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CENTRE FOR CO-OPERATION WITH NON-MEMBERS
DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INDUSTRY

WORKSHOP ON THE SITUATION IN THE STEEL INDUSTRY IN THE NIS

SUMMARY RECORD

The Workshop was held in Paris on 2-3 November 1999.

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SUMMARY RECORD OF THE WORKSHOP ON THE SITUATION OF THE STEEL INDUSTRY IN THE NIS

OECD, PARIS, 2-4 NOVEMBER 1999

I. Executive Summary

1. The Workshop on the Situation in the Steel Industry in the Newly Independent States of the former Soviet Union (NIS), organised by the Steel Committee within the framework of the Organisation's programme on non-Member economies attracted 140 participants. Participation included representatives from Belarus, India, China, Kazakhstan, Romania, Russia the Slovak Republic and the Ukraine as well as from international organisations such as the EBRD, the International Iron and Steel Institute and the Trade Union Advisory Committee (TUAC) to the OECD (see Annex 1: List of participants).

2. In their opening statements, both the Chairman of the Steel Committee, Ambassador Hans Colliander from Sweden and Mr. Rizaburo Nezu, Director of the Directorate for Science, Technology and Industry, emphasised the importance of non-Member activities within the Steel Committee's work programme and, more generally, within the OECD's mission.

3. In light of the difficult economic situation in the NIS, the two-day meeting examined specific problems hampering the development of the steel sector in the NIS. The progress made in restructuring, financing issues related to the restructuring and modernisation of the NIS steel industries, and frictions in the steel trade between the NIS and OECD Member countries were addressed, and ways and means explored for an intensified co-operation between OECD and the NIS in the steel sector.

4. The workshop revealed that the NIS countries are recovering from the collapse of domestic steel demand. Strong increases in Belarus, Russia and the Ukraine may result in a decline of steel exports from these countries thereby reducing the pressure on the international steel trade. The restructuring process of the steel industry in the NIS is underway. However, in these countries obsolete equipment and installations are only gradually being eliminated. Several moderate modernisation programmes are taking place. Restructuring appears to be a slow and difficult process as it implies not only very high investments but also severe work force adaptation problems. Banks and institutional investors are willing to engage in the modernisation and development of the steel industry in the NIS provided the companies establish viable business plans and modern management. Existing co-operation between the OECD and the NIS in the steel sector was welcomed and needs to be continued and expanded.

5. Despite improvements in the steel market, trade tensions remain high, due to low prices for steel products, high import penetration rates in several OECD countries and the permanent problem of global excess capacity. A global solution to these problems calls for a multilateral approach.

6. A list of the background documents and papers, which were prepared for this workshop, is attached as Annex 2.

II. General Overview of the Economic Situation and of the Steel Sector in the NIS

7. Mr. Mannato, OECD Secretariat, made a presentation on global steel market developments. The presentation showed that the economic crisis that affected Russia and several other NIS in the summer of 1998 resulted in a decrease of GDP by 1.6% for the whole area that year. Apart from Russia, the states most affected were the Ukraine, Kazakhstan and Moldova. Belarus moved out of recession in 1996, but GDP growth has been declining since 1998. While Russia may enter into positive GDP growth already this year, the economic situation in the Ukraine and Kazakhstan will improve in 2000.

8. Global steel consumption and world crude steel production in 1999 are expected to decrease by 0.7% or 5 million tonnes largely as a result of a decline in the OECD area. World steel trade will shrink by 7% with diminishing exports from OECD Members (-10.5%), China and Asian countries, while exports from the NIS will almost maintain their 1998 level. In the NIS area, domestic steel demand will grow by around 6.5 million tonnes or 30% and crude steel production by 10.6 million tonnes or close to 14%.

9. In 2000, world steel consumption is expected to increase by 4.3% driven by accelerated growth in Asian countries and the NIS. In the OECD area, the increase may reach a level of 2%. Production will increase worldwide, at a pace according to that of consumption. World steel trade, in terms of volume, is expected to stabilise. In the NIS, exports should decline by 6%, while imports should pick up slightly.

10. World steelmaking capacities are growing, exceeding world steel production by around 300 million tonnes in 1999. Capacities will continue to grow in non-OECD countries, particularly in the non-OECD market economies.

11. The Delegate of the Russian Federation highlighted that domestic steel consumption, which started to grow in 1998, will continue to increase this year and is expected to increase by 2% in 2000 due to the positive developments in steel-consuming industries. In the framework of the current modernisation programme, steel production will be expanded and shifted from open-hearth furnaces to cleaner technologies. While capacities will be expanded in the period from 2000 to 20002, the capacity utilisation rate is expected to augment from its actual level of 66.3%. Exports in 1999 will increase, but this increase will not outweigh the reduction in exports of 5 million tonnes that occurred from 1997 to 1998. In the medium-term, exports will decline as a result of increasing domestic consumption.

12. The representative from Belarus reported that the Byelorussian Steel Works (BMZ) were the only metallurgical enterprise in the country. Production in 1998 was at 1.4 million tonnes corresponding with a capacity utilisation rate of 100%. While 72% of production is exported including 21% that is exported to other NIS, such exports do not have an impact on the international steel trade given their small volume. The Byelorussian steel policy is directed towards the modernisation of BMZ and, more specifically, towards energy conservation and quality improvement.

13. The Delegate of the Ukraine pointed to the historical low in domestic steel consumption in 1998. However, the situation is improving, and both consumption and production are expected to increase in 1999. While consumption in the first nine months of the year was up 10%, production in the first nine months of 1999 was up 7.6% (20 mt) when compared with the same period of the previous year. Exports are increasing by around 27% with particularly strong increases of shipments to South East Asia and the Near East. Capacity utilisation remained low in 1998 spanning levels between 32.7% (tube works) and 62% (steel melting machines). The "National programme for the development of the mining and metallurgical complex to the year 2010" will push ahead the restructuring of the steel sector by making the plants more competitive and idling obsolete capacities. As a result of this programme, the gap between production and domestic consumption will be diminished, and exports reduced.

14. The representative from Kazakhstan emphasised the role of the country as a major supplier to international metal markets. Steel production in the first nine months grew by 27% reaching a level of 3.8 million tonnes. While domestic demand is growing strongly, exports to Russia remain a significant item. The government is supporting the development of the steel sector in the framework of its general strategy to attract foreign direct investment. A broad range of incentives is provided to investors. Such supports should foster the modernisation of the steel sector and its specialisation in high quality special steels.

15. The discussion of the statements presented under this session focused on the impacts of growing domestic steel demand in the NIS on steel exports from these countries and on the ongoing process of restructuring in the NIS. It was felt that the progressive decline of NIS steel exports would help to overcome the crisis in international steel trade. With respect to restructuring, the need for a refined concept of excess capacity was voiced. Questionmarks were made concerning the strategy of keeping reserve capacity. Capacity decisions should in every case be built on viability considerations.

III. Specific Problems Hampering the Steel Industry's Development in the NIS

A. Restructuring of the Steel Industry in the NIS

16. Mr. Mangan, Consultant, introduced this section by making a few general comparisons between "western-style" restructuring based on a sectoral approach and involving pro-active government intervention, if necessary, and the restructuring approach applied in the NIS. In the NIS, the emphasis of restructuring is on the creation of an enabling environment of privatisation and competitiveness, within which *ad-hoc* enterprise level problems are addressed. The lack of corporate governance emerging from the structures has strengthened the role of managers and may be the principal reason for delayed restructuring and less efficiency. Governments are keeping alive an obsolete industrial structure, rather than setting a strategy on a course toward efficiency. Moreover, it is not likely that restructuring assistance will come from abroad. Due to many factors, long term direct investment and lending from international institutions has declined sharply.

17. The Delegate of Russia drew the attention of participants to the outcome of the federal modernisation and restructuring programme for the period from 1993 to 2000. In the context of this programme, outdated capacity in the order of 30 million tonnes was closed down. Moreover, capacity utilisation went down significantly. According to the new modernisation programme covering the period from 1998 to 2005 all open hearth furnaces shall be replaced by the year 2005. To date, 90% of the Russian metallurgical companies have been privatised. However, the downsizing of the labour force lacks far behind the downsizing of production. R&D activities of steel companies are supported by the government but such assistance decreases considerably. The EU under the TACIS programme and the World Bank contributed to the technological restructuring of the industry. In addition to these general comments a representative from the company "Severstal" provided detailed information on the technological restructuring of his company. Until 2005, Severstal will implement 40 projects, which will require third-party financing in the order of USD 300 million.

18. The Delegate of the Ukraine stressed that according to an evaluation of the restructuring costs of the mining and metallurgical sector an amount of USD 7.5 billion will be required in the period until 2009; 50% of that amount should be generated through the privatisation programme. It will be a major challenge to fund the remaining 50%. The privatisation of the industry is underway. Over the next three years, the role of the government in Ukrainian steel companies will be reduced to the role of a minority shareholder, while full privatisation is envisaged in the longer term. In general, no government assistance is provided to

foster and facilitate the restructuring of the sector. A representative from the Ukrainian steel company "Krivorozhstal" underlined the important role of its Dutch partner in the restructuring process.

19. The representative from the Kazakh steel company "ISPAT KARMET" explained the principal elements of the restructuring of the steel industry in Kazakhstan. In November 1995, the LNM Group acquired 100% of the assets of Karmet, which has a steelmaking capacity of 6.3 million tonnes. Karmet being the only Kazakh steel plant was in extremely difficult economic conditions after the dissolution of the former Soviet Union. Full privatisation, western style management systems and a viable business plan helped the company to obtain a USD 450 million financing package from the EBRD and the IFC allowing for a profound restructuring and modernisation of the company. To date, ISPAT KARMET is among the lowest cost producers in the world, does not receive any kind of subsidies, and compensates high costs of product transportation through cheap costs of raw material transportation. Manpower is being adapted by natural attrition, so workers are not laid-off. As a result, the company continues to suffer from overstaffing. The marketing of products is conducted either through ISPAT INTERNATIONAL or reliable international traders. In response to questions from the floor, the Kazakh representative underlined that ISPAT was involved in many problematic take-overs and finally always succeeded because of its straightforward management philosophy.

20. The representative from the International Metalworker Federation focused his statement on three points: the lack of adequate social provisions to accompany the restructuring, environmental and occupational health and safety issues and, finally, the need for a mechanism to resolve trade problems without recourse to anti-dumping actions. He proposed that the funds currently being used to subsidise energy cost of steel companies should be used for the training of redundant steelworkers, and that the participation of trade unions in the restructuring process should be strengthened.

21. The Delegate of China characterised the developments on the Chinese steel market and the objectives of the restructuring of the steel sector. The growth trend in demand and production is continuing and demand for steel products is expected to be between 115-120 million tonnes in 2000, and 140 million tonnes in 2010. China, the world's largest steel producer with a crude steel production of 114 million tonnes in 1999, is striving for self-sufficiency. According to the 10th five-year plan, the reform of the Chinese steel sector will encompass adjustments at the levels of the industrial structure, product structure, structure of ownership and the structure of the labour force. More specifically, small entities with obsolete equipment will be closed, and the merging of companies to large competitive agglomerates will be pushed. The production will be shifted toward high-tech and high value-added products. By 2007 the number of employees will be reduced from 1.3 million to 0.8 million. Two principal mechanisms will be applied by the government to finance the restructuring of the steel sector: firstly, debts of the companies will be converted into shares owned by the state-owned financial assets management companies and, secondly, the government will support R&D activities in the steel sector with a loan and bond programme in the order of 60 billion RMB. Questions were raised by participants on the import licensing system applied in China.

22. The Delegate of Poland briefly reported on the current restructuring of the Polish steel industry, which has reduced its labour force to 74 000, and is envisaging a further reduction to 39 000 by 2003. Tripartite arrangements between the companies, trade unions and the government will provide support to the concerned workers.

23. Mr. Mangan summarised and concluded this section by stressing the progress made in the restructuring of the steel industry in the NIS and in China, and the outstanding relevance of efficient management and sectoral approaches for successful restructuring. In his view, a multilateral steel agreement could facilitate the restructuring process.

B. Steel Exports in a Difficult World Market

24. Mr. Christmas, Secretary General of the International Iron and Steel Institute, introduced this section. He referred to the negative image of the industry due to the numerous trade cases. He found that three misconceptions related to steel trade had been voiced in the course of the workshop: firstly, aiming at self-sufficiency would have no impact on steel trade; secondly, surplus capacity only exists in net exporting countries; and, thirdly, in the home market of first class, highly efficient steel companies imports are automatically considered as being dumped. According to his figures, steel trade in the 1990s has grown impressively. Almost one-third of global steel production is traded internationally to date. However, in the short-term departures from this trend such as the decline in steel trade since 1997, occur. Due to discrepancies between import and export statistics, and a heterogeneous determination of export destinations, world import figures never match world export figures. Finally, global steel trade figures should be interpreted very carefully, because they do not show the reality of the trade at the level of the relevant product categories.

25. The representative from the Italian company Gruppo MARCEGAGLIA questioned the EU-quotas for Russian hot-rolled coils, which in his view explain the increasing shortage of this product on the EU market, and he requested that the quota should be augmented from 2000. In response to this statement a controversial discussion on the EU-quota system and its possible adjustment took place.

26. The representative from the Russian Union of Metal Exporters reproached the United States and, less overtly, the European Union with protectionism against Russian steel imports. In light of the economic difficulties faced by the Russian Federation through the economic crises in South East Asia and in Russia, a more co-operative approach to the fact of high Russian steel exports could have been expected. In an economic environment where approximately half of domestic trade is carried out by barter trade and bill operations, exports constitute the only source of financing operations and restructuring. The anti-dumping legislation of the United States simply tempts to force Russian exports out of the market, and the EU quota systems only provide a limited framework for establishing the desired trade relations. Russia has comparative cost advantages in terms of energy, transportation and labour costs, which should not be denied by the international steel community. Moreover, Russia has behaved responsibly during the steel trade crisis when exports were reduced. Finally, the perception of steel export as an export of unemployment is not valid. Exports of semi-finished steel, the main Russian export item would generate and not destroy employment abroad. The Russian Federation would be in favour of an international steel conference, which would address the actual problems in the international steel trade with the view to reach an agreement on the broad range of issues currently disturbing the sound development of global steel trade. In response to this statement the Delegates of the United States and Canada emphasised the conformity of their trade actions with WTO rules. The Delegate of the Commission of the European Union referred to the provisions of the co-operation agreement between the EU and the Russian Federation. He criticised the Russian export tax on ferrous scrap.

27. The representative from the American Iron and Steel Institute explained that the steel crisis in the United States continues in 1999 with steel imports and job losses in the steel industry remaining at an unacceptably high level. Exports from the NIS were not the only cause of this crisis. State-ownership of steel in China and other non-OECD countries and structural economic failures in Asia exacerbated the long-standing problem of over-capacity. The American steel industry supports a prompt and strict enforcement and the modernisation of trade laws to overcome this crisis. However, they would object to the inclusion of antidumping and countervailing duty laws into the agenda of the millennium round of trade negotiations. In the NIS steel industries the restructuring problems continue to be enormous. The US steel industry is proposing better co-ordination and more effective multilateral governmental and private sector assistance to the NIS. The OECD Steel Committee can contribute further to a better understanding of the problems of global excess capacity and market-distorting practices. The US steel industry welcomes

the focus that President Clinton has given in his Steel Action Program to these problems and urges the Committee to improve the quality of relevant data and engage all major players in a real dialogue and serious discussion of key steel issues. The Delegates from Korea and Japan criticised the characterisation of Japanese and Korean industrial policy respectively, and underlined the necessity to refine definitions of capacity.

28. The representative from the Nippon Steel Corporation highlighted the strongly improving economic conditions in Asian countries. Steel imports to this area were picking up sharply. With respect to NIS exports to the Japanese market it will be essential that these countries provide high quality steel products and services in order to establish a firm position in Japan.

29. Mr. Christmas concluded the section by stressing the legitimacy of the different views that were presented. In his view the customer will decide where and how much steel will be produced. Access to raw material and wages are important factors, but technical support to customers and quality and service would be equally important. Markets should give the adequate long-term price signals which reflect the true value of steel. The problem is short term pricing because of the huge discrepancy between total and variable cost of steel production.

C. Financing Issues in the Steel Industries of the NIS

30. Mr. Beauman from the EBRD introduced this section. He began with the question of why the bank engaged in the restructuring of ISPAT KARMET and why the bank's engagement in the restructuring of the Russian and Ukrainian steel industry was comparatively weak. The considerations of bankers are focused on the long-term viability of companies, and only those companies will get long-term financing from a bank, which demonstrate their long-term viability. In the case of KARMET, low input costs, competent management and a sound commercial strategy had convinced the EBRD. In Russia, corruption constitutes the number-one problem for further economic development. Moreover, persistant problems both at the macro-economic and the company level are holding back banks from further engagements. Such problems relate for example to the tax system, the lack of corporate governance and modern management, barter trading and the general communication problems with NIS companies. In his view, a solution to these problems would be to select a few companies, which in terms of honesty, competitiveness, financial strength and global thinking are the most advanced. These companies should establish business plans on the basis of which decisions on long term lending would be taken.

31. The discussion of the role of international finance institutions in the restructuring of the steel sector in the NIS highlighted the need for foreign long-term financing. In the Ukraine, steel companies did not receive any long-term money from foreign banks during the last three years. Western banks would ask for government guarantees for their lending, which neither Russia nor the Ukraine would be willing to offer. Thus, self-financing through export earnings would remain the most important source of financing the restructuring. A representative from the Russian Federation proposed the implementation of a joint group including representatives from NIS steel companies, international finance institutions and government both from OECD countries and the NIS, which should discuss and evaluate restructuring plans and attract the necessary money for the restructuring.

32. Mr. Beauman concluded that there appeared to be broad agreement on the approach for selecting a few viable steel companies for which restructuring plans should be elaborated. The selection of such companies should be prioritised. He found it very encouraging that NIS companies are making progress in adapting to nternational business practices and confirmed that money for the restructuring would be available provided the companies establish a viable business plan.

III. Co-operation between the NIS and the Steel Committee

33. Mr. Aarts, Commission of the European Union, stated that in his view the co-operation initiatives in support of the steel industries in the NIS had achieved only very little inspite of the considerable amount of money and technical assistance that had been channelled to NIS companies through the EU's TACIS programme. The know-how transfer in the areas of accounting and marketing through workshops, seminars and internships had been far from perfect. He specifically addressed the exclusion of sub-federal level civil servants from such training programmes as a major problem of the TACIS programme. Future assistance programmes should be more selective with respect to the eligibility of companies, better co-ordinated among the donors and recipients and include the benchmarking-approach, which in his view is a unique tool to improve competitiveness of companies. Programmes designed for NIS Government officials should more concretely address structural adjustment issues.

34. The Delegation of the United States outlined its general programme to support and promote the transition to a market economy in the NIS, which addresses among other issues tax policy, international trade law and SME policies. Apart from this general assistance, financial and technical support are provided by the United States. The representative from the Department of Commerce described a new steel-specific programme established with Russia and the Ukraine, which focuses on the training of NIS managers in the areas of pricing, cost accounting and market-oriented business practices. In a second phase, starting early next year, a series of trade law seminars will be organised. So far, co-operation between the United States and Russia and the Ukraine in the framework of this training programme has been very fruitful.

35. The Delegates from Russia and the Ukraine thanked the European Union, the United States and Japan for the various initiatives in support of the NIS steel industries. The assistance had certainly facilitated and fostered the reshaping and restructuring of the steel sector in these countries. A continuation of such assistance would be highly appreciated.

36. In his conclusions, Mr. Aarts proposed to initiate, on a regular basis, an exchange of views between OECD members and the NIS on co-operation in steel restructuring issues, including an evaluation of the initiatives launched. He again voiced the need for a better co-ordination of multilateral and bilateral programmes.

IV. Chairman's conclusions

37. The Chairman of the Steel Committee, Ambassador Colliander (Sweden), stressed that the NIS countries are recovering from the collapse of domestic steel demand. Strong increases in Belarus, Russia and the Ukraine may result in a decline of steel exports from these countries thereby reducing the pressure on the international steel trade. The restructuring process of the steel industry in the NIS is underway. However, in these countries obsolete equipment and installations are only gradually being eliminated. Several moderate modernisation programmes are taking place. Restructuring appears to be a slow and difficult process as it implies not only very high investments but also severe social problems. Banks and institutional investors are willing to engage in the modernisation and development of the steel industry in the NIS provided the companies establish viable business plans and modern management. Existing co-operation between the OECD and the NIS in the steel sector was welcomed and needs to be continued and expanded.

ANNEX 1

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Please inform us of corrections/additions that need to be made to this list. Many thanks.

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ANNEX 2
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COTE	TITLE	On Internet[1]
CCNM/NIS/DSTI(99)26	WORKSHOP ON THE SITUATION IN THE STEEL INDUSTRY IN THE NIS – PROBLEMS AND PROSPECTS	✔
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1. The Internet site is «http://www.oecd.org/dsti/sti/industry/steel/act/wshop/wkshp_index.htm»
Username: NIS_Workshop
Password: steel