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Timber Committee

REPORT OF THE COMMITTEE ON ITS FORTY-EIGHTH SESSION
(8 to 12 October 1990)

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Introduction

1. The Timber Committee held its forty-eighth session at Geneva from 8 to 12 October 1990. The session was attended by representatives from the following countries : Austria, Belgium, Bulgaria, Byelorussian Soviet Socialist Republic, Canada, Czech and Slovak Federal Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, the Netherlands, Norway, Poland, Portugal, Romania, Spain, Sweden, Switzerland, Turkey, Ukrainian Soviet Socialist Republic, Union of Soviet Socialist Republics, United Kingdom of Great Britain and Northern Ireland, United States of America, Yugoslavia.

2. The following United Nations and specialized agencies were represented : United Nations Conference on Trade and Development (UNCTAD); International Labour Organisation (ILO); Food and Agriculture Organization of the United Nations (FAO), United Nations Environment Programme (UNEP).

3. The following intergovernmental organization participated: European Economic Community (EEC).

4. The following non-governmental organizations were represented: European Confederation of Agriculture (CEA); International Organization for Standardization (ISO); International Technical Association for Tropical Timber (ATIBT); Organization of European Sawmilling Industries (OES).

5. The Committee paid homage to the memory of Mr. L Sudjic, for many years a delegate of Yugoslavia to the Committee.

Adoption of the agenda (Item 1 of the agenda)

6. The provisional agenda (ECE/TIM/52) was adopted.

Election of officers (Item 2 of the agenda)

7. Mr. H van der Meiden (the Netherlands) and Mr. E Moskov (Bulgaria) were re-elected Chairman and Vice-Chairman respectively.

Matters arising from the forty-fifth session of the Economic Commission for Europe (Item 3 of the agenda) (TIM/R.177)

8. The Committee was informed of the Commission's discussion of its work and the resolution and decisions of the Commission. It agreed to take account of these discussions, the resolution and decisions, particularly with regard to its programme of work.

9. In accordance with paragraph 4 of decision A(45), the Committee agreed to co-operate fully with the Special Working Group set up by the Commission, and asked the secretariat to draw to the attention of the Special Working Group its opinion as set out below.

10. The Committee noted the great importance of the forestry and wood industry sector for the countries of the ECE region (forests cover 40% of the region's land area) and of the ECE region's forests and wood industries for the world as a whole (about 3/4 of world output of industrial wood). It also noted the growing political awareness of problems connected to forests and forest industries, including forest damage, forest fires, tropical deforestation and the role of forests in environmental conservation.

11. Delegations considered the Committee's programme was in accordance with their countries' needs and priorities, and that the Committee was an extremely effective instrument of international co-operation in this field. They noted that the Committee's work programme already took into account the priority areas identified by the Commission itself or the Special Working Group (with the exception of transport). For instance, sustainable development had long been a guiding principle of the forest sector, and many of the Committee's activities were concerned with this, notably the long-term outlook studies and activities concerned with the state of the forest, including forest health, energy conservation, and the use of wood as a renewable raw material and source of energy. A programme to assist economies in transition in eastern and central Europe was being drawn up at the present session. The Committee had many activities aiming at environmental protection, economic analysis and projections (short and long term) and collection, publication and improvement of statistics, and contributed to trade facilitation through its market reviews and other studies.

12. The Committee noted that it was the only pan-European body active in the forest industry and trade sector. Delegations welcomed the fact that the Committee considered together the problems of the forest and the forest industries, as well as the fact that its sessions and other activities attracted high level participation, also from business.

13. The Committee stressed that the questions it dealt with were quite specific and could not be merged with other fields of ECE activity, including agriculture. There existed very satisfactory links with FAO at the governmental and secretariat levels which had been held up as an example of good inter-agency co-operation and removed all danger of duplication between the two organizations. The Committee considers that merging with another ECE body or the transfer of its functions to another organization could lead to a reduction in the services provided to the forest and forest industry sector in the ECE region, without any significant saving of resources. Delegations are willing to continue to assist the Committee in redefining its priorities within the context of a changing environment.

Activities of other Principal Subsidiary Bodies of ECE of concern to the Timber Committee (Item 4 of the agenda) (TIM/R.178)

14. The Committee was informed of activities of other Principal Subsidiary Bodies of ECE dealing with matters of concern to it. It took note of this information and agreed to take it into account when discussing its own programme of work.

Activities of FAO and other international organizations of relevance to the Timber Committee (Item 5 of the agenda) (TIM/R.179)

15. The Committee was informed about the tenth session of the FAO Committee on Forestry in Rome in September 1990, at which major items of discussion were the progress of the Tropical Forestry Action Plan (TFAP) and the proposal for an international convention on the conservation and development of forests. The FAO Pulp and Paper Advisory Committee has met in May when the major topic was environmental aspects of the industry. The Advisory Committee established a working party on this subject. The Committee was also informed of the proceedings of the seventeenth FAO Regional Conference for Europe held in Venice in April 1990.

16. The Committee was informed that the FAO Committee on Wood-Based Panel Products is scheduled for December 1990 and that the twenty-fifth session of the European Forestry Commission will be held from 3 to 7 June 1991 in Oslo (Norway).

17. The French delegation informed the Committee about preparations being carried out, with the assistance of FAO, for the Tenth World Forestry Congress which will be held in Paris, 17 to 26 September 1991.

18. The representative of the International Labour Organization (ILO) informed the Committee of the preparations for the Second Session of the ILO Forestry and Wood Industries Committee which will take place in Geneva from 17 to 25 April 1991. He also drew special attention to the active participation of ILO in the work of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training. ILO will draw up an outline for a Joint Committee activity on certification of the levels of skill and training of forest workers in the ECE region. Delegations were invited to provide relevant information.

19. The Committee also took note of statements by the European Confederation of Agriculture (CEA), the International Organization for Standardization (ISO) and the International Technical Association for Tropical Timber (ATIBT).

Subsidiary bodies, special meetings and teams of specialists (Item 6 of the agenda)

(a) Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training
(TIM/EFC/WP.1/20)

20. The Timber Committee was informed of the results of the eighteenth session of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, which took place in Munich at the invitation of the Government of the Federal Republic of Germany from 2 to 4 July 1990. The session was organized on the occasion of the INTERFORST Forestry Fair and Congress and was preceded by a study tour and seminar on forest site conservation and improvement for sustained yield (26-30 June).

21. The Committee noted that, as agreed at the last session, a paper (TIM/EFC/WP.1/R.96) had been submitted to the eighteenth session, summarizing the conclusions and recommendations of Joint Committee seminars held since the seventeenth session which were deemed to be of particular relevance to its parent bodies and of importance from the forest policy point of view. It noted further that a version of that paper, revised in the light of the Joint Committee session, would be submitted to the twenty-fifth session of the European Forestry Commission in June 1991. The Timber Committee agreed to revert to the discussion of that paper at its next session in the light of the European Forestry Commission's findings.

22. The Timber Committee took note of the seminars to be held under the auspices of the Joint Committee in 1991 and 1992 (see annex III) and of the establishment of two new teams of specialists to deal with:

- afforestation techniques on agricultural land;
- site damage risks.

23. The delegate of Poland confirmed his country's willingness to lead the first of these activities; the second is under the leadership of Belgium.

24. The Timber Committee welcomed the fact that the Joint Committee had further strengthened its efforts to incorporate environmental concerns into all its activities, alongside technical, social and economic factors. It also stressed the relevance of forestry work, including the Joint Committee's activities, to the whole concept of sustainable development.

25. It also welcomed the decision to include a new activity, as proposed by the delegations of Byelorussian SSR and the USSR, dealing with the impact of nuclear accidents on forest ecosystems. In this connexion, the delegation of the Ukrainian SSR confirmed its willingness to co-operate with the experts of other two republics in the preparation of a report to the next session of the Joint Committee's Steering Committee. The Committee also noted with appreciation that the Joint Committee had set up a team of specialists to develop a programme of assistance to the countries of eastern and central Europe in transition.

26. The Timber Committee approved the report of the eighteenth session (TIM/EFC/WP.1/20) including its programme of work for 1991-1995. Appreciation was expressed of the Joint Committee's ability to adapt its programme to changing priorities.

27. It expressed warm thanks to the Governments of the countries where seminars had been organized in the past two years: Belgium; Finland; France; Germany; and Turkey. Finland and Germany had also been hosts to sessions of the Steering Committee and of the Joint Committee respectively.

(b) Joint ECE/FAO Working Party on Forest Economics and Statistics
(TIM/EFC/WP.2/19) (TIM/R.190 and Add.1)

28. The Chairman of the Working Party, Mr. N A Burdin (USSR) presented the report of the Working Party's seventeenth session. The Committee noted with pleasure the Working Party's nomination of Mr. E Clicheroux (Belgium) and Mr. K Janz (Sweden) as honorary chairmen in recognition of their valuable services over many years to the Working Party.

29. The Committee took note of the activities of the Working Party and endorsed its report. Among other activities it welcomed the offer of the CEA to collaborate with the Working Party through its next study on productivity and costs in forestry and to assist in the development of a common methodology to allow coverage to be extended to other ECE countries. The Committee was informed that the 1990 survey of the structure and capacity of wood-based panels industries had been completed on a world basis by FAO and data had been received from some 85 countries (including ECE member countries). The world survey is now published. Concerning transfer of economic and statistical methods the Committee noted that a seminar on forestry statistics had been held in Africa in 1989 for English speaking countries and that further seminars were scheduled for other regions. It was proposed that a seminar for European countries should be included in the Working Party's programme. The Committee supported the distribution of ECE forestry statistical documents to forestry statistics offices in other regions as a valuable contribution to information exchange.

30. The Committee repeated its firm conviction that it was necessary to retain in customs and statistical classifications the distinction between pulpwood, logs and other industrial wood in order to carry out any meaningful analysis of international trade in wood in the rough. It endorsed the draft

statement on this subject contained in TIM/R.190/Add.1 and requested the secretariat to transmit its opinion to the Customs Co-operation Council, which would be reconsidering section 4403 of the Harmonized System during 1991. It noted that the FAO Committee on Forestry had endorsed a similar statement and requested its secretariat to work closely with FAO staff in presenting the joint position of the two bodies. The Committee also urged delegations and other international organizations, including the European Communities, to make representations in the appropriate quarters to ensure that the pulpwood/logs/other industrial wood distinction was reinstated both in the Harmonized System and the Standard International Trade Classification (SITC Rev.3).

31. The Committee further requested that attention be drawn to the ambiguity arising from the terms "roughly squared" and "treated with paint, stains, creosotes and other preservatives". Attention was also drawn to the need to clarify the distinction between tropical and temperate non-coniferous sawnwood in group 4407.

32. The Committee was informed of progress on the Global Forest Resource Assessment being carried out by FAO. The Joint FAO/ECE Agriculture and Timber Division is responsible for the part covering the developed, temperate-zone countries. The Committee recalled that forest resource assessment, including forests' role in supplying environmental and other non-wood benefits, was among the Timber Committee priorities. The Committee strongly urged all countries which had not yet done so to transmit their replies to the enquiry on the Forest Resource Assessment to the secretariat as soon as possible.

(c) Study tour in Hungary (TIM/R.180)

33. The Chairman, Mr. H van der Meiden (Netherlands), informed the Committee of the results of the most successful and interesting study tour in Hungary on the theme of "silvicultural and manufacturing aspects of the utilization of fast-growing species in Hungary". The Committee warmly thanked the Government of Hungary for organizing the study tour and for the generous hospitality extended to participants.

34. The Committee noted that during the study tour participants had been consulted informally and made proposals about a seminar on exotic species, to be held under the auspices of the FAO European Forestry Commission. The Committee considered this was an interesting theme and also of interest to its own members. It agreed that the proposals should be examined first by the EFC and then at its own forty-ninth session.

(d) Team of specialists on implications of air pollution and other damage to forests for wood supply and markets (TIM/R.181)

35. The team leader, Mr. L Schotte (Sweden) informed the Committee that the team's meeting originally scheduled for September 1990 had had to be postponed. It would now take place on 21-22 February 1991, at Freiburg-im-Breisgau (Germany), in conjunction with the FAO ad hoc Working Group: Impact of Air Pollution on Forests. It would include a symposium on the impact of the new type of damage on the economic situation of forest enterprises. The Committee agreed that the team should reconsider its terms of reference, in particular with regard to possible new activities (e.g. relating to satellite sensing, as outlined in paras 37-42 below) and its co-operation with the FAO group. Mr. Schotte also informed the Committee of the results of the first meeting of the European Forum for Forest Protection, held in Sweden in July 1990, and of some of the main points of the report prepared by Mr. S Nilsson for review by the team at its next meeting.

36. The Committee was informed of activities under the Convention on Long-Range Transboundary Air Pollution, notably the International Co-operative Programme (ICP). It welcomed the close co-operation between the ICP and the team of specialists.

(e) Ad hoc meeting of experts on the practical application of satellite sensing for forest damage assessment(TIM/R.182 and Add.1)

37. The Committee was informed of the results of the third meeting on this subject, which had taken place in May 1990 at Sosnowka at the invitation of the Government of Poland. The meeting formulated the principal objectives of international activities in this field and established a technical group to look further into such aspects as development of test sites, data to be collected, scientific progress and national data bases. It came to the conclusion that the scientific work should go on at the national level, giving particular importance to the accuracy of methodological approaches.

38. In accordance with the ad hoc meeting's decision and at the invitation of the Government of the Czech and Slovak Federal Republic, the technical group met at the beginning of October 1990 in Prague to elaborate some further recommendations, taking into account recent advances in satellite technology and their applications for forest damage assessment.

39. The technical group, which had been chaired by Mr. S. Jaakkola (UNEP-GRID), proposed to initiate a large scale operational experiment to assess forest damage in three European countries, Czech and Slovak Federal Republic, Germany and Poland, to appoint a Scientific Advisory Board for the duration of the experiment and to develop a Coordinating Centre. Work should be linked where possible with existing activities such as the Convention on Long-Range Transboundary Air Pollution.

40. The technical group proposed that individual countries should support their respective activities (field work, data processing, personnel, etc.), while additional costs associated with these activities should be supported through outside sources.

41. The Committee agreed that satellite sensing could be an important additional tool for forest damage surveys in Europe. It requested Mr. Schotte and the secretariat to explore further the feasibility of the technical group's proposals, and in particular to ascertain whether UNEP, via UNEP-GRID, was in a position to undertake the role of Coordinating Centre. A first discussion on this topic should take place at the joint FAO/ECE meeting in Freiburg (see para 35). In particular it invited the team of specialists to consider expanding its terms of reference to include the oversight of the work on satellite sensing. The Committee approved the report of the third ad hoc meeting of experts and the recommendations by the technical group.

42. The Committee considered that with the preparation of these proposals, the ad hoc meeting had completed its task as initially formulated. It expressed its warm thanks to the members of the ad hoc meeting and its technical group for their excellent work and to the authorities of Poland and the Czech and Slovak Federal Republic for providing host facilities and organizing the work of the ad hoc meeting of experts and the meeting of the technical group respectively.

Market developments in 1990 and prospects for 1991 (Item 7 of the agenda)
(TIM/R.183)

43. The Committee's discussion on the forest products markets was based on national reports and statistics, countries' estimates for 1990 and 1991, and the secretariat's Annual Forest Products Market Review (Volume XLIII, issue no. 5 of the Timber Bulletin). The Committee approved a statement on the market for issue as a press release and for inclusion, together with estimates for 1990 and 1991 and other tabular material, in Forest Products Markets in 1990 and Prospects for 1991 (Volume XLIII, issue No.8 of the Timber Bulletin).

44. The Committee noted that the Annual Review this year was in a different format than usual. This was because the post of Forestry Officer (Markets) in the Joint FAO/ECF Agriculture and Timber Division had remained vacant since the retirement of the previous incumbent in September 1989. However, thanks to the major contribution of a consultant, it had been possible to issue the Annual Review with a different coverage. The Committee recalled that it had attributed high priority to sub-programme 14.2 of its programme of work - Current forest products market developments and short-term prospects, including international trade, with which this post is largely concerned, and strongly expressed the hope that the post would be filled as a matter of urgency, so that this important activity could be resumed in full as soon as possible.

45. The Committee considered the system set up to distribute information on sudden and severe damage to forests had functioned correctly in response to the storm-damage catastrophe in early 1990. It noted that a Model Forest Damage Manual was in preparation under the auspices of the Joint FAO/ECE/ILO Committee and a draft would be completed in 1991.

Special topic: Timber trends and prospects in North America (item 8 of the agenda) (ECE/TIM/53, TIM/R.185)

46. Mr. D. Boulter (Canada) and Mr. D. Darr (United States) presented this study, prepared by the Governments of the Canada and the United States of America in the context of the Committee's programme of outlook studies. The excellent presentation was followed by a discussion. The Committee expressed its warm appreciation of a most interesting study and thanked the Governments of Canada and the USA for an important contribution to its programme.

47. The Committee noted with satisfaction that with this study the Committee had now issued studies of the outlook for the forest sector in Europe (ETTS IV, ECE/TIM/30, 1986), the USSR (ECE/TIM/48, 1989) and North America (ECE/TIM/53, 1990), thus covering all parts of the ECE region.

European timber trends and prospects study (ETTS V): progress report (item 9 of the agenda) (TIM/R.186)

48. The Committee was informed of activities carried out since its last session, notably the workshop on roundwood supply forecasting, held in Jönköping (Sweden) in March 1990 and the exploratory work on modelling supply of forest products.

49. It urged all countries which had not yet done so to nominate correspondents for ETTS V as soon as possible, as these correspondents would make an extremely valuable contribution to the study.

50. It also urged all countries that intended to undertake studies of end-uses of sawnwood and panels, as recommended by the Committee, to make the methodology and concepts as internationally comparable as possible, in particular by following the guidelines in TIM/EFC/WP.2/19, annex III.

51. The Committee agreed that an informal meeting should be convened in 1991 to lay the foundations of work on the study of the outlook for supply and demand of non-wood benefits of forests in their own right.

52. It agreed that ETTS V should take full account of the policy environment and attempt to identify emerging policy issues.

53. The Committee again urged countries to consider what contributions they could make to the core team for ETTS V, notably by making available the services of experts or by contributing to the ETTS trust fund. It expressed its gratitude to those countries that had already committed resources or offered assistance; also to Sweden for hosting the workshop on roundwood supply forecasting.

Programme of work (Item 10 of the agenda)

(a) Study tour in Portugal, 1991 (TIM/R.187 and TIM/EFC/AC.6/1)

54. The study tour in Portugal will be held under the joint auspices of the Timber Committee and of the European Forestry Commission from 5 to 11 May 1991. The theme of the tour will be: "The forest resource and the wood-working industries in Portugal". An information note has been issued, containing the study tour's programme and a registration form.

55. The Committee reiterated its invitation to governments to ensure that the deadline for registration was respected by participants, so as to help the host country organizers in their preparation.

56. The Committee accepted with gratitude the offer of the Czech and Slovak Federal Republic to act as host to a study tour in 1992. The proposed theme of the tour is : "Forest regeneration in areas exposed to air pollution". In view of this theme, it was suggested that the tour be held jointly with the European Forestry Commission.

(b) Seminar on new technologies and applications of wood-based panels
(TIM/R.188 and ECE/TIM/SEM.14/1)

57. The Committee was informed by Mr. Z Przyborski (Poland) of the preparations for the Seminar on new technologies and applications in the wood-based panels sector (Gdansk, Poland, 20-24 May 1991). The Committee approved the provisional agenda, scope and objectives of the seminar drawn up by the preparatory meeting. The Committee invited the countries concerned to ensure that basic papers were prepared and submitted by the deadline.

58. The Committee supported the suggestion that the opportunity be taken during the seminar to bring together wood-based panels industry and market specialists from different countries to hold informal discussions on possible activities in support of economies in transition (see paras. 65-68) and invited the Polish authorities and the secretariat to consider whether this could be arranged.

(c) Review and revision of the draft programme of work for 1991 to 1995
(TIM/R.189 and Add.1)

59. The Committee began its consideration of this item by reaffirming its views expressed under item 3 of the agenda in response to the request of the Commission in decision A(45) to cooperate fully with the Special Working Group set up to review ECE priorities, activities and structures (see paras. 9-13). It reiterated the importance it attached to the role of the Timber Committee for the forest and forest industry sector in the pan-European context, especially as a means for strengthening the links between the forest resource and the wood industries and for its value as a source of information to industry. For these and other reasons stated earlier, the Committee felt that it would not be in the interests of the forestry and wood industry sector to merge the Committee with another Principal Subsidiary Body of ECE.

60. In response to the instructions that ECE Principal Subsidiary Bodies should establish priorities among their programme elements every three years (E/ECE/1150/Rev.1, para. 134), the Committee reviewed the priorities it had drawn up in 1987. It confirmed that those priorities were still applicable under 1990 conditions and noted also that all of them, as listed in TIM/R.189, para. 26, fell within the priority areas identified in the course of the work of the Special Working Group.

61. The representative of the Commission of the European Communities (EC) asked the Committee to transmit to the Special Working Group the following statement on the Timber Committee's activities which had been approved by the EC member states.

62. "The European Community calls upon the Special Working Group, set up by the ECE to review ECE priorities, activities and structures, to take into account the great and increasing importance of forest resources, products and services, not only in the ECE region but also the world as a whole. In this context, the ECE Timber Committee has continued to be a unique forum for the exchange of both quantitative information and views for the forestry sector. Its analyses, reports and projections are fundamental to the up-dating of policies relating to forest products at national level, to the management of programmes and, moreover, provide much of the informed basis for the consideration of global forestry and connected issues.

63. The proliferation of threats to the world's natural resources and our environment, coupled with increasing public awareness of environmental issues, requires that accurate quantitative information and scenarios be available to policy-makers and others if the sector is to be able to respond to the challenges it faces. Thus, whilst totally respecting the integrity of the ECE and its need to review its priorities, particularly within the context of the economic transition in progress or envisaged in many of its Member States, the European Community requests the Special Working Group to bear the sector's increasing needs in mind when reviewing the Timber Committee. For its part, the Community will make every effort to help the Timber Committee to re-define its own priorities in response to the new and changing economic and environmental climates within which it functions. In this respect, the complementarity of effort between the Timber Committee and, in particular, the European Forestry Commission and the International Labour Organisation should be reinforced".

64. The Committee considered its programme of work on the basis of the draft prepared by the secretariat, which took into account the programme adopted by the Committee's forty-seventh session, the resolution and decisions of the Commission at its forty-fifth session and the proposals for their respective programmes of work drawn up by the seventeenth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics and the eighteenth session of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training. It also took into account the results of other activities since its previous session, as well as its own discussions under other items of the agenda. The Committee approved its programme of work as set out in annexes I and II.

65. In accordance with Commission decision D(45) the Committee prepared a programme of assistance to the economies in transition in eastern and central Europe. After consultation with representatives of other economies in transition, Mr. E Moskov (Bulgaria), Vice-Chairman of the Committee, proposed a list of topics which were relevant to the special needs of the countries in transition and on which effective action could be undertaken under the Committee's auspices. He stressed the need for flexibility. The main methods of work would be missions of experts, informal workshops, study visits and training courses, with some exchange of written information. Each activity would be organised by the participating countries and financed on a case by case basis. The role of the Timber Committee and its secretariat would be to encourage the necessary contacts, initiate activities, participate when possible, distribute results and oversee the programme as a whole. (The proposals are reproduced in full in annex IV).

66. Mr. Moskov proposed the following list of topics:

A. Administrative aspects

- A.1 Institution building in the forest and forest products sector
- A.2 The role of government agencies vis-à-vis the forest and forest products sector in the market economy system

B. Concrete problems affecting the forest and forest industries sector

- B.1 Privatisation in the forest and forest industry sector
- B.2 Costing and pricing of forest products
- B.3 Assessment of investment needs for the forest and forest industry sector
- B.4 Market research, market development, marketing and distribution of forest products
- B.5 Rational utilization of forest products in a free market economy
- B.6 Joint ventures in the forest industry sector

C. Training

- C.1 Management training for the forest industries
- C.2 Development of effective systems for training in technical skills in the forest industry and trade sector

D. Environmental protection

D.1 The forest and forest industry sector in areas contaminated by radiation

D.2 Forest damage attributed to airborne pollution

E. Standards, certification, grading and quality control of forest products

67. The Committee welcomed and endorsed these proposals, considering they provided an excellent starting point for co-operation and assistance in a flexible international framework. It requested the secretariat to ascertain which of the topics were of interest to each country in transition, and then to contact the market economies to initiate work. It recommended that work should be started as soon as possible.

68. It was suggested that it might also be useful to support the participation of experts from countries in transition in the preparation of ETTS V, thereby furthering the outlook work and providing useful experience. The secretariat was asked to explore this idea further.

69. The delegation of the Ukrainian SSR, speaking also on behalf of the Byelorussian SSR and the USSR, invited the Committee to consider undertaking activities to find practical solutions to forestry and forest industry problems arising in areas contaminated by radiation. It also asked ECE member countries to provide, through the secretariat, all possible information on national experiences related to these problems and their solutions. The Committee noted that the Joint FAO/ECE/ILO Committee on Forest Technology Management and Training had already initiated work on the forestry aspects of the problem, while the topic was also included in the list of proposed activities in support of economies in transition (see para. 66, item D.1). The Committee nevertheless considered that the matter was of such urgency that a team of specialists should be established as soon as possible, charged with the task of examining the forestry and forest industry problems created by the Chernobyl disaster and making proposals for their solution, including international co-operative activities.

70. The Committee reviewed its programme in the light of ETTS IV, on the basis of proposals by the secretariat and discussed by the office-holders (TIM/R.189/Add.1). It considered that no major changes in emphasis were necessary. However, a few additions appeared desirable:

- (a) a seminar should be held on the competitiveness of sawnwood (programme element 14.4.5);
- (b) a team of specialists should examine the subject of productivity and profitability in forestry and the forest industries and prepare recommendations for the next session of the FAO/ECE Working Party in August 1991;
- (c) the Timber Committee should co-operate if the co-sponsor of ETTS IV, the European Forestry Commission, decided to hold a symposium on forest policy in the context of integrated land-use policies. The representative of the Commission of the European Communities made some proposals about the scope of such a seminar which the secretariat was requested to transmit to the EFC.

71. With regard to the study of productivity and profitability, Mr. N E Nilsson (Sweden), pointed out that profitability was a difficult concept for forestry. He considered it might be useful to examine the current flows of costs and benefits, possibly including non-wood benefits, in the forest sector. The Committee requested Mr. Nilsson to prepare more detailed proposals on this, which could then be discussed by the Joint FAO/ECE Working Party and/or the team of specialists on productivity and profitability.

72. The Committee was informed that it had not been possible to make permanent arrangements for the IIASA data base on the European forest resource, essentially for lack of resources. The Committee therefore regretfully agreed that it should not take further steps in this matter.

73. The Committee endorsed the proposal that its session in 1993 should be held jointly with the EFC. It agreed that the joint session should be organised round a major topical theme or themes. It asked the secretariat to make proposals for suitable themes to the sessions of the two bodies in 1991.

74. The Committee invited countries to consider acting as host to one (or more) of the seminars and workshops included under programme elements 14.4.2., 14.4.3., and 14.4.5. of its programme of work (see list in document TIM/R.189, para. 33).

75. With regard to 14.1.2 - Medium-term trends in industry structure and markets in specific forest products sectors, the Committee accepted, but with regret, the need to reduce activities until the secretariat was fully staffed again. Provided this was achieved in time, it agreed that the next medium-survey, for publication in 1992, should deal with trends in the sawnwood and sawlog sector, followed by one on the wood-based panels sector in 1993 combined with the next survey of structure and capacity of those industries. It postponed a decision on the periodicity of the medium-term surveys (a 3- or 4-year cycle) to its forty-ninth session.

76. With regard to programme elements 14.1.3. Trends, prospects and policies in forestry and forest products in southern Europe, the Committee regretted that new proposals had not been submitted by the countries concerned. It decided to maintain this programme element in the work programme, as concrete proposals might be generated by the Conference on Security and Co-operation in the Mediterranean being held at Palma de Mallorca (Spain). The Committee urged the countries of southern Europe to consider which activities could be undertaken by the Committee under this programme element.

77. The Committee was informed that the Council of the International Tropical Timber Organization (ITTO) had approved in November 1989 the carrying out of a study on North American markets for tropical timber, with the Committee's secretariat as executing agency, as it had been for the study on European trade and markets for tropical hardwoods undertaken in 1988. The North American study would take the Committee's newly published study Timber Trends and Prospects for North America as a basis. The Committee agreed that work on the study could only begin after ITTO had allocated the necessary funds and the secretariat's present staff shortages had been overcome.

78. The Committee also asked the secretariat to explore with Mr. A Frühwald (Germany), leader of the team of specialists on wood and energy, (programme element 14.4.3), the possibility of convening a meeting of the team in 1991, to review the changed energy situation and to prepare the proposed seminar, including the question of a host country.

79. The Committee noted that the work of the team of specialists under programme element 14.5.2 Economic silvicultural, ecological and technical problems of the rational use of the forest biomass, had been completed with the holding of an international symposium in Moscow in 1989 and the distribution of the proceedings. It decided not to remove the subject from the programme of work, however, as the recent steep rise in oil prices made it likely there would be a renewal of interest in wood energy, and thereby in the fuller use of forest biomass. It agreed to reconsider activities under this programme element at its forty-ninth session.

80. The representative of the Commission of the European Communities informed the Committee that his organization will submit to the Joint FAO/ECE Working Party on Forest Economics and Statistics proposals for changes to the definitions used by ECE/FAO in the collection of forest fire statistics (programme element 14.6.2.4) which were also used by his organization.

Other business (Item 11 of the agenda)

81. The Committee was informed that although the documents for its session had been submitted for processing in time, the French and Russian translations had not been distributed before the meeting and were only available at the opening session. One major study (Timber Trends and Prospects for North America, ECE/TIM/53), also submitted in time, had not even been reproduced in the original language. It expressed its extreme concern at this intolerable situation and underlined the necessity of receiving documents, in all three official languages, well before meetings, as the quality of participation was significantly reduced if preparation before sessions was impossible due to lack of documentation. It requested the secretariat to transmit the Committee's concern to the appropriate services and to ensure that the situation did not occur again. It also noted that "publications" (e.g. issues of the Timber Bulletin) as well as studies to be reviewed at its meetings, were just as necessary to its work as other documents and should also be processed in time.

82. The Committee received a statement from the International Forestry Students Association (IFSA), in which it repeated its interest in strengthening contacts and co-operation with the Timber Committee. It requested the secretariat to invite the IFSA to suggest possible ways of doing so, including activities in connection with the joint session with the European Forestry Commission in 1993.

Adoption of the report of the Committee's session (Item 12 of the agenda)

83. The Committee adopted the present report of its forty-eight session.

Date of next session

84. The Committee agreed that its next session should be held from 7-11 October 1991, subject to the availability of conference services for that year.

ANNEX I

TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995

PROGRAMME 14 - TIMBER

This programme is carried out by the Timber Committee and its subsidiary bodies. The Committee meets annually, usually in October. In 1993, it will hold a joint session with the FAO European Forestry Commission. In addition to the activities specified under the individual programme elements or sub-elements, the Committee furthers the dissemination and exchange of information and experience by organizing study tours at the invitation of the Governments concerned: in Portugal in 1991 (jointly with the FAO European Forestry Commission) and in the Czech and Slovak Federal Republic in 1992.

SUB-PROGRAMME 14.1: MEDIUM- AND LONG-TERM TRENDS, PROSPECTS AND POLICIES FOR FORESTRY AND FOREST PRODUCTS

14.1.1. Appraisal of long-term timber trends and prospects

Description: The Committee keeps under review and up-dates projections and forecasts of long-term trends in production, trade, consumption and prices of forest products, comparing them with projections made in previous long-term studies. The studies provide Governments with the latest projections and forecasts of long-term prospects at the regional and sub-regional level as a framework for national studies and as a basis for drawing up national policies for the forest and forest products sector. Amongst other factors, the Committee's analyses take into account the impact of air pollution on the forestry and forest products sector, including the prospects for future wood supply.

Work accomplished and to be undertaken: The study on the trends and outlook for the forestry and forest products sector in the USSR was published in 1990, as was the study on timber trends and prospects in North America. The next major study of long-term trends and prospects in Europe will be prepared in the early 1990s. The methodology and data base for this study are being prepared by a team of specialists (see programme element 14.6.2.5)

Duration: Continuing.

14.1.2. Medium-term trends in industry structure and markets in specific forest products sectors

Description: The Committee reviews medium-term (3-5 years) trends in the production, consumption, trade and prices of major forest products and the structure and capacity of the sawmilling and wood-based panels industries so that governments may be continuously informed of structural trends in the forest products sectors of the ECE region. The medium-term surveys allow recent trends to be compared with the projections made in the long-term studies (project 14.1.1) and provide early warning to Governments of deviations from expected developments.

Work accomplished and to be undertaken: Medium-term surveys are carried out on a 3-year rotation of the following sectors: wood-based panels; sawnwood and sawlogs; wood raw material, notably pulpwood, and wood for energy. These surveys incorporate the results of surveys of the structure and capacity of major sectors. The surveys of the structure and capacity of the wood-based panels industries are carried out on a 3-year cycle (1993, 1996, etc.) and of the structure of the sawmilling industry on a 6-year cycle (1991, 1997, etc.). The next survey of trends in sawnwood and sawlogs will be published in 1992 and that on wood-based panels in 1993.

Duration: Continuing.

14.1.3. Trends, prospects and policies in forestry and forest products in southern Europe

Description: The forest and forest industry policy and environmental problems facing countries in the Mediterranean area are reviewed in the light of the long-term outlook for their forest economies (see 14.1.1.)

Work accomplished and to be undertaken: Further activities to be considered by the Committee at its forty-ninth session.

Duration: To be determined.

SUB-PROGRAMME 14.2: CURRENT FOREST PRODUCTS MARKET DEVELOPMENTS AND SHORT-TERM PROSPECTS, INCLUDING INTERNATIONAL TRADE

14.2.1. Review of production, trade, consumption and prices of forest products

Description: The Committee analyses, on a continuous basis, short-term trends in the production, trade, consumption and prices of forest products and forecast short-term prospects, with a view to providing Governments and the forest products sector with accurate and up-to-date information and assessments, necessary for an orderly development of the supply/demand mechanism.

Work accomplished and to be undertaken: The annual session of the Timber Committee reviews short-term trends and prospects in the production, trade and consumption of coniferous and non-coniferous (including tropical) logs and sawnwood, wood-based panels and pulpwood, on the basis of estimates and other market information prepared by delegations for the year in progress and the forthcoming year. An analysis of market trends, based on the Committee's discussions, is published after the session, as well as an Annual Forest Products Market Review based on data supplied by Governments in connection with project 14.6.1. The study on the European trade and utilization of tropical hardwoods, undertaken in cooperation with the International Tropical Timber Organization (ITTO) was published by ITTO in 1989. A study, in co-operation with ITTO, on North American tropical timber markets will be undertaken when the necessary funds are allocated by ITTO and the Committee secretariat is fully staffed.

Duration: Continuing.

SUB-PROGRAMME 14.3: FOREST TECHNOLOGY, MANAGEMENT AND TRAINING

This sub-programme covers the activities of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, which normally meets biennially (1992, 1994, etc.), with meetings of its Steering Committee in the intervening years. Its task is to foster international collaboration on technical, economic and organizational aspects of forest working techniques and training of forest workers in logging and forest operations. Special attention is given to the development and implementation of forest use planning and general management aspects; increasing the efficiency of labour, the reduction of the physical efforts of the worker and prevention of accidents; the reduction of waste; and the establishment of an adequate balance between technical, social and economic requirements and protection of the environment.

The eighteenth session of the Joint Committee agreed to establish a team of specialists with the mandate to draw up plans for a workshop which should establish guidelines to assist eastern and central European countries in transition to adapt to changing economic, social and institutional conditions. The workshop will be held, if possible, in the second quarter of 1991, and the Steering Committee should consider how to incorporate the team's proposals in the Joint Committee's programme of work.

14.3.1. Silvicultural operations and general management aspects**14.3.1.1. Development and use of methods and equipment for silvicultural operations, including stand establishment and multiple use forestry**

Description: The Joint Committee promotes the exchange of information and furthers silvicultural methods and techniques which do not damage the forest ecosystem and which take account of the multiple use of forests by regularly reviewing machines and techniques applied in silviculture, including afforestation and reforestation, with a view to assisting Governments in these fields.

Work accomplished:

(a) The proceedings of the Seminar on the impact of the mechanization of forest operations on the soil, held in Belgium in 1989, were published.

(b) A seminar on forest site conservation and improvement for sustained yield was held in the Federal Republic of Germany in 1990.

(c) The study on afforestation techniques in Spain, supplemented by material from other Mediterranean countries, was published.

(d) A team of specialists on a Model Forest Damage Manual held its second meeting in June 1990 and prepared a first draft of its report.

(e) Environmental aspects in forestry were treated as a special topic at the eighteenth session.

Work to be undertaken:

(a) Seminars will be held at intervals on selected items: in 1993 in France on forest seed collection, treatment and storage; in 1994 on afforestation techniques on abandoned agricultural land; in 1995 on techniques for safeguarding the survival and recovery of forests threatened by air pollution.

(b) The team of specialists on a Model Forest Damage Manual will complete the preparation of the Manual, for submission to the nineteenth session of the Joint Committee for approval and subsequent publication. In addition, the team will prepare a framework for national reporting on experience in dealing with catastrophes for submission to the nineteenth session for approval.

(c) A team of specialists on afforestation techniques on agricultural land will be established to draw up a proposal for a seminar in 1994 for submission to the nineteenth session.

(d) A team of specialists on site damage risks will be established to draw up proposals on activities to implement the recommendations of the seminars held in Belgium in 1989 and in the Federal Republic of Germany in 1990 for submission to the tenth session of the Steering Committee.

(e) The Steering Committee's tenth session will draw up proposals on possible activities concerning the mechanization of silvicultural operations.

Duration: (a) Continuing; (b) three years 1990-1992; (c) four years 1991-1994; (d) and (e) to be decided by the nineteenth session of the Joint Committee.

14.3.1.2. Forest fire prevention and control

Description: The Joint Committee examines techniques and equipment used in forest fire control, as well as prevention measures and detection, with a view to assisting Governments in these fields.

Work accomplished: Two issues of the International Forest Fire News were published in 1990.

Work to be undertaken:

(a) The enlarged team of specialists will hold an ad hoc meeting on forest fire detection equipment in Italy or Poland (subject to confirmation).

(b) A seminar on forest fire prevention: land use and people will be held in Greece in co-operation with the FAO Silva Mediterranea in 1991.

(c) International Forest Fire News will continue to be issued on a regular basis (twice yearly).

Duration: (a): to be decided by the nineteenth session of the Joint Committee; (b): 2 years 1990-1991; (c) continuing.

14.3.1.3. Methods and procedures for the preparation and implementation of forest management plans

Description: The Joint Committee surveys practical methods and procedures for the preparation and implementation of forest management plans, with special emphasis on the determination, collection and processing of relevant data with a view to assisting forest managers in the execution of their tasks.

Work to be undertaken: A seminar on forest management and data processing (title to be determined) will be held in Sweden in 1992.

Duration: Two years 1991-1992.

14.3.2. Wood harvesting and transport

14.3.2.1. Development and use of harvesting machinery and systems

Description: The Joint Committee keeps under review trends and prospects in the development and use of harvesting machinery and systems, taking into account specific conditions and cost/price relationships so as to encourage rational harvesting methods in flat, hilly and mountainous regions from the economic, ergonomic and environmental points of view.

Work accomplished: The proceedings of the Seminar on the mechanization of harvesting operations in mountainous terrain, held in Turkey in 1989, were prepared for publication.

Work to be undertaken: Seminars on selected items will be held at intervals: in 1991 in Denmark on thinning operations; in 1992 in the USSR on the use of multifunctional machinery and equipment in logging operations; in 1993 on forest operations necessary and admissible in protected areas; in 1994 on a topic related to wood harvesting and transport.

Duration: Continuing.

14.3.2.2. Forest roads and transport of wood raw material

Description: The Joint Committee promotes the exchange of information on methods of construction of forest roads and on the transport of wood raw material from the forest by road or other means, with a view to assisting countries to rationalize their transport systems and reduce costs.

Work to be undertaken: To be drawn up by the tenth session of the Steering Committee on the basis of proposals prepared by the subject area co-ordinators and taking into account related matters arising from the nineteenth IUFRO World Congress.

Duration: To be decided by the nineteenth session of the Joint Committee.

14.3.3. Vocational training, applied ergonomics, occupational safety and health

14.3.3.1. Vocational training in forestry

Description: By keeping under review developments and trends in vocational training in forestry, the Joint Committee assists Governments in planning their national vocational training policies, in raising the efficiency of forest operations and in improving working practices with regard to safety and health.

Work accomplished: The proceedings of the Seminar on the training of professional forest workers, held in Finland in 1989, were published.

Work to be undertaken:

(a) Seminars will be organized at intervals: in 1991 in Spain on vocational training in the Mediterranean countries; in 1992 in the USA (subject to confirmation) on the future of the forestry workforce in the ECE region; in 1994 or 1995 in Switzerland (subject to confirmation) on a topic related to vocational training in forestry.

(b) The representative of ILO will prepare a proposal for the tenth session of the Steering Committee for a possible activity concerned with the comparability of forest worker certificates and diplomas for acceptance as a basis for employment in different countries.

Duration: (a) Continuing; (b) to be decided by the nineteenth session of the Joint Committee.

14.3.3.2. Applied ergonomics, safety and health in forest operations

Description: The Joint Committee helps Governments in their national health and employment planning by keeping under review developments and trends in ergonomics applied to forestry, occupational safety and health, with a view to improving working methods and recommending safety standards in various operations, preventing occupational injuries and diseases, increasing work performance and forest workers' satisfaction with their job.

Work accomplished: The proceedings of the Seminar on the employment of contractors in forest work, held in France in 1988, were published. A seminar was held in 1990 in the United Kingdom on the use of pesticides in forestry.

Work to be undertaken: Seminars will be organized at intervals on selected problems: in 1993 and 1994 on topics related to ergonomics, safety and health.

Duration: Continuing.

14.3.3.3. Transfer of technical information and experience

Description: The Joint Committee promotes the transfer of technical information and experience by the countries of the ECE region to those in other regions, with a view to assisting the latter to develop their forestry capabilities.

Work accomplished: The Joint Committee's role in the transfer of forest technology in the ECE region was a special topic at the eighteenth session of the Joint Committee.

Work to be undertaken:

(a) Wherever possible, the proceedings of Joint Committee seminars will be published by the host country or by other means.

(b) Wherever possible, host countries of Joint Committee seminars and other countries will offer fellowships to assist participants from developing countries to attend the seminars of special interest for them.

(c) A task force will be established to assist developing countries in the event of forest catastrophes (linked with 14.3.1.1.).

Duration: Continuing.

SUB-PROGRAMME 14.4: ECONOMIC, TECHNOLOGICAL AND MANAGERIAL ISSUES FOR THE WOOD-WORKING INDUSTRIES

14.4.1. Development and introduction of new technologies and management methods in the wood-working industries, including furniture

Description: The Committee furthers the exchange of information and experience on technological developments in the wood-working industries including the use of process- and quality-control equipment (electronics, robotics, lasers, etc.), and on management techniques, particularly at the senior and middle-management levels with a view to helping countries to improve efficiency in the production of forest products, including furniture, to the benefit of the national economy and of the users of those products.

Work to be undertaken: A seminar will be held on new technologies and applications in the wood-based panels sector in Poland in 1991.

Duration: Three years 1989-1991.

14.4.2. Development of new products, markets and applications for forest products

Description: The Committee furthers the exchange of information and experience on new products, markets and applications for forest products, with a view to helping countries to improve efficiency in the use of raw materials and products, and provide technologically and economically better products to the consumer.

Work accomplished and to be undertaken: The secretariat will explore with the United States' authorities the possibility of holding a seminar related to the markets and utilization of hardwoods.

Duration: To be determined.

14.4.3. Energy conservation and self-sufficiency in the mechanical wood-processing industries

Description: The Committee encourages the exchange of information in this field, with a view to furthering the conservation of energy and, where appropriate, the increase of energy self-sufficiency in the mechanical wood-processing industries.

Work accomplished and to be undertaken: The team of specialists on wood energy meets every 1-2 years, most recently in September 1989. The team will work both on the exchange of technical information and on statistics and analysis of trends. The results of an enquiry on the trends in the use of wood for energy were included in the medium-term survey of trends for wood raw material, notably pulpwood and wood for energy, published in 1990. A seminar on choice of technologies for combustion of wood and bark in the forest industries will be held, probably in 1992 (host country to be decided). At its next meeting in spring 1991 the team will prepare the seminar.

Duration: Continuing.

14.4.4 Programme of assistance to the economies in transition in eastern and central Europe

Description: The Committee will provide assistance to the economies in transition with respect to their forest and forest industries sector, notably by facilitating their access to the relevant experience of the market economies, and by help in training.

Work to be undertaken: Work will be undertaken according to the proposals listed in annex IV. The secretariat will first ascertain which of the topics listed are of interest to each of the economies in transition, and then contact market economies to initiate the necessary activity. The main methods of work will be missions of experts, informal workshops, study visits, training courses and exchange of written information.

Duration: To be decided at the Committee's forty-ninth session.

14.4.5 Competitiveness of sawnwood

Description: A seminar will be held on competitiveness of sawnwood: it will identify the main factors affecting the competitiveness of sawnwood compared to other materials (e.g. cost factors, marketing, industry structure, innovation, promotion) and, if possible, examine past trends and the outlook for the future. This exchange of information and experience will be useful to industries wishing to make sawnwood more competitive, to Governments intending to develop policies for their sawmill sector and as input to ETTS V (programme element 14.1.1).

Work to be undertaken: A preparatory meeting will be held, probably in 1991. The seminar would take place in 1992 or 1993, depending on offers to act as host.

Duration: Three years to 1993.

SUB-PROGRAMME 14.5: ENVIRONMENTAL AND RESOURCE CONSERVATION ISSUES

(All the Committee's activities in this work area will be carried out in cooperation with the Senior Advisers to ECE Governments on Environmental and Water Problems).

14.5.1. Quantification and evaluation of the environmental benefits of forests

Description: The Joint FAO/ECE Working Party on Forest Economics and Statistics examines methods of quantifying and evaluating the environmental benefits of forests with a view to assessing forests' contribution to society, to calculating compensation for the environmental services of forests and to facilitating comparisons between countries.

Work accomplished and to be undertaken: The enquiry and definitions for the 1990 forest resource assessment, contain a section covering the environmental and other non-wood benefits of forests. The draft enquiry with definitions and guidelines was approved by the seventeenth session of the Joint Working Party and circulated in spring 1990. The preliminary results will be reviewed by an ad hoc meeting in 1991, revised and published with the other part of the forest resource assessment (14.6.3).

Duration: Three years 1989-1991.

14.5.2. Economic, silvicultural, ecological and technical problems of the rational use of forest biomass

Description: The Committee collects information on woody biomass on the basis of existing data in the ECE member countries and analyses the current situation and trends in the rational use of woody biomass. Special attention is given to economic, silvicultural, ecological and technical aspects. The main objective of the work is to help Governments and other institutions to choose the most suitable ways of using forest resources in order to meet the requirements of the country for all assortments of forests products, also taking into account environmental considerations and the sustainability of production.

Work accomplished and to be undertaken: The work has been carried out by a team of specialists led by the USSR, which made a progress report to the seventeenth session of the Working Party. The report was finalised in 1990. The Timber Committee will decide on further work at its forty-ninth session.

Duration: To be determined.

14.5.3. Implications of air pollution and other damage to forests for wood supply and markets

Description: The Committee examines the implications of air pollution and other damage to forests for wood supply and markets, taking into account the work being carried out by other competent bodies, notably the Executive Body for the Convention on Long-range Transboundary Air Pollution, the FAO European Forestry Commission, the European Economic Community, IIASA and IUFRO.

Work accomplished and to be undertaken: The team of specialists monitors and analyses developments in forest damage, notably that attributed to air pollution, and its consequences, notably economic, and policy options. It normally holds an informal meeting once a year, prepares an annual review of developments for the Committee, and works to improve the flow of information.

The team will hold a meeting in Germany in conjunction with the ad hoc Working Group: Impact of Air Pollution on Forests of the FAO European Forestry Commission. The team and the ad hoc Working Group both contribute to the ad hoc meeting of experts on the practical application of satellite sensing for forest damage assessment, which held its third meeting in 1990.

Duration: Continuing.

14.5.4. Information exchange on occurrences of sudden and severe damage to forests

Description: The Committee promotes the rapid international dissemination of reliable information on sudden and severe damage to forests in ECE countries, notably that caused by fire, windblow, snow and insect infestation, in order to reduce disruption of wood markets.

Work accomplished and to be undertaken: The mechanism set up by the Committee to disseminate information in this field is put into operation as and when necessary. Information on storm damage in twelve countries in early 1990 was collected and disseminated.

Duration: Continuing.

14.5.5. Problems in the forestry and forest industry sector arising from radiation contamination

Description: The Timber Committee will provide assistance to the Governments of the most seriously affected countries to find solutions to the problems caused to the forestry and forest industry sector in areas contaminated by radiation from the Chernobyl disaster.

Work to be undertaken: A team of specialists will be established with the task of examining the forestry and forest industry problems created by the Chernobyl disaster and of making proposals for their solution, including international co-operative activities. A progress report will be submitted to the forty-ninth session.

Duration: Two years 1991-1992.

SUB-PROGRAMME 14.6: FOREST AND FOREST PRODUCTS ECONOMICS AND STATISTICS

14.6.1. Publication of the Timber Bulletin

Description: The Committee collects statistics on production, trade and prices of forest products, with a view to providing Governments and the forest products sector with data on the basis of which to formulate policies and make decisions.

Work accomplished and to be undertaken: The secretariat publishes 9 issues a year of the Timber Bulletin. Of these, two contain annual and quarterly statistics on production and trade of forest products, collected from Governments by means of half-yearly questionnaires, and other relevant information, one contains annual data on trade flows collected from the same sources, and two contain monthly and annual prices and price indices of forest products and related data extracted from official national publications. Country forest and forest products profiles are prepared by the secretariat, in collaboration with the Governments of the countries concerned, and published.

Duration: Continuing.

14.6.2. Selected problems of economics and statistics of forestry and forest products

This programme element, together with programme elements 14.6.3. and 14.6.4., is carried out by the Joint FAO/ECE Working Party on Forest Economics and Statistics which normally meets biennially (in 1991, in 1993, etc.). In doing so, it co-operates with the Conference of European Statisticians.

14.6.2.1. Organization and periodicity of statistical data collection and dissemination

Description: The Working Party reviews periodically the Committee's programme for the collection and dissemination of statistical data, to ensure that it corresponds with the needs of Governments.

Work accomplished and to be undertaken:

(a) The Working Party formulates proposals for improving the Committee's programme of collection and dissemination of statistical data, with regard to its organization, method of collection, periodicity, and the improvement of the accuracy and comparability of data obtained from and used by Governments. Countries will review the procedures for filling in and returning the FAO/ECE Forest Products Questionnaires with a view to improving, where necessary, the punctuality and completeness of their replies;

(b) The Working Party will make recommendations as appropriate, as regards the classification and definitions in the field of forest products, to improve the comparability of data and the usefulness of the statistical system as a whole; the secretariat will make proposals to the Working Party's eighteenth session for the revision of the FAO/ECE Classification and Definitions of Forest Products;

(c) The secretariat in collaboration with FAO will transmit to the Customs Cooperation Council (CCC) the Timber Committee's position on revisions to the Harmonized System, namely to reinstate the division of industrial wood in the rough into "sawlogs and veneer logs", "pulpwood" and "other", and will participate in appropriate CCC meetings.

Duration: (a) and (b) continuing, (c) Two years: 1991-1992.

14.6.2.2. Conversion factors

Description: The Working Party reviews the conversion factors (raw material input/product output) for forest products applicable to individual countries, in order to facilitate international comparison of yields and to ensure that the conversion factors used by the secretariat in its analyses reflect current technology.

Work accomplished and to be undertaken: The Working Party reviews at four-yearly intervals (1993, 1997, etc.) conversion factors communicated by Governments in reply to a questionnaire. The results of the 1989 enquiry were published in 1990.

Duration: Continuing.

14.6.2.3. Productivity in the forest sector

Description: The Working Party collects statistics on and analyses trends in productivity in the forest sector. The purpose is to provide information on the inputs of labour, capital, raw materials and energy in relation to outputs in member countries to assist Governments and other decision-makers in their policies towards the forest sector and in finding the appropriate solutions to technical and economic problems.

Work accomplished and to be undertaken: A study on productivity, profitability and relative prices in the forest industries of the ECE region was reviewed by the Working Party, revised and published. A study on productivity in forestry, prepared by the CEA will be presented to the Working Party at its nineteenth session. The secretariat will explore with the CEA the possibility of extending the country coverage of the study. A team of specialists will review the question of productivity and profitability in the forest industries and formulate recommendations for the eighteenth session of the Working Party in 1991.

Duration: Two years 1992-93.

14.6.2.4. Forest fire statistics

Description: The Working Party seeks to facilitate the exchange of information on forest fires, their causes and methods of prevention and protection and the costs involved.

Work accomplished and to be undertaken: Annual enquiries on forest fires are circulated and the results are published.

Duration: Continuing.

14.6.2.5. Methodologies, including projection and modelling techniques, and data bases for long-term outlook studies for the forest and forest products sector

Description: Methodologies, including projection and modelling techniques, and the data bases needed for the analysis of long-term trends and prospects, will be refined and strengthened to prepare for future work that may be undertaken by the European Forestry Commission and the Timber Committee on monitoring developments in relation to forecasts in the latest study and to prepare for the next long-term study. This will improve the reliability of information available to Governments and other decision-makers needed for the formulation of policies towards the forest and forest industries sector.

Work accomplished and to be undertaken: A team of specialists has prepared recommendations on methodology for the next outlook study, and on necessary action to improve the data base. The team will continue to advise the secretariat during the preparation of the study. A workshop on wood supply forecasting methodology was held in Sweden in 1990.

Duration: Three years 1989-1991.

14.6.2.6. Roundwood price statistics and specifications

Description: The Working Party improves the coverage of roundwood prices and the comparability of series in the Timber Bulletin and other international publications, by providing precise specifications for them. The objective is to improve the accuracy of studies by international agencies, Governments or research institutes which use roundwood price series.

Work accomplished and to be undertaken: A team of specialists made proposals to the Working Party's seventeenth session. On the basis of these proposals the team will finalise the questionnaire and start to collect price data from all participating countries. If the eighteenth session considers this pilot phase to be successful, the new international roundwood price information collection system will be managed by the ECE/FAO secretariat starting in 1991.

Duration: Two years 1990-1991.

14.6.3. Forest resource analysis

Description: The Working Party reviews methods of forest inventory used by Governments and by the secretariat to ensure that all parameters relevant to measuring actual productive potential of the forest, as well as parameters measuring change, both for wood and non-wood benefits, are taken into account and that the methods adopted correspond as closely as possible to the needs of all users.

Work accomplished and to be undertaken: A second ad hoc FAO/ECE meeting of experts took place (September 1989) on global forest resource assessment at which proposals were considered for the enquiry and definitions for the 1990 world forest resource assessment. After submission for final approval by the seventeenth session of the Working Party, the enquiry relating to temperate-zone forest resources was circulated in spring 1990. This project is linked with projects 14.5.1 and 14.6.4. An ad hoc meeting will review the preliminary results of the assessment in 1991, after which they will be revised and published.

Duration: Three years 1989-1991.

14.6.4. Transfer of economic and statistical methods and experience in the forest and forest products sector

Description: The Working Party contributes to the building up of statistical services in countries inside and outside the ECE region through the transfer of know-how and experience in methods of data collection, assembly and dissemination in the forest and forest products sector.

Work accomplished and to be undertaken: Participation of experts from other regions in Working Party activities is encouraged. An ad hoc meeting on assessment of the different functions of the forest will be held, subject to a country offering the necessary facilities (linked with projects 14.5.1 and 14.6.3). Arrangements have been made for interested experts in developing countries to receive Working Party documentation. At its eighteenth session the Working Party will consider whether to hold a seminar on forest and forest products statistics in the ECE region.

Duration: Continuing.

ANNEX II

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995

Programme element	1991	1992	1993	1994	1995
<u>PROGRAMME 14: TIMBER</u>	49th session of Timber Committee	50th session of Timber Committee	51st session of Timber Committee	52nd session of Timber Committee	53rd session of Timber Committee
	Study tour in Portugal (jointly with FAO European Forestry Commission)	Study tour in the Czech and Slovak Federal Republic	Study tour in 1/ Study tour in	Study tour in 1/ Study tour in	Study tour in 1/ Study tour in
<u>SUB-PROGRAMME 14.1: MEDIUM- AND LONG-TERM TRENDS, PROSPECTS AND POLICIES FOR FORESTRY AND FOREST PRODUCTS</u>					
14.1.1.	Appraisal of long-term timber trends and prospects				
	Preparatory phase of fifth study of European timber trends and prospects (ETTS V)				
14.1.2	Medium-term trends in industry structure and markets in specific forest products sectors	Statistical data of the survey on the structure of the sawmilling industry	Sawwood and sawlogs including survey on the structure of these industries	Wood-based panels, including survey on the notably pulpwood and wood for energy	Sawwood and sawlogs
14.1.3.	Trends, prospects and policies in forestry and forest products in southern Europe	As determined by the Committee			
<u>SUB-PROGRAMME 14.2: CURRENT FOREST PRODUCTS MARKET DEVELOPMENTS AND SHORT-TERM PROSPECTS, INCLUDING INTERNATIONAL TRADE</u>					
14.2.1.	Review of production, trade, consumption and prices of forest products	Continuing: annual review by Committee of short-term prospects; preparation of Annual Forest Products Market Review			

1/ Host country to be decided.

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995 (cont.)

Programme element	1991	1992	1993	1994	1995
<u>SUB-PROGRAMME 14.3: FOREST TECHNOLOGY, MANAGEMENT AND TRAINING</u>					
((Covers the activities of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training))					
	10th session of Steering Committee in Denmark 2/	19th session of Joint Committee in USSR 2/	11th session of Steering Committee in ... 1/	20th session of Joint Committee in ... 1/	12th session of Steering Committee in ... 1/
	Workshop in ... 1/ to provide guidelines for assistance to eastern & central European countries in transition				
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14.3.1	Silvicultural operations and general management aspects				
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14.3.1.1	Development and use of methods and equipment for silvicultural operations, including stand establishment and multiple use forestry	Team of specialists on afforestation techniques to draw up a proposal for the seminar in 1994 for approval by 19th session	Seminar in France on forest seed collection, treatment & storage	Seminar in ... 1/ on afforestation techniques on abandoned agricultural land	Seminar in ... 1/ on techniques for safeguarding the survival & recovery of forests threatened by air pollution
		Team of specialists on site damage risks to draw up proposal for 10th session of Steering Committee			
		Team of specialists on Model Forest Damage Manual will complete the Manual and a framework for reporting on experience in dealing with catastrophes to submit to the 19th session			

1/ Host country to be decided.
2/ Subject to confirmation.

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995 (cont.)

Programme element	1991	1992	1993	1994	1995
14.3.1.2 Forest fire prevention and control	Enlarged meeting of team of specialists in Italy or Poland <u>2/</u> on forest fire detection equipment				
	Seminar in Greece, in collaboration with FAO Silva Mediterranea, on forest fire prevention: land use and people				
	Biannual publication of International Forest Fire News				
14.3.1.3 Methods and procedures for the preparation and implementation of forest management plans		Seminar in Sweden on forest management and data processing <u>3/</u>			
14.3.2 <u>Wood harvesting and transport</u>				Seminar in ... <u>1/</u> on topic to be decided	Seminar in ... <u>1/</u> on topic to be decided
14.3.2.1 Development and use of harvesting machinery and systems	Seminar in Denmark on thinning operations	Seminar in the USSR on the use of multifunctional machinery and equipment in logging operations	Seminar in ... <u>1/</u> on forest operations necessary & admissible in protected areas		
14.3.2.2 Forest roads & transport of wood raw material	Further activities to be decided by 10th session of Steering Committee				

1/ Host country to be decided.

2/ Subject to confirmation.

3/ Title to be determined.

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995 (cont.)

Programme element	1991	1992	1993	1994	1995
14.3.3 Vocational training, applied ergonomics, occupational safety and health					
14.3.3.1 Vocational training in forestry	Seminar in Spain on vocational training in Mediterranean countries	Seminar in USA ^{2/} on the future of the forestry workforce in the ECE region		Seminar in Switzerland ^{2/} on topic to be decided (or in 1995)	Seminar in ... ^{1/} on topic to be decided
14.3.3.2 Applied ergonomics, safety and health in forest operations			Seminar in ... ^{1/} on topic to be decided		
14.3.3.3 Transfer of technical information and experience	Publication of seminar proceedings; provision by seminar host countries of fellowships for participants from developing countries				Task force to assist developing countries in the event of forest catastrophes (linked to 14.3.1.1.)
<u>SUB-PROGRAMME 14.4: ECONOMIC, TECHNOLOGICAL AND MANAGERIAL ISSUES FOR THE WOOD-WORKING INDUSTRIES</u>					
14.4.1. Development and introduction of new technologies and management methods in the wood-working industries, including furniture	Seminar in Poland on new technologies and applications in the wood-based panels sector				
14.4.2. Development of new products, markets and applications for forest products		Seminar in ... ^{1/} on a topic related to the markets and utilization of hardwoods			

^{1/} Host country to be decided.
^{2/} Subject to confirmation.

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995 (cont.)

Programme element	1991	1992	1993	1994	1995
14.4.3. Energy conservation and self-sufficiency in the mechanical wood-processing industries	As decided by the Committee (meetings of team of specialists every 1-2 years)				
		Seminar in ... 1/ on choice of technologies for combustion of wood and bark in the forest industries (or 1993)			
14.4.4. Programme of assistance to the economies in transition in eastern and central Europe	Missions of experts, informal meetings, study visits, training courses and exchange of information				
14.4.5. Competitiveness of sawnwood	Preparatory meeting to draw up proposals for the seminar in 1992				
		Seminar in ... 1/ on competitiveness of sawnwood (or in 1993)			
SUB-PROGRAMME 14.5: ENVIRONMENTAL AND RESOURCE CONSERVATION ISSUES					
14.5.1. Quantification and evaluation of the environmental benefits of forests	Carrying out of relevant part of 1990 forest resource assessment (see 14.6.3.)				
14.5.2. Economic, silvicultural, ecological and technical problems of the rational use of forest biomass	Further work as decided by 49th session of Timber Committee				

1/ Host country to be decided.

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995 (cont.)

Programme element	1991	1992	1993	1994	1995
14.5.3. Implications of air pollution and other damage to forests for wood supply and markets	Annual review by teams of specialists (1991 meeting in Germany in conjunction with FAO ad hoc Working Group: Impact of Air Pollution on Forests)				
14.5.4. Information exchange on countries where sudden and severe damage to forests occur should send an assessment of such damage to the secretariat and severe damage to forests					
14.5.5. Problems in the forestry and forest industry sector arising from radiation contamination	Meeting of team of specialists. Further work as decided by 49th session of Timber Committee				

SUB-PROGRAMME 14.6: FOREST AND FOREST PRODUCTS ECONOMICS AND STATISTICS

14.6.1. Publication of the Timber Bulletin	(Includes the main activities of the Joint FAO/ECE Working Party on Forest Economics and Statistics)	18th session of Working Party	19th session of Working Party	20th session of Working Party	
		Volume XLIV	Volume XLVI	Volume XLVII	Volume XLVIII
	(Nine issues a year, two containing annual and quarterly statistics on production and trade, one containing trade flow data, two containing price data, two containing market reviews, one the Timber Committee Yearbook and one special issue)				
14.6.2. Selected problems of economics and statistics of forestry and forest products					
14.6.2.1. Organization and periodicity of data collection and dissemination	Continuing review at each session of the Working Party				
14.6.2.2. Conversion factors			Four-yearly survey at 19th session and publication in 1994		

TABULAR PRESENTATION OF TIMBER COMMITTEE PROGRAMME OF WORK FOR 1991-1995 (cont.)

Programme element	1991	1992	1993	1994	1995
14.6.2.3. Productivity in the forest sector	Team of specialists to formulate recommendations to 18th session of Working Party				
14.6.2.4. Forest fire statistics	Publication of results of annual surveys				
14.6.2.5. Methodologies, including projection and modelling techniques, and data bases for long-term outlook studies for the forest and forest products sector	Team of specialists to continue to advise the secretariat during the preparation of the next long-term study (ETTS V)				
14.6.2.6. Roundwood price statistics and specification	Finalization of questionnaire and network of correspondents by team of specialists Regular collection and publication by secretariat				
14.6.3. Forest resource analysis	Forest Resource Assessment 1990: enquiry, collation and publication of results. Review meeting of preliminary results (1991)				
14.6.4. Transfer of economic and statistical methods and experience in the forest and forest products sector	Participation of experts from other regions, notably in projects 14.5.1. and 14.6.3., will be encouraged. An ad hoc meeting on assessment of the different functions of the forest will be held, subject to availability of host and forest products sector				

ANNEX III

PROVISIONAL LIST OF MEETINGS IN 1991 AND 1992 FALLING WITHIN
THE TIMBER COMMITTEE PROGRAMME OF WORK

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE as well as from other countries that are members of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them), while meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists.

1991

<u>Date</u>	<u>Location</u>	<u>Title</u>
21-22 February	Freiburg, Germany	EFC <u>ad hoc</u> Working Group "Impact of Air Pollution on Forests" and Timber Committee team of specialists on the implications of air pollution and other damage to forests for wood supply and markets (B)
10-11 April <u>1/</u>	Geneva	Timber Committee Office Holders (B)
5-11 May	Portugal	ECE Timber Committee/FAO European Forestry Commission study tour : Forest resources and industries in Portugal (A)
20-24 May	Gdansk, Poland	Seminar on new technologies and applications in the wood-based panels sector (A)
22-23 June	Copenhagen, Denmark	Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 10th session (B)
24-28 June	Hillerod, Denmark	Seminar on thinning operations(A)
26-30 August	Geneva	Joint FAO/ECE Working Party on Forests Economics and Statistics, 18th session, including 3rd FAO/ECE <u>ad hoc</u> meeting of experts on Global Forest Resource Assessment (A)
7-11 October	Geneva	ECE TIMBER COMMITTEE, 49th session (A)
29 October- 2 November	Athens, Greece	Seminar on forest fire prevention: land use and people (A)
25-29 November	Bilbao, Spain	Seminar on vocational training of forest workers oriented to the specific needs and conditions in the Mediterranean region (A)

1/ Subject to confirmation

1992

<u>Date</u>	<u>Location</u>	<u>Title</u>
April (dates to be confirmed)	Geneva	Timber Committee Office Holders (B)
4-8 May <u>1/</u>	USA <u>1/</u>	Seminar on the future of the forestry workforce in the ECE region (A)
May	Czech and Slovak Federal Republic	ECE Timber Committee study tour (A)
June	USSR	Seminar on the use of multifunctional machines and equipment in logging operations (A)
June <u>1/</u>	USSR <u>1/</u>	Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 19th session (A)
September	Sweden	Seminar on forest management and data processing (A)
12-16 October	Geneva	ECE TIMBER COMMITTEE, 50th session (A)
(Undecided)	(Undecided)	Seminar on choice of technologies for combustion of wood and bark in the forest industries (A)

1/ Subject to confirmation.

ANNEX IV

ACTIVITIES IN SUPPORT OF ECONOMIES IN TRANSITION

Report by Mr. E. Moskov (Bulgaria),
Vice-Chairman of the Committee

Introduction

In response to Commission decision D(45) and in accordance with the suggestions of the joint meeting of the Timber Committee office-holders and the Executive Committee of the EFC, consultations have been held among representatives of the economies in transition, as to what activities might be undertaken under the auspices of the Timber Committee. Written comments were requested in August, and a meeting was held on the morning of 8 October. The proposals below have been prepared after consultation with the delegations of the countries concerned.

Choice of topics

The first step was to choose topics which were relevant to the very special needs of the countries in transition and on which effective action could be undertaken under the auspices of the Timber Committee. It was felt that the most urgent need at present was to have access to relevant experience in the market economies so that political and administrative choices are made with the best possible knowledge of their likely consequences. Negative experiences could thus be avoided and good examples followed, where appropriate to the circumstances of each country. Another need of a more long-term nature is for training, at every level.

Although it is clear that large-scale, expensive projects e.g. concerning major investments, will be necessary, it was felt that the Timber Committee was not the appropriate organ for the managing of "heavy" projects of this type.

After consultations, the following list of topics is proposed:

A. Administrative aspects

- A.1 Institution building in the forest and forest products sector
- A.2 The role of government agencies vis-à-vis the forest and forest products sector in the market economy system
- B. Concrete problems affecting the forest and forest industries sector
- B.1 Privatisation in the forest and forest industry sector
- B.2 Costing and pricing of forest products
- B.3 Assessment of investment needs for the forest and forest industry sector
- B.4 Market research, market development, marketing and distribution of forest products
- B.5 Rational utilization of forest products in a free market economy
- B.6 Joint ventures in the forest industry sector

C. Training

C.1 Management training for the forest industries

C.2 Development of effective systems for training in technical skills in the forest industry and trade sector

D. Environmental protection

D.1 The forest and forest industry sector in areas contaminated by radiation

D.2 Forest damage attributed to airborne pollution

E. Standards, certification, grading and quality control of forest products

Methods of work

In present circumstances, it is desirable to define methods of work, in a flexible way, on a case-by-case basis. In most cases, as the primary objective is exchange of experience, little organisation will be needed. For most of the above topics, an appropriate method would be a mission of experts. A small group of experts from one or more market economy countries would visit a country in transition (or possibly two countries) for 1-4 weeks, be briefed on the situation, present their own experience and prepare recommendations on the topic under consideration. For some topics it might be appropriate to organize an informal workshop, leaving sufficient time for discussion (i.e. to keep formal presentations to a minimum), or for experts from transition economies to visit market economy countries.

Under training (Area C, especially C.1), it would be necessary to arrange courses for longer periods (up to 1-2 years), in addition to shorter courses.

There is also a need to have access to information in written form. This could include provision of various important documents (e.g. forest laws and regulations, codes and standards) by market economies, and access to computerized information systems. In addition, the secretariat should maintain and make available as appropriate the written results of the various activities.

It will be noted that the methods proposed above are flexible and entail rather little expenditure (with the possible exception of the training programmes). For instance the local costs of a mission of experts would probably be borne by the country(ies) visited and the main contribution of the market economy country would be the expert time (1 or 2 months) and travel.

Financing would be arranged on a case-by-case basis. Possible sources would be the various governmental funds specially set up in recent months, the regular budgets of agencies concerned, international agencies like FAO, ILO, the recently founded European Bank for Reconstruction and Development (BERD), or commercial firms.

The role of the Timber Committee and its secretariat would be to encourage the necessary contacts, initiate activities, participate when possible, distribute results, and oversee the programme as a whole.

Procedures

The first step for countries wishing to participate in this programme (countries in transition and market economy countries) would be indicate to the secretariat which of the topics listed above is of interest to them and any proposals they might have for undertaking particular activities. The secretariat would then help them to carry out the proposed activities, notably by bringing together countries interested in a particular topic and helping with contacts and suggestions to the extent possible.

The carrying out of the individual projects would be under the responsibility of the countries concerned, which would however report on results to the Timber Committee.