log exports. Scientific and expert communities, with specialized knowledge, played a role in these reviews (Kartodihardjo, 2017). Opponents of the proposal also conducted discussions and reviews to create counter-discourses (Institute of Development Studies, 2006), which are delivered through meetings, mass media, and FGDs.

In addition to supporting the state's revenue, production forests also become an integral part of the Indonesian government's commitment to achieving the Sustainable Development Goals (SDGs). Intensive silviculture (SILIN) and reduced impact logging (RIL) are intensified to improve forest utilization. The implementation of the Timber Legality Assurance System (*Sistem Verifikasi Legalitas Kayu*/SVLK) is also crucial in improving forest products governance and competitiveness on the international market.

The production of natural forest logs slightly decreased in 2012, with production exceeding 5 million m³, and then surged in 2018 to 7 million m³, which marked the highest production (Badan Pusat Statistik, 2018; Kementerian Lingkungan Hidup dan Kehutanan, 2019). The continuous fall of the number of HPH from 294 units in 2012 to 254 units in 2018 also influenced the decrease of log production, in addition to another factor of low log price on the domestic market.

Perhutani reduced the teak log price to USD260–400 m³ from an initial USD930–1,650 m³ to stimulate demand (online news from bisnis.tempo.co, dated November 24, 2017). The APhi stated that domestic log stocking widens the gap between domestic and international log prices: the

domestic price averaged USD120–150 m³ (*meranti* timber), while the international price was approximately USD300 m³ (2–3 times the domestic price) (online news from *ekonomi.bisnis.com*, dated March 7, 2018). The prices of *meranti*, *nyatoh*, and *keruing* logs in the last five years averaged IDR1.6–2.0 million m³, while *bangkirai* logs reached the highest price of IDR3.5 million m³ (source: processing of the trade data of an HPH on Kalimantan of 2015–2019).

The HTI development relatively increased from 238 units in 2012, with a log production of 20 million m³, to 295 units in 2018, with a production of 40 million m³. However, the average HTI planting remained low at 0.31 million hectares annually (Badan Pusat Statistik, 2018; Kementerian Lingkungan Hidup dan Kehutanan, 2019). This HTI development remains a priority to the government to fulfill log raw material demand and reduce pressure on natural forests. The price of HTI logs on the domestic market is USD20–25 m³, while on the international market it is USD65 m³.

The results of the research data analysis for the two periods, based on the application of the ACF parameters, are shown in Table 3. Further analysis of the research data in both periods was conducted to obtain each actor's tendency and its score. The results are presented in Table 4 and Figure 2. The formation of advocacy coalitions in this debate is presented in Table 4 and Table 5.

Discussion

The ACF application in thoughts on the log export ban policy in Indonesia Stable parameters in Table 3 place upstream forest enterprises under pressure, limit available

sources due to differing objectives and perspectives on the log export ban policy, establish rules and procedures for policy change and collective decision-making, such as granting wider legal access to the community, and frame the values underlying the policy's reinforcement. External parameters play a vital role, as they often divert public attention to or away from policy subsystems, as shown in Table 3. Despite their importance, relatively stable parameters are resistant to change and therefore are generally not the primary strategic focus of policy participants (Sabatier & Jenkins-Smith, 1993; 1999).

External parameters occupy a vital position as they often divert public attention to or away from policy subsystems (Sabatier & Jenkins-Smith, 1993; 1999). This statement aligns with the results shown in Table 2, indicating that the changes in socioeconomic parameters are important, particularly due to a high level of illegal logging activity and competition among domestic log producers. Changes in public opinion parameters are important for gaining support in the debates. In contrast, changes in systemic governing coalition parameters are less significantly influential, while the policy decisions and impacts parameters initially regulated under the Ministerial Joint Decision Letter, then under a Regulation of the Ministry of Trade, remain unprofitable for upstream forestry entrepreneurs.

Policy subsystem Policy participants seeking to influence policy focus on policy subsystems to effectively reach their goals, sustain long-term engagement, and ensure goal attainment (Sabatier & Jenkins-Smith, 1999). Debates on the log export ban policy have occurred in several arenas: meetings, FGDs, workshops, print/online media, official

Table 3 Summary of the applying of the ACF parameters

Relatively stable parameters			
No	Parameters	Description	
1	Basic attribute of the problem area	The log export ban policy has been in effect for roughly 18 years, putting upstream forestry enterprises under pressure (low log price).	
2	Basic distribution of natural resources	Differences in objectives and perspectives in the implementation of the log export ban policy as a result of conflict of interest and relationship between parties	
3	Fundamental cultural values and social structure	An increasing rate of forest damage and high level of timber smuggling/trafficking because of the locals' persistently high dependence upon forest timber products and poor legal access to the forests	
4	Basic constitutional structure	Alterations in the prevailing regulations reflect legal reinforcement, from a Joint Decision Letter to Regulation of the Ministry of Trade Number 44/2012 on Goods Subject to Export Ban, coupled with Government Regulation Number 34/2002, Government Regulation Number 6/2007 jo. Government Regulation Number 3/2008	
External parameters			
		2001–2012	2012–present
1	Changes in socio-economic conditions	Efforts to subdue illegal logging and timber trafficking in order to reduce the state's loss	Increasingly intense competition between log producers on the domestic market with low log price
2	Changes in public opinion	Available assurance of raw material fulfilment for the wood processing industry	Reimprovement of plywood and furniture exports
3	Changes in systemic governing coalition	Collectively governed by the Department of Forestry and the Department of Industry and Trade	Governed by the Ministry of Trade on the input from technical ministries (forestry and industry)
4	Policy decisions and impacts	Determined with SKB; impacts of the policy can minimize forest damage and increase forest (HTI) cover.	Determined with Regulation of the Ministry of Trade on Goods Subject to Export Ban; to upstream forestry entrepreneurs this policy is unprofitable.
Government policy direction		Ban on exports for logs and wood chips and for rail bearing from timber and sawn timber	Export ban for the following forest products: logs, rough timber, hopwood, split poles, rail bearing, sawn timber, whole rattan, core rattan.

Source: Data processing from interviews with informants (2019).

Table 4 Actors' thoughts tendency in the debate of the log export ban policy

No.	Actors	Tendency of thoughts	Score
A Central Government			
1	Corruption Eradication Commission (KPK)	KPK's Research and Development revealed a potential corruption gap in the forestry sector. One of the findings apparently is linked to the log trade policy. The currently applicable log export ban is prone to give a partial treatment to a certain industry to dominate the timber market, and, thus, it is suggested to review and open the log export potential in a limited way.	2
2	National Development Planning Agency (BAPPENAS)	The BAPPENAS reviewed the depleted stock of logs which created a gap between the demand and supply of logs for the industry. This, in turn, decreased the Non-Tax State Revenue (PNBP) in the forestry sector, either from the Reforestation Funds (DR) or from the Forest Resources Provision (PSDH). The reasons were as follows: degraded forest quality, the policy of decreased natural forest felling allocation (soft landing), the market-distortion-causing log export ban policy, and global market dynamics against changes in wood products demand due to environmental and social issues.	3
3	Ministry of Environment (Ministry of Forestry)	The Ministry of Environment and Forestry proposed the lift of the log export ban, the study of the log export policy enforcement (limited), especially in the case of logs from industrial plant forests, and the increase in the cross-sectional areas of exportable <i>merbau</i> processed wood assortments at a minimum of 30,000 mm ² and non- <i>merbau</i> at a minimum of 20,000 mm ² .	1
4	Ministry of Industry	The Ministry of Industry is of the view that the log export opening policy has yet to be relevant as the domestic wood processing industry is still in need of a sizeable amount of log raw materials. The log export ban policy is important as it supports the downstream programs with a continuously increased added value, gives a greater multiplier effect, and absorbs more manpower.	5
5	Ministry of Trade	The Ministry of Trade as the regulator of timber trade policies remains consistent with the log export ban policy on the grounds that, to the present, this policy is still effective in maintaining the domestic timber raw material supply and providing an added value to the industry.	5
6	Coordinating Ministry for Economic Affairs	The Coordinating Ministry for Economic Affairs becomes a mediator between the parties for and against the log export ban policy. It supports a thorough study on the proposal of the log export policy deregulation and the log supply/demand for the domestic industry by an independent team.	3
7	Perum Perhutani	Perum Perhutani as a State-Owned Company (BUMN) and producer of logs basically agrees with the opportunity to open a foreign market as it will allow the company to sell logs of certain specifications and give it a satisfactory amount of income by following the applicable regulations.	2
8	Inhutani	Inhutani, as a subsidiary of Perum Perhutani, basically follows the policies set up by the government, and, as a log producer, agrees with the government policies to push the log price up.	2
B Timber Associations			
1	Indonesia Forest Concession Holders (APHI)	The APHI backs up the selective opening of the log export tap to allow the upstream forestry enterprises to survive by achieving a high added value. On the domestic market, the APHI declared, the selling price of wood from natural forests is only 50% of the world market price. The low selling price on the domestic market suppresses business players in the upstream forestry field as the price is incapable of offsetting the increase in the production costs. Hence, extension of the timber market and wood product access by opening the log export tap on a selective, limited basis is deemed necessary.	1
2	Indonesian Wood Panel Association (APKINDO)	The APKINDO objects the proposal of the log export opening. From its point of view, HTI development should be optimized and supported by all parties in order to produce log raw materials at a lower cost without degrading the quality. The government must establish a policy that assures the availability of log raw materials.	4
3	Indonesian Sawmill and Woodworking Association (ISWA)	The ISWA firmly rejects the log export policy. Most of its members are labor-intensive Small and Medium Enterprises (SMEs) across Indonesia which certainly will be affected due to the depletion of log raw materials. This policy will also drive many businesses in the wood processing industry to their ends, eventually causing a large scale of employment termination and triggering social vulnerability.	5
4	Indonesia Light Wood Association (ILWA)	The ILWA still supports the implementation of Regulation of the Minister of Trade No. 44 of 2012, which prohibits the exports of raw materials in the form of logs and sawn timber and constantly supports the government policies in the effort to improve the added value of domestic products by processing raw materials into finished products in accordance with Law No. 3 of 2014 on Industry.	5
5	Indonesian Pulp and Paper Association (APKI)	The APKI persistently supports the implementation of the log export ban policy to make sure of the satisfaction of pulp and paper raw materials. However, the fact that this policy has driven down the price of pulp from logs for paper-making leads to a claim of counter available subsidy and eventually to accusation of subsidy for paper products on the log export ban policy.	4
6	Indonesian Furniture Industry and Handicraft Association (ASMINDO)	The ASMINDO rejects the log export opening proposal. The competitiveness of Indonesian furniture and woodcraft products on the global market has increasingly weakened. The opening of log exports is analogous with handing the competitors (China, Vietnam, etc.) with bullets. Besides, the weak oversight and law enforcement in Indonesia at large provides irresponsible parties with an opportunity to illegally export logs in a seemingly legal way.	5
7	Indonesian Furniture and Craft Industry Association (HIMKI, formerly AMKRI)	The HIMKI opposes the log export opening proposal. It is feared that the log export opening will kill domestic woodbased industries and ultimately increase the rate of employment termination since the furniture and woodcraft industry's needs are highly dependent upon the availability of logs on hand. The important portion of log raw materials in the furniture and woodcraft industry production reached 60%.	5
C NGOs			
1	NGO Kaoem Telapak and Independent Forestry Monitoring Network (JPIK)	Kaoem Telapak and the JPIK reject the log export opening proposal as it may trigger widespread illegal logging and timber smuggling and give rise to a high rate of employment termination in the wood processing industry. During the log export ban period since 2001, log smuggling cases were still taking place on a large scale. The legal enforcement against these cases were deemed unable to get to the main perpetrators of the forest crimes.	4
2	Forest Watch Indonesia (FWI)	The FWI fears that the opening of log exports may trigger widespread illegal logging and forest destruction, the majority of which is the result of a corrupt political and economic system which regards the natural (forest) resources a source of income to be made use of for political and personal interests.	4
3	Forum for the Forestry Environment (WALHI)	The WALHI insists that the Ministry of Environment and Forestry must cease the log export reopening policy proposal. The wood management policy must be designed to meet the local and national wood needs, with the people being the subjects, through the social forestry service. The low log price is because the logs are circulated within a closed market that is controlled by just a few pulp and paper entrepreneurs. This monopoly leads to a saturation point of timber revenue capacity.	4
4	Greenpeace	Greenpeace supports the log export ban policy in the context of the Papuan land in the midsts of pressure from multiple parties in the timber industry to relax the policy implementation.	4

Score descriptor: (5) = strongly support the log export ban policy, (4) = support the log export ban policy, (3) = neutral (mediator), (2) = reject the log export ban policy, (1) = strongly reject the log export ban policy

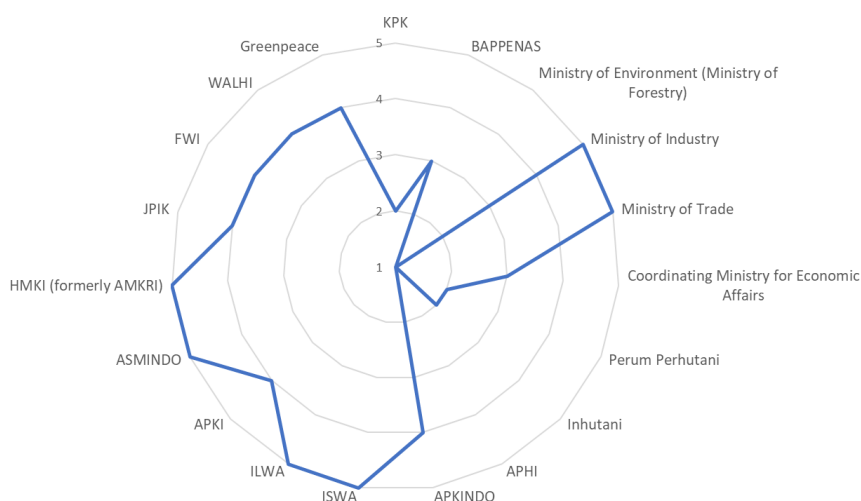


Figure 2 Actor's thoughts tendency in the debate of log export ban in Indonesia.

Table 5 Formation of advocacy coalitions

Advocacy coalitions	2001–2012	2012–2019
Advocacy coalition A (Favor the log export ban policy)	Department of Industry and Trade, Department of Industry, Department of Trade, APKINDO, ISWA, APKI, ASMINDO, AMKRI, FWI, Telapak, and Greenpeace	Ministry of Industry (Department of Industry), Ministry of Trade (Department of Trade), APKINDO, ISWA, ILWA, APKI, ASMINDO, HIMKI, FWI, Kaoem Telapak, JPIK, WALHI, Academics, and Researchers
Advocacy coalition B (Against the log export ban policy)	Department of Forestry, APhi, Perum Perhutani, and Inhutani	KPK, Ministry of Environment and Forestry (Ministry of Forestry), Perum Perhutani, Inhutani, APhi, Academics, and Researchers
Policy mediator	Coordinating Ministry for Economic Affairs	Coordinating Ministry for Economic Affairs

letters, and academic forums, as reflected in Table 4. The policy subsystem parameters consist of territorial scope (log trade), substantive scope (log export ban policy), and policy participants. These participants include the Coordinating Ministry for Economic Affairs, the Ministry of Environment and Forestry, the Ministry of Industry, the Ministry of Trade, the Corruption Eradication Commission (KPK), State-owned companies (BUMN) in the forestry sector (Perum Perhutani and Inhutani), Indonesia Forest Concession Holders (APhi), the Indonesian Wood Panel Association (APKINDO), the Indonesian Sawmill and Woodworking Association (ISWA), the Indonesia Light Wood Association (ILWA), the Indonesian Pulp and Paper Association (APKI), the Indonesian Furniture Industry and Handicraft Association (ASMINDO), the Indonesian Furniture and Craft Industry Association (HIMKI, formerly AMKRI), the Independent Forestry Monitoring Network (JPIK), NGO Kaoem Telapak, Forest Watch Indonesia (FWI), Greenpeace, the Indonesian Forum for the Environment (WALHI), academics, and researchers.

Actors utilize resources to formulate strategies for influencing policies across various arenas (Sabatier & Weible, 2005). The use of resources in the debates is characterized as follows: a) formal legal authority—parties who are for the log export ban policy have direct political access to timber trade policy regulators, serving as the main resource to the coalitions (Sabatier & Pelkey, 1987); b) information, possessed by each coalition, is used to support its members, counter opposing perspectives, and influence policymakers (Weible, 2006); and c) finance—a strong

financial condition enables actors to support review activities, meetings, FGDs, workshops, and think tank activities to generate information, reinforce their discourses and interests in the policy process, influence the public opinion, and mobilize the coalition supporters (Weible, 2006).

One mechanism of policy change is belief change via policy-oriented learning from gradual information accumulation, such as scientific research and policy analysis (Weiss, 1977). However, scientific evidence supporting parties opposing the log export ban has not led to successful policy change to date. ACF researchers may plan an active role in advocacy coalitions. As stated by Zafonte and Sabatier (1998), they can act as coalition members and play an important role in providing technical information to support policy-oriented learning and policy change. Debates on the log export ban policy have not yet generated a policy change due to a deadlock (Zartman, 1991).

Actors' thoughts tendency Parties supporting the ban on log exports present various views, interests, and discourses to oppose the opening of log exports, as shown on Table 3 and Figure 2. The main actors, the Ministry of Industry and the Ministry of Trade, state that the current policy promotes downstream development (as mandated by Law Number 3 on Industry), generating added value for domestic industries while ensuring the availability of raw material. Most timber associations belong to this coalition, with some actively expressing refutations in discussions on opening discourse, including ISWA, ASMINDO, and HIMKI.

ISWA delivered multiple letters rejecting log export proposals to the Ministry of Environment and Forestry, Ministry of Industry, and Ministry of Trade (as regulators), citing the importance of downstream development and enforcement of the log export ban policy, leading to a high rate of employment termination.

All the NGOs supporting this policy consider that the opening of the log export policy may trigger illegal logging, timber smuggling/trafficking, and forest destruction that leads to degraded biodiversity. The demand for logs can be supplied from sustainable sources, including forest plantations, thus reducing the threat of illegal logging and forest destruction. WALHI rejected the proposal to implement the log export policy, claiming that low log prices result from a closed domestic market controlled by a few entrepreneurs in the pulp and paper industry, monopolistic conditions, and reduced timber revenue. This condition confirms that the low log price is due to the log export ban policy. Despite sharing deep-core ideological commitments, the conflict was driven by differing policy-core beliefs (Qarakhani & Mirzaie, 2025) in this research.

Results from the interview indicated that downstream industry entrepreneurs usually need logs from community forests, rather than natural forests and industrial plant forests, for the industry's raw materials. However, if the limited log exports are permitted, there are concerns that logs from all sources will be exported. Some entrepreneurs who support the ban on log exports are presumed to only desire the current low log prices. For the pulp and paper industry, especially the one integrated with the raw material source (Industrial Plantation Forest/Hutan Tanaman Industri/HTI), trade is constrained by trade remedies, including dumping allegations and subsidies on coated paper in the United States, certain uncoated paper products in the United States, and A4 copy paper in Australia (FGD at the Ministry of Trade, September 25, 2018). This finding aligns with the previous research in the case of FuelIEU maritime regulation. According to the Advocacy Coalition Framework, the policy process leading to the political agreement on the FuelIEU Maritime regulation involves the core beliefs of two advocacy coalitions. These include the European Commission, the Council of Ministers, EU Member States, the European Parliament, and various interest groups, including Transport & Environment and the European Community Shipping Association. The framework also identifies the pathways to policy change (Malmberg, 2023).

The Ministry of Environment and Forestry is the main actor advocating the proposal of the log export policy opening. The Ministry of Environment and Forestry and the APhi present several arguments supporting the proposal to reopen log exports: a) to improve upstream investments by enhancing business investments and employment in HTI, using HTI log standing stock unabsorbed by the industry, and increasing the domestic log market price; and b) to increase the state's revenue through log export taxes. KPK, through its 2013 review on corruption risks in the natural resources licensing system under the National Movement for the Rescue of Natural Resources (GNP-SDA), recommended evaluating and allowing limited log exports. However, the Ministry of Trade rejected this recommendation, arguing that

the log export ban remains effective in maintaining the log raw material supply and giving an added value to the domestic industry. Perhutani supports optimizing utilization of premium-quality logs currently unabsorbable in the domestic market, suggesting that opening export opportunities for specific log types could increase revenues in accordance with the existing regulations. Creation of an added value typically begins with the selection and grading process of raw products (Nurrochmat, 2017).

The discourses, beliefs, and interests conveyed by the parties opposing the log export ban policy have not yet initiated a change in the policy. Considering the SVLK policy polemic experience developed at the Ministerial Limited Meeting with the President, it is suggested that this log export ban policy issue be discussed at the limited meeting.

Formation of advocacy coalitions Previous research also used network data to demonstrate that policy core beliefs form a coordinated network into at least two advocacy coalitions (Weible & Sabatier, 2005). A similar pattern is observed in the debate on the log export policy, in which two coalitions are formed: Coalition A, which supports the log export ban policy, and Coalition B, which opposes it, each with relatively strong backup, as presented in Table 4 and Table 5. Competing coalitions can stabilize policymaking and hinder policy changes required to address the mounting pressures on land-use systems globally. Thus, understanding the driving forces of coalition formation is important (Malkamaki et al., 2021). The controversy about the forestry criteria in the taxonomy highlights the polarization of forestry and environmental interests, which can be mapped as two opposing coalitions—a forestry and bioenergy coalition and an environmental coalition. The forestry and bioenergy coalition initially defended its stance against the taxonomy, fearing that it could provide environmental regulation for forestry and bioenergy through “the backdoor of a financial regulation” and restrict the possibilities of intense forest use (Begemann et al., 2025). The results of this study align with a previous study, indicating the formation of two coalitions: those supporting and those opposing the log export ban policy in Indonesia.

The Institute of Development Studies (2006) showed that the public policy development often influenced the network power; when the network of actors becomes overly strong and impenetrable, policy change becomes difficult, and any rational argument is unable to shift the dominant policy narratives. Advocacy coalitions may also rapidly form in response to government regulatory actions (Chen, 2003). The ACF is less useful in a policy subsystem without any clear coalitions (May, 1989) or those dominated by a single advocacy coalition (Stewart, 1991). Coalitions consist not only of associations but also of HPH and HTI entrepreneurs, some of whom hold different views with their preferred association coalition (based on interview data). This debate also gives rise to an actor with the role of “policy mediator” or, in ACF terms, “policy broker.” The role of policy mediator is generally performed by the Deputy Coordinator for Trade and Industry, Coordinating Ministry for Economic Affairs, whose main task and function is to coordinate businesses in the industry. Policy mediators are usually selected officials (Munro, 1993) or high-level civil servants (Doggan, 1975).

Coalitions trust these mediators and grant them the authority to make decisions. They are also capable of intervening in high-conflict situations to mediate solutions between opponents (Ingold & Varone, 2011). The role of a policy broker is considered vital in addressing these policy misconceptions. Emphasis is placed on policy brokering strategies, particularly venue creation, issue (re)framing, and knowledge co-production, which resulted in changing policy beliefs and policy learning (Chu et al., 2022).

Conclusion

The dynamics of the log export ban policy are divided into two periods, shaped by the underlying power politics and the discourses and interests of the various actors involved. The policy continues to be implemented by the government on the grounds that it is deemed appropriate for promoting downstream development and the supply of raw materials. Furthermore, external parameters occupy a vital position as they often divert public attention to or away from policy subsystems, such as socioeconomic condition parameters, public opinion parameters, and the policy decisions and impacts parameter. The ACF approach yields two coalitions with distinct belief systems: Advocacy Coalition A, which supports the ban on log exports, and Advocacy Coalition B, which opposes it. Advocacy Coalition A comprises the Ministry of Trade, the Ministry of Industry, downstream timber associations, business players, and environmental NGOs, which continuously deliver their interests and counter-discourses to maintain the implementation of the log export ban. At the same time, Advocacy Coalition B includes the Ministry of Environment and Forestry, Perhutani, and the APHI, who actively share their views to convince others to support the reopening of log exports. In addition, the Coordinating Ministry for Economic Affairs is identified as a policy mediator (policy broker). The problem described above should be discussed more intensively at the ministerial level or, if necessary, in limited meetings with the President of the Republic of Indonesia to find mutually beneficial solutions to challenges in forestry sectors. These include increasing domestic log price and profitability, attracting upstream investment, ensuring the supply of raw materials for domestic industries, and promoting downstream development with higher added value.

Recommendation

The dynamics of debates on the log export ban policy in Indonesia are likely to continue in the future, as long as the actors involved have different discourses and interests that require regulation by the government, particularly in the ministries or government institutions responsible for creating and implementing policies regarding forest ecosystem function and the sustainable economic value of log products in Indonesia. The Coordinating Ministry for Economic Affairs, acting as a policy mediator, can facilitate this process by establishing mutually agreed upon rules that all stakeholders can collectively implement. These rules should be binding and include clearly defined rights, obligations, and sanctions, with implementation monitored by all involved actors across the upstream to downstream value chain.

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