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Or. Eng.

**DIRECTORATE FOR SCIENCE, TECHNOLOGY AND INDUSTRY
STEEL COMMITTEE**

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**SUMMARY RECORD OF THE 51ST STEEL COMMITTEE MEETING HELD
AT THE UNION INTERNATIONALE DES CHEMINS DE FER, PARIS,
ON 13-14 NOVEMBER 1997**

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Or. Eng.

SUMMARY RECORD OF THE 51ST MEETING OF THE STEEL COMMITTEE¹

Adoption of the agenda and approval of the summary record of the 50th meeting

1. The Committee adopted the draft agenda [DSTI/SI/SC/A(97)2], and approved the summary record of the 50th meeting of the Committee [DSTI/SI/SC/M(97)1], without amendment.

Comments by the Director of the DSTI

2. Mr. Nezu, the Director of the DSTI, reported on issues related to the OECD budget, which was to be cut by 10 per cent during 1997 to 1999, and other reforms that were being pursued by the Organisation. The 1997 budget, it was recalled, had been reduced by 3 per cent, and a target reduction of 5 per cent had been established for 1998. The programme of work was also under review. While countries had generally assigned lower priority to work on sectoral issues, the Secretary-General had urged that such work be continued. In the case of steel, the Secretary-General had pointed out that the OECD was the only international forum where steel policy issues were being addressed, and that both Member countries and major players that were not Members of the Organisation -- such as China and the Russian Federation -- had expressed their support for the forum.

3. In order to continue, Mr. Nezu noted, the Committee would have to ensure the relevance of its work. This would require that it: (1) review and eliminate items of lesser importance from its activities, (2) identify and address current and emerging issues in a meaningful way, and (3) strengthen work with other OECD committees in areas of mutual interest (as had already been done in trade, environment and relations with non-Member economies).

Conditions in world steel

4. The Secretariat presented a report on global market developments in steel, in which the situation in 1997 and the prospects for 1998 were reviewed. The report indicated that world steel consumption would increase by about 5.4 per cent in 1997, to a record 685.5 million tonnes. Growth would continue in 1998, albeit at a lower rate of 3 per cent. Steel prices, which had generally strengthened during the first half of 1997, were expected to show signs of weakening towards the end of 1997 and in 1998. In the discussion that followed, considerable attention was paid to the effects that the changing economic situation in the Asia-Pacific area might have on steel demand and trade. Already there had been a notable slowing of investment projects in steel facilities.

5. Countries participating in the Committee then discussed the situation in their respective areas. A summary statement on the overall situation was reviewed and approved by the Committee, for release to the public in the form of a press communiqué [see SG/COM/NEWS(97)102].

6. One of the issues discussed concerned the growing role that foreign direct investment was playing in the steel industry. The steel industry had generally lagged behind other sectors in this regard. Expansion of such investment would have a significant effect on the industry as it would facilitate a more

1. The list of those present is contained in the Annex.

profound exchange of knowledge, skills and abilities (in areas such as accounting, marketing, and the like), while increasing competitive pressures in the industry. This was an area to which the Committee should pay more attention in the future, as there would likely be important policy implications.

7. Other issues discussed were as follows:

Central and eastern Europe

8. During the discussion on the situation in central and eastern Europe (CEE), it was observed that steel represented a major industrial sector in the area, and that the viability of the industry depended to a great extent on the ability of the countries in the area to export to western Europe and the United States. This presented a risk to the CEE economies that would only decline if these economies became more diversified.

9. The Delegate of Romania confirmed the risk that his country faced; steel was highly concentrated in the CEE region, and employed significant numbers of workers. In the case of his country, major investment in infrastructure would be made in the future, which would improve domestic demand. In the meantime, the industry would be restructured to enhance its competitiveness. The Delegate of the Czech Republic indicated that the situation was similar in his country. The industry currently had an advantageous cost position due to relatively low labour costs. This was, however, a temporary situation; future competitiveness would depend on the modernisation of the country's mills.

10. The role that foreign investment was playing in the CEE region was also discussed. Recent news had suggested a growing interest from foreign companies. In general, however, the level of investment had not been of the magnitude necessary to have a profound impact. This, it was noted, was probably due in large part to the significant number of workers that would have to be dismissed to increase the efficiency of operations, and the social and political problems this posed to governments and potential investors. The situation was not, however, the same throughout the region. In the case of the Czech Republic, a rapidly growing service sector and new employment opportunities in other industries was absorbing redundant workers in a satisfactory manner. Foreign investment had already occurred, and was expected to play an even greater role when Nová Hut and Vítkovice were privatised; shares in the companies would be placed on foreign markets.

11. In the field of trade, CEE countries had no comment on the role that Russian and Ukrainian steel was playing in their respective economies. One delegate summarised that the NIS economies had probably focused on western Europe, North America and the Asia-Pacific region, in light of the relative strength of these markets, and the opportunities they provided to raise hard currency.

Europe

12. In presenting his report, the Delegate of the European Communities noted that his assessment of market conditions had not taken the possible effects of the financial crisis in the Asia-Pacific area into account. Commenting on the recent increase in merger and acquisition activity in Europe, the Delegate noted that steel companies were rethinking their strategies and had concluded that such combinations were required in order to maintain competitiveness internationally. There were implications for labour, but the existence of social assistance under the ECSC Treaty and the relatively large number of older workers would reduce the impact.

The Americas

13. Commenting on the effect of increased minimill capacity in his country, the Delegate of the United States noted that such effects would be most notable from the fourth quarter of 1997, onward. Additional capacity coming on-stream in 1998 would have further effects. Prices would be under pressure, which was already the case despite the strong market, and imports would most likely decline. Indications from the minimills suggested that exports could rise.

14. The Delegate of Mexico reviewed the situation in Latin America, where steel consumption and production were growing faster than had been anticipated earlier in 1997. Consumption was now expected to increase by 11.5 per cent, to 42.7 million tonnes (on a crude steel basis), while production would climb by 6.5 to 7 per cent, to a record 53.1 million tonnes. With consumption rising, steel exports would fall by about 6.5 per cent, to 18 million tonnes, while imports would rise by 8.4 per cent, to 5.8 million tonnes. With production and consumption continuing to grow in 1998, imports would rise by about 11.9 per cent, with exports to decline by about 3 per cent.

15. In Canada, increased imports of low-priced steel from Russia had been of concern to Canadian steelmakers, who had approached the Government to discuss trade action options which might be appropriate. At the same time Russian industry and Government representatives had met with their Canadian counterparts to discuss the situation. The industry was reportedly interested in the negotiation of price-quantity restrictions for flat-rolled products. Antidumping actions were not currently being contemplated. The Russian side was nonetheless concerned that antidumping actions could be taken in the future, and that these would effectively block access to the Canadian market. This had in fact occurred as the result of a successful antidumping case filed on steel plate. No formal proposals or decisions had, however, been made, nor had the Canadian Government taken a position on the issue.

Asia-Pacific area

16. Delegates commented on the effects of the currency crisis on steel trade and investment in the Asia-Pacific area. There did not yet appear to have been any growth in protectionist tendencies in the area, nor was any such shift foreseen in the short or long run. In fact, the Delegate of Korea reported, efforts to liberalise trade were being pursued. To this end, Korea had tabled a proposal for further liberalisation in steel industry in the context of APEC.

17. In summing up, the Chairman concluded that organising the discussion on the market and industry situation on a regional basis had been successful as it had enhanced discussion. He proposed that the format be continued, and that countries take an even more active role in posing questions and expressing views in future meetings.

The situation in the NIS area

18. The Committee discussed the situation in the NIS area, in support of which the Secretariat had prepared a background document on recent developments [DSTI/SI/SC(97)31]. The Chairman recalled that the discussion was to have included the participation of Russian and Ukrainian representatives. Unfortunately, the Russians were unable to attend due to a long-standing commitment. The absence of the Ukrainians was unexplained as officials had recently expressed their intention to attend. The Secretariat confirmed both countries' interest in participating in the Committee. This had been expressed during meetings which had been held with senior officials in Moscow and Kiev in September. While funding was

not seen as an obstacle to either country's participation, the Russian officials were concerned about the lack of Russian interpretation at Committee meetings. In furtherance of closer co-operation, the Ukrainian officials had expressed interest in the organisation of a workshop on steel issues, in Ukraine. The matter was to be reviewed further by the Ukrainians, following which a more formal proposal might be made.

19. In the discussion that followed, the Committee reviewed key trade, market and industry developments involving the NIS economies. Attention was called to the Russian Federation's new restructuring programme for the industry. It was reported that some 80 per cent of the financing for the \$9 billion programme would be raised through revenues from exports. Comments were also made about developments on Russia's steel market. Much of the country's internal steel trade, it was pointed out, was currently in the form of barter transactions; pricing information on domestic sales might therefore be somewhat misleading.

20. In the field of trade, the Delegates of Canada, the European Communities and the United States reported on actions that had been taken, or were being examined, vis-à-vis imports from the NIS area. Issues related to the transport of steel from the NIS area to world markets and the role and techniques used by trading firms were also addressed, as was the character of studies being conducted with the NIS countries under the EU's TACIS programme.

21. In concluding the session, the Chairman noted that the Committee had been able to address issues related to NIS steel in a satisfactory, if not somewhat unilateral, fashion. It would have been more effective for all concerned, however, if NIS officials from Government and industry had been able to participate in the discussion. He hoped this would be possible in the future.

Recent policy developments

22. Delegates discussed recent policy developments in their respective areas. Information was provided by the Delegates of Brazil, Canada, the Czech Republic, the European Communities, Korea, Romania, the Slovak Republic and the United States². Following the discussion, the Committee considered a document prepared by the Secretariat on developments in the non-Member economies in the Asia-Pacific area [DSTI/SI/SC(97)33]. Interest was expressed in the analysis that had been done on the role of foreign investment in the steel industries in this area. It was noted that further work, which examined such investment on a product-by-product basis, and which examined instances where planned investments had been cancelled, would also be of interest. In support of further work, Delegates could provide background information to the Secretariat.

23. In the field of multilateral issues, the Delegate of the United States indicated that no meetings on multilateral steel agreements had been held since the last Committee meeting, nor were any foreseen.

2. Further information on the discussion under this item is contained in document DSTI/SI/SC(97)54, *Recent Policy Developments: Summary of discussion at the 51st Steel Committee meeting, held on 13-14 November 1997*.

Activities with non-Member economies

Recent developments

24. The Secretariat reported on developments vis-à-vis China and India on steel. Both countries had expressed interest in closer co-operation with the Committee. India was considering requesting observership, while China hoped to be included in workshops and related meetings where issues of mutual interest would be addressed. In the case of China, it was agreed that information on steel would continue to be exchanged on an informal basis with the Secretariat. The suggestion that they had made to host a workshop in China had been referred to the Committee. No commitments on such a workshop could be made by the Organisation at this stage, it was pointed out, as the matter would have to be considered in the light of the Organisation's overall programme of dialogue and co-operation with the country. Were a workshop to be held, the Secretariat had noted, it would probably not be possible prior to late 1998 or 1999, at the earliest. The Chinese authorities had also inquired about opportunities for personnel training; the Secretariat had agreed to pass on specific requests to Member countries.

Workshop on steel trade issues

25. The Committee considered the document that had been prepared on the proposed workshop on steel trade issues [DSTI/SI/SC(97)35]. It agreed to the structure of the workshop, as set forth in the document. The Secretariat would modify the programme taking into account the suggestions that had been made, and circulate a revised version to the steering group for final approval. As had been discussed, participants in the workshop would attend in their personal capacity, which seemed to facilitate discussion, and efforts would be made to engage one or more discussants or moderators.

Consultations with the Trade Union Advisory Committee

26. Ms. Mureau of the International Metalworkers Federation presented the opening statement on behalf of the TUAC Delegation.³ In reviewing the current situation, she urged the Committee not to underestimate the effects that the currency and stock market crises in certain Asian countries could have on other countries. At the least, steel demand would probably not grow as much as had been anticipated. She reported on the results of the recently concluded conference that the International Labour Organisation had held on steel, at which globalisation, the increasing average age of the steel workforce, subcontracting and outsourcing, training, and environmental issues were addressed.

27. While an upswing in steel consumption was envisaged, the TUAC was concerned about the ongoing loss of jobs in the sector, a process that was being accelerated by privatisation and mergers and acquisition. The emphasis that privatised companies placed on profits came at the expense of human and social concerns, which were often neglected. The effects on the work force of the growth of outsourcing and subcontracting was an issue of rising concern, as was the need to provide adequate training to both new and older workers. In the field of trade, there was disappointment that there had not been any progress on a multilateral steel trade agreement, and concern that some countries were not respecting their international obligations regarding workers rights.

3. The statement has since been distributed to the Committee as document DSTI/SI/SC(97)53.

28. In its future work programme, the TUAC urged the Committee to focus more on environmental issues, as it was necessary for all countries to assure that companies did not neglect their responsibilities in this area. Further study of the consequences of the growing concentration in the industry was also suggested.

Analytic and statistical work on steel

Capacity

29. The Committee considered reports that had been prepared on capacity developments in non-Member and Member countries, as well as a document providing information on the world steel capacity outlook through 2000 [DSTI/SI/SC(97)36, DSTI/SI/SC(97)37 and DSTI/SI/SC(97)38, respectively]. Revisions to the capacity data for Latin America were being made, in co-operation with Brazil and the Latin American steel association ILAFA. In the case of Brazil, the estimated capacity for 2000 had already been revised downward, to 32.5 million tonnes.

Investment and disinvestment

30. The Committee reviewed the annual report on investment and disinvestment notifications and the report that had been prepared on recent notifications [DSTI/SI/SC(97)39 and DSTI/SI/SC(97)40]. Delegations were asked to review their reporting to assure that it was up-to-date.

Preparation of documents

31. The Committee agreed to the timetables and procedures to be followed in preparing and issuing the press communiqué on the outlook for 1998 [DSTI/SI/SC(97)41], the report on the steel market in 1997 and the outlook for 1998 and 1999 [DSTI/SI/SC(97)42] and the 1996 annual statistical report [DSTI/SI/SC(97)43]. Where questionnaires requested information on future prospects, Delegates were asked to provide as complete information as possible. When requested data were lacking, qualitative information would be appreciated as it could also be used in assessing future prospects, albeit in a less precise manner. One delegate questioned the need to continue to collect information on alloy steel; product developments suggested that the relationship between the alloy and carbon grades had changed, and it may no longer be useful to collect separate statistics.

Enhanced work on steel trade and trade-related issues: Draft guidelines

32. The Committee considered the draft guidelines that had been prepared for the enhanced work that the Committee would be conducting on trade and trade-related issues [DSTI/SI/SC(97)30 and DSTI/SI/SC(97)30/REV1]. The Committee's steering group had recommended that related work that had been done on state aids to steel be abandoned in light of the new initiative. The work on state aids had reportedly come to the attention of the OECD's Working Party on Public Support to Industry. At its recent meeting, the Working Party had noted the need for the Steel Committee to co-ordinate its data request with the Working Party, which had developed a comprehensive methodology for collecting and analysing such information.

33. In the discussion that followed, the Delegate of the European Communities stressed the need to adhere to the definition of subsidies established in the World Trade Organisation. This would assure that countries were on an equal footing for reporting purposes, and that aids at all levels of government (i.e., from national to local levels) would be covered. In the reviews that would be conducted by the Committee at future meetings, it would be important for all countries to have an opportunity to inquire about measures that might not have been reported, and for the reporting countries to respond fully to such inquiries. Finally, it was suggested that information collected on government procurement be expanded to include tenders for material or projects that might not be specifically for steel, but which contained large quantities of steel.

34. The Delegate of the United States supported the guidelines that had been drafted, with one caveat. It would be important to assure that countries participating in the exercise fulfilled their reporting obligations. As for the guidelines themselves, further clarification was necessary in the area of non-tariff barriers, where countries were asked to report on foreign investment policies as applied to steel, to the extent they differed from accepted WTO practices. It would be beneficial to be more specific about the nature of any relevant WTO or OECD guidelines. Finally, the suggestion made by the EC Delegate on expanding the scope of reporting on government procurement would have to be considered further. On this point, the Delegate of Mexico hoped that sub-federal information on government procurement would be covered in reports.

35. The Delegate of Korea suggested that the final questionnaire be more structured, so as to ensure complete reporting. It would also be useful to include a reporting item on MSA and MSSA developments. Doing so could facilitate progress in concluding any multilateral agreement(s).

Other

36. Problems related to the growing difficulties that the Secretariat was experiencing in obtaining data on steel on a timely basis, both from Member countries and from outside sources, were discussed [DSTI/SI/SC(97)44]. It was in everyone's interest that the reports prepared by the Secretariat be as complete and accurate as possible; more timely and complete responses to questionnaires would be helpful in this regard.

Current issues

Steel and the environment

37. The Committee considered two documents that had been prepared on steel and the environment, *Steel and the environment* [DSTI/SI/SC(97)45], which provided a review of recent developments in the field of environment with implications for steel, and *The effects of government environmental policy on costs and competitiveness -- Iron and steel sector* [DSTI/SI/SC(97)46]. In terms of recent developments, one of the key issues discussed was the conference that Parties to the Framework Convention on Climate Change would be holding in Kyoto, Japan, in December 1997. The Committee agreed to consider the results of the conference at its next meeting, in support of which an expert might be invited to provide an assessment to the Committee. Further consideration would also be paid to the report that had been prepared on the effects of government environment policy on the industry.

38. On the matter of waste issues, it was noted that Basel Technical Group had reached agreement on what wastes should be covered by the Basel Convention, and which wastes should not be covered. The Conference of the Parties to the Convention was expected to adopt the recommendations at its February 1998 meeting.

39. The Delegate of the European Communities reported on the implementation of the Directive that the Council had adopted in September 1996 on integrated pollution prevention and control methods. The concept of best available technique (BAT) had been established as the basis for setting emission levels. The Directive had required the Commission to facilitate an exchange of information on BATs and emission limit values within the European Union.

Ferrous scrap: the current situation and the outlook

40. The Committee considered reports on scrap that were made by the Delegates of the:
- European Communities -- on work that was being done on scrap collection issues with the CEE countries, under the PHARE programme;
 - Czech Republic -- on proposed work on issues related to radioactive scrap, under the auspices of the UNECE; and
 - United States -- on rising prices for low-residual scrap (in light of the rising demand from new minimills), and on the country's scrap exports (which had fallen, particularly to the Asia-Pacific area).

Structural adaptation: Issues related to labour adaptation

41. No issues were raised under this agenda item.

Country of origin work

42. The Secretariat reported on the technical work that the World Customs Organisation was conducting on country of origin guidelines. The work was being done on behalf of the World Trade Organisation, which planned to finalise guidelines by 20 July 1998. A number of issues had yet to be resolved in the area of steel. It was not decided, for example, how a steel sheet that was cold-rolled in one country and coated in another would be treated when imported into a third country (for country of origin purposes). The Delegate of the European Communities noted the importance of this issue, and proposed that the Committee discuss origin issues at its next meeting.

Programme of work for 1999 and 2000

43. The Committee discussed issues related to its programme of work for 1999 and 2000 [DSTI/SI/SC(97)34]. Delegates agreed to provide any written comments by 15 February 1998; these would then be reflected in the draft programme to be prepared by the Secretariat. The draft would be considered at the Committee's Spring 1998 meeting.

Export financing for steelmaking plant and equipment

44. Ms. Neimetz of the Trade Directorate introduced the report that had been prepared on official export credits for steelmaking plant and equipment [TD/ECG(97)13].

Other business

45. The Committee considered issues related to the participation of non-governmental officials in OECD meetings [DSTI/SI/SC(97)29], the OECD's new classification system for documents [DSTI/SI/SC(97)50], and future meeting dates. Tentative agreement was reached on dates for the meetings to be held in 1998 -- 27-29 May and 4-6 November. In the event a workshop was not held in conjunction with the November meeting, the number of days for the meeting would be reduced to two.

ANNEX

LISTE DES PARTICIPANTS/LIST OF PARTICIPANTS

REUNION DU COMITE DE L'ACIER/STEEL COMMITTEE MEETING

13-14/11/1997

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Allemagne/Germany	Ms. Brigitte IRSFELD Bundesministerium für Wirtschaft
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	<p>Ms. Nae Hee HAN Advisor</p>
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(Item on Consultations with the TUAC)

Mrs. Anne-Marie MUREAU
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