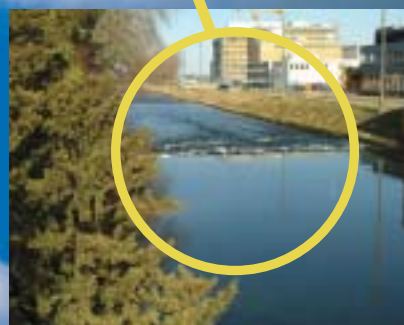
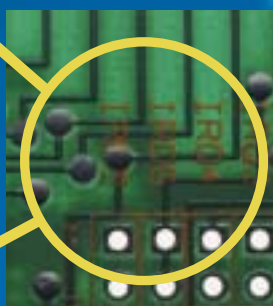
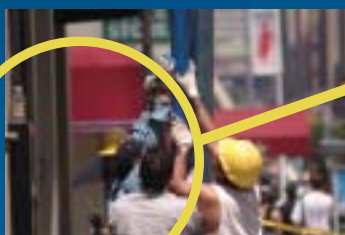


Report 2003-2004



United Nations Economic Commission for Europe



UNITED NATIONS

**United Nations
Economic Commission for Europe (UNECE)**

Report 2003-2004



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Introduction

The first quarter of 2003 was dominated by the concerns linked to a possible war with Iraq. These concerns have had an important impact on both the political and economic situation of the region. In particular, the increase in the cost of energy and the gloomy economic prospects had a slowdown effect on most of the economies of the UNECE region. Paradoxically, once the war had started the economic situation tended to stabilize and the year ends with a surprisingly strong economic recovery in North America. Two elements remained constant, however, throughout the year namely the security concerns and – although somehow reduced due to the rapid ending of the Iraq war – global uncertainties.

Improved expectations for a global cyclical recovery in 2004 – with major regional differences – are not without significant downside risks. Doubts remain about the strength of growth in the United States, on how long it will last, and whether the United States economy will resume its role of engine for world growth. The picture of protracted sluggishness of the European economy in the euro area, and mixed developments in Central Europe, is perhaps improved by a strong economic upturn in the Russian Federation, Ukraine and other economies of the Commonwealth of Independent States (CIS). But there remain many other uncertainties, such as the increase of oil prices, the further appreciation of the euro against the dollar and the yen, and the impact of Asian economies on repairing global imbalances. The answers to these questions will be of key importance in the shaping of the economic situation of the UNECE countries during 2004 and most likely far beyond.

In 2003 the UNECE, thanks to its flexibility, was able to adapt to international developments in the region. In the field of security, UNECE reacted immediately to the energy threats posed by the possibility of war, by organizing together with the Organization of

the Petroleum Exporting Countries (OPEC) a roundtable on energy security with all major stakeholders in this area. The Tenth Ministerial Council in Porto, Portugal, 6-7 December 2002, renewed its commitment to the economic dimension of security and invited UNECE, in close working relation with the Organization for Security and Co-operation in Europe (OSCE), to take the lead in making the economic dimension of security more relevant to conflict prevention and at the same time to contribute to the preparation of the OSCE New Strategy Document. Strengthening the role of UNECE in the economic and environmental dimensions of conflict prevention, and the mandate assumed to be given to develop an early warning system in the economic and environmental dimensions in Maastricht, Netherlands, December 2003, by the Ministers of Foreign Affairs of the OSCE members, will have to be reconsidered at the next UNECE Annual Session in February 2004.

No doubt May 2004 will be a new milestone in European history as it will mark unprecedented European Union (EU) enlargement and close the West, Central and East European divide. Fully in line with its mandate, UNECE is working to prevent a new divide between the EU-enlarged and non-acceding countries. UNECE legal instruments for trade facilitation, transport, energy and environment provide the basis for the further cooperation of non-acceding countries with the enlarged EU as there is a need for non-acceding countries to adopt and implement standards and legislation that is not identical to, but complies with, the EU body of law. UNECE in cooperation with the European Commission (EC) therefore organized in 2003 sectoral “Beyond enlargement” workshops on the impact of enlargement on the energy sector, trade, environment, transport (in cooperation with the European Conference of Ministers of Transport (ECMT)) and on regulatory convergence (in cooperation with the Greek Govern-

ment). It will hold a joint workshop with the OSCE on the economic dimension of security after EU enlargement in early 2004.

In the context of the information society and Information and Communication Technologies (ICT) for development, which is a key concern for all countries, the UNECE was, in 2003, responsible for coordinating the regional commissions' contribution to the preparation of the World Summit on the Information Society (WSIS) Declaration of Principles and Plan of Action, in which the regional dimension of implementation was explicitly recognized. The role of UNECE in Geneva (and from Geneva to Tunis) in preventing or eliminating the digital divide includes the exchange of best practice, providing an assessment of achievements in the knowledge-based economy at country level (14 Country Readiness Assessments Reports have been issued in 2002/03 on "Towards a Knowledge-based Economy"), and implementing a gender perspective in building an information society (Second Forum of Women Entrepreneurs in Geneva, March 2003). UNECE has long and excellent expertise in e-commerce (UN/CEFACT, UN/EDIFACT, UNe-Docs), in e-government, and in collaboration with the Economic and Social Commission for Western Asia (ESCWA) implements the e-Med project funded from the United Nations Development Account. These efforts – as intended – will lead to a regional plan for the information society in 2004/05.

At the World Summit on Sustainable Development (WSSD), Johannesburg 2002, the role of regional commissions in sustainable development was agreed upon. The 2003 Spring Seminar provided momentum to proceed with in-depth discussion on the relationships between growth and environmental degradation, whilst the High-level Segment of the 58th Annual Session underscored the importance of national strategies and the role of regional cooperation to promote national efforts in sustainable development. It was also decided that the UNECE Regional Implementation Forum, as a follow-up to WSSD, would be held in January 2004. The Forum will also renew the organization's preparedness to assist member States in the progress towards sustainable development which assumes the integration of all three dimensions: economic, environmental and social.

Apart from these new undertakings, UNECE has and will continue its efforts in many areas where it has recognized expertise and skills, and has also embarked in emerging areas relating to new regional and global concerns. In doing so, UNECE proves its commitment to multilateral cooperation and works within its mandate to achieve the goals defined in the United Nations Millennium Development Project, and the resolutions of the General Assembly and the Economic and Social Council (ECOSOC), as well as declarations adopted at the United Nations conferences.

UNECE is successfully pursuing its international law-making activities. The fifth Ministerial Conference "Environment for Europe" in Kiev adopted three new protocols to UNECE conventions. At the same time, UNECE increasingly produces "soft" legislation in the form of guidelines, e.g. guidelines for reforming energy prices to meet sustainable development objectives, guidelines on condominiums, on housing finance (forthcoming), for cost-benefit analysis of transport infrastructure projects, for public-private partnerships (PPPs), etc. Guidelines in general are intended to address the main challenges in different UNECE areas and although they do not define standard solutions, they provide a general framework based on experience and best practice for decision-making in the national context.

UNECE has further strengthened its collaboration with United Nations and non-United Nations organizations, country groupings and all relevant stakeholders in member States: governments, civil society and the private sector. Concerning the latter, there is no doubt that UNECE is a leader in building partnerships between the United Nations and the business community in energy, industrial restructuring, trade, transport and the environment. Collaboration with the business sector is indispensable in developing standards and norms (e.g. technical standards for e-business), in discussing how to ensure energy security (a good example is the Gas Centre), and so on. UNECE is a strong advocate for a closer public-private partnership by initiating the network of public-private-units at the national level, drafting guidelines for PPPs and good governance for PPPs. The recent corporate governance failures have put corporate governance reform on the policy agenda.

UNECE has not only analysed developments in improving corporate governance in the *Economic Survey of Europe, 2003 No. 1*, but has decided in cooperation with other organizations (such as the International Chamber of Commerce) to take on board more systematically the issue of good governance in its niche areas such as corporate governance in the energy sector, good governance for SMEs and for PPPs.

The UNECE 2003 and 2004 objectives and targets cannot be achieved without the strong dedication and hard work of the secretariat in servicing intergovernmental bodies, in preparing numerous publications, in developing and expanding analytical capacity, in working on indicators, data collection and databases, and in providing technical assistance to member States particularly in South-

East Europe and CIS. The reform initiated by the Secretary-General in 2002 inspired many reform actions at the level of the secretariat. In 2003, UNECE has continued to strengthen cross-sectoral cooperation by means of cross-dimensional task forces (on information society, on security, and on global public goods for instance), to increase transparency and improve information-sharing in the work of the secretariat and UNECE (by introducing UNECE Weekly, proposing a new knowledge-sharing initiative for government representatives, deepening analytical thinking by brainstorming and new academic discussions, and a fellowship programme). We hope very much that these efforts will allow us to continue responding to the expectations of the member States and reinforce multilateral cooperation in the UNECE region.

Brigita Schmögnerová
Executive Secretary

United Nations Economic
Commission for Europe



Part 1:

The New Geopolitical Reality in the UNECE Region

The joining of ten countries to the European Union (EU) in 2004 is the most important economic and political event facing the UNECE region. The successful completion of the EU accession negotiations confirms the enormous progress in democratization and market reforms which has been under way in the Eastern part of the UNECE region for more than a decade. It is now widely accepted that the process of transition from plan to market by and large is nearing its end in the most advanced countries.

At the same time the region has become more heterogeneous, as transition advanced at varying speeds in the different countries: while a group of advanced reformers are at the doorstep of the European Union, other countries are still struggling with basic systemic and structural reforms. Despite the increasing divergence, all economies and societies, even the highly developed industrialized countries in the UNECE region, are indeed in a process of continuous change. With the upcoming EU enlargement, this process will enter into a new phase: on the one hand, the new EU members will turn a page in their transformation, while, on the other, the new geopolitical realities in Europe will pose new challenges for the economies both within and outside the enlarged EU. The new phase of economic and political change provides an opportunity for UNECE to respond to the challenge by modifying and adjusting its agenda to the new realities.

The economic situation in the UNECE region in the autumn 2003

The global context

Global economic performance improved in recent months, fostering increased optimism about a gradually strengthening recovery in the second half of 2003 and during 2004. Indeed, economic activity picked up in the United States in the second quarter of 2003, albeit strongly influenced by special factors (table 1).

TABLE 1 Changes in real GDP in the developed market economies, 2002-2004

(Percentage change over previous year)

| | 2002 | 2003 | 2004 |
|--|------|------|------|
| France | 1.2 | 0.2 | 1.8 |
| Germany | 0.2 | - | 1.5 |
| Italy | 0.4 | 0.4 | 1.6 |
| Austria | 1.0 | 0.6 | 1.7 |
| Belgium | 0.7 | 0.8 | 1.8 |
| Finland | 2.2 | 1.3 | 2.6 |
| Greece | 4.0 | 3.7 | 3.9 |
| Ireland | 6.0 | 2.7 | 3.9 |
| Luxembourg | 1.1 | 1.5 | 4.0 |
| Netherlands | 0.2 | -0.5 | 1.3 |
| Portugal | 0.4 | -0.5 | 1.6 |
| Spain | 2.0 | 2.1 | 2.8 |
| Euro area | 0.9 | 0.5 | 1.8 |
| United Kingdom | 1.9 | 1.7 | 2.5 |
| Denmark | 1.6 | 1.0 | 2.1 |
| Sweden | 1.9 | 1.5 | 2.3 |
| European Union | 1.1 | 0.7 | 2.0 |
| Cyprus | 2.2 | 2.0 | 3.8 |
| Iceland | -0.5 | 2.3 | 3.7 |
| Israel | -1.0 | 0.7 | 2.1 |
| Malta | 1.0 | 2.8 | 3.8 |
| Norway | 1.5 | 0.6 | 2.3 |
| Switzerland | 0.2 | -0.4 | 1.3 |
| Turkey | 7.8 | 5.3 | 5.0 |
| Western Europe | 1.4 | 0.9 | 2.1 |
| Canada | 3.3 | 2.0 | 3.0 |
| United States | 2.4 | 2.6 | 3.7 |
| North America | 2.5 | 2.6 | 3.6 |
| Japan | 0.1 | 2.5 | 1.9 |
| Total above | 1.7 | 1.8 | 2.8 |
| <i>Memorandum items:</i> | | | |
| 4 major West European economies^a | 0.8 | 0.5 | 1.8 |
| Western Europe and North America | 2.0 | 1.7 | 2.9 |

Source: National statistics; Eurostat; UNECE secretariat estimates; Consensus Forecasts, September 2003; IMF, World Economic Outlook, September 2003; The Economist, 4 October 2003.

Note: All aggregates exclude Israel. Data for 2003 and 2004 are projections or forecasts.

^a France, Germany, Italy, United Kingdom.

But there was also a surprisingly strong rebound of economic growth in Japan and growth was also strong in the Asian emerging markets. In contrast, economic activity in Western Europe stagnated in the first two quarters of 2003, with a number of countries in recession. But in Central and Eastern Europe and CIS, growth has remained buoyant despite the deteriorating external economic environment. In fact, growth was particularly dynamic in the Baltic States and CIS.

Hopes for a global recovery continued to be pinned on a strengthening cyclical momentum in the United States, which would thus continue to be the engine of growth for the world economy. Business and consumer surveys improved somewhat after the rapid ending of the Iraq war.

Hopes for a strengthening of global economic activity are largely based on a considerable monetary policy stimulus in the industrialized countries, with interest rates falling to 40-year lows. Fiscal policy has also been supporting economic activity in the United States and the United Kingdom, but in the euro area, it has been somewhat restrictive, despite the protracted cyclical downturn. The increased optimism of investors about prospects for recovery led to a rally in international equity markets after the unwinding of geopolitical uncertainties.

United States

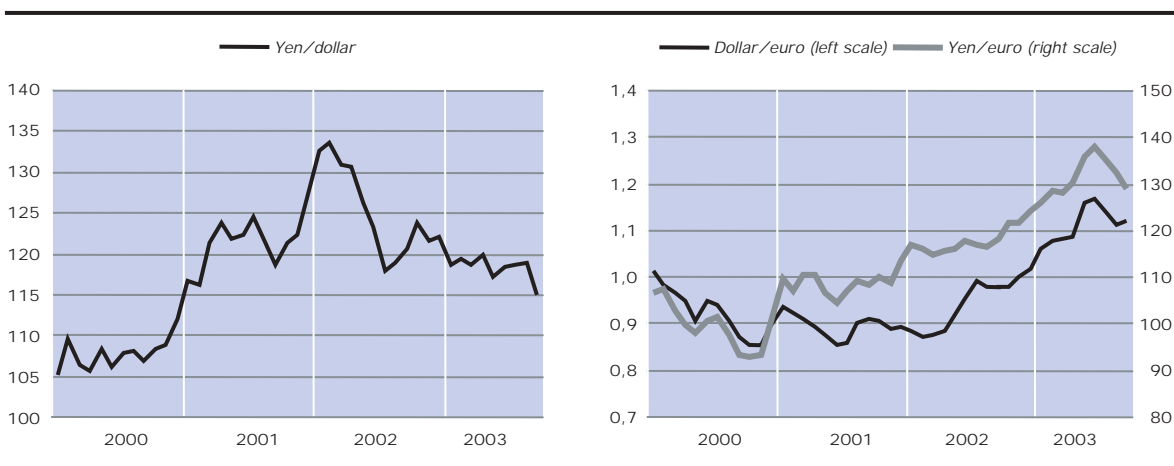
In the United States, private household spending remained the mainstay of economic

growth, supported by low interest rates. Business investment edged upward against the background of improved corporate profits, which were bolstered by favourable developments in productivity. Despite the weakening of the dollar against the major currencies (chart 1), exports remained depressed. Sluggish manufacturing activity in combination with large margins of idle capacity led to significant labour shedding, which depressed consumer confidence. The current account deficit reached an alarming level of GDP.

The risk of deflation remains a major concern of monetary policy. However, long-term interest rates (yields on 10-year treasury bonds) have risen by 1 percentage point, compared with their recent low in June, suggesting that deflationary expectations may be on the wane and pointing to a shift in expectations of a tightening of monetary policy in 2004 (chart 2).

The fiscal stimulus package of 2002 was amplified by a new package of tax cuts adopted in the spring 2003. The highly expansionary fiscal policy has led to a marked swing from a small surplus to a large public deficit in the United States. The bulk of this change in the fiscal balance is structural in nature, meaning that it will not automatically be reversed during a recovery. The medium-term fiscal outlook has thus worsened considerably and has led to calls for a strategy to redress the situation.

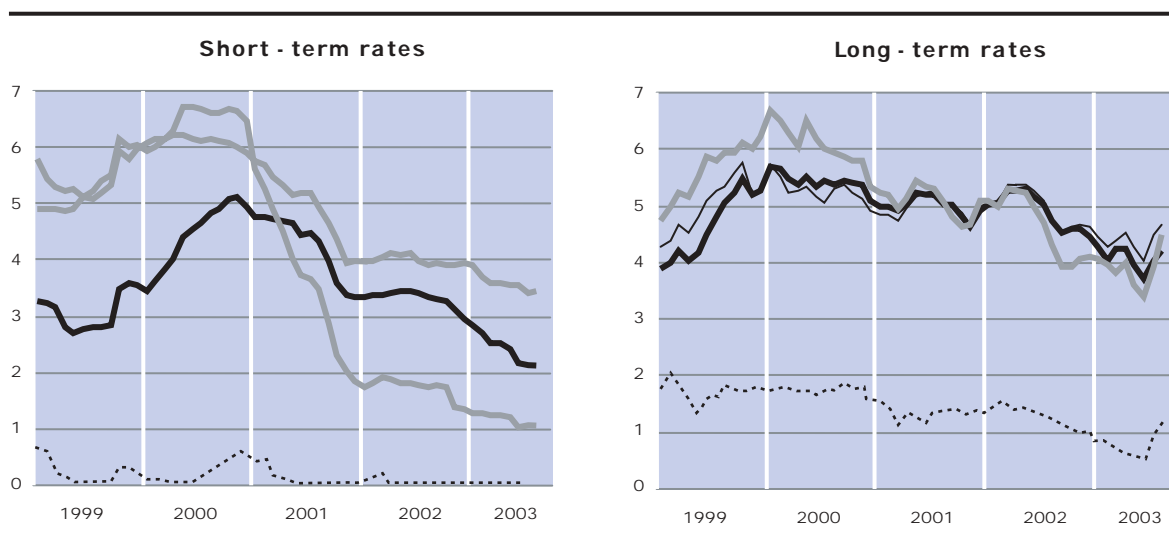
CHART 1 Bilateral exchange rates between the dollar, the euro and the yen, January 2000-September 2003



Source: Eurostat, New Cronos Database.

Note: Average monthly values.

CHART 2 Nominal short-term and long-term interest rates in selected industrialized countries, January 1999-September 2003 (Per cent per annum)



Source: OECD, Main Economic Indicators (Paris); European Central Bank [www.ecb.int]; United States Federal Reserve Board [www.federalreserve.gov].

Note: Short-term rates: three-month interbank rates; long-term rates: yields on 10-year government bonds (average monthly values).

Western Europe

Economic activity in Western Europe stagnated in the first two quarters of 2003 against the background of weak business and consumer confidence resulting from uncertainties concerning the world economic and political situation (uncertainties that prevailed despite the end of the war in Iraq), deteriorating labour markets, corporate sector difficulties, and the appreciation of the euro.

In the euro area, weak domestic demand in combination with unfavourable changes in real net exports led to a decline in real GDP by 0.1 per cent in the second quarter of 2003 following stagnation in the first.

Business confidence has edged upward somewhat since the spring 2003, but investment spending has remained lacklustre, reflecting the ongoing need for corporate balance sheet adjustments triggered by the end of the equity market bubble in 2000. Consumer confidence, moreover, has been depressed by the rise in unemployment. The average rate of unemployment rose to 8.9 per cent in July 2003, half a percentage more than in the same month of the preceding year.

In response to the deteriorating economic performance and forecasts that inflation would fall below 2 per cent in 2004, the European Central Bank lowered its main refinancing rate by half a percentage point to 2 per cent in June. But the monetary policy stimulus has been largely offset by the sizeable appreciation of the euro since the beginning of 2002.

There has been a significant deterioration of public finances in the euro area. This is largely due to the working of the automatic stabilizers in a cyclical downturn that has proved much more protracted than expected. As a result, there has been a shortfall of tax revenues, while expenditures on unemployment benefits have been higher than planned.

Eastern Europe

During the first half of the year growth gained further momentum in most East European economies and the region's aggregate GDP increased by 3.4 per cent, which was above the rates of growth in 2002 (table 2). Eastern Europe preserved its positive growth differential vis-à-vis Western Europe, a distinctive feature of European economic performance in

recent years. Domestic demand continued to be the main support of growth in the region, but stronger exports also contributed to output growth in some countries. However, consumption-led growth has been associated in some countries with large and rising fiscal and current account deficits.

Due to the intensity of their trade links with the EU, the Central European economies were relatively more affected than other East Euro-

pean countries by the protracted economic slowdown in the Western part of the continent. The economic slowdown was marked by considerable fiscal imbalances in most of these economies. The conventional cyclical deterioration of fiscal positions was only partly responsible for those large deficits: their size is to a large extent the outcome of expansionary fiscal policies. Given the magnitude of these deficits, the fiscal policies associated with them are clearly unsustainable.

TABLE 2 Changes in real GDP in Eastern Europe, 2001-2004 (Percentage change over previous year)

| | Actual | | | | Official forecast ^a | | |
|------------------------------------|--------|-----------------|-----------|-----------------|--------------------------------|---------|------|
| | 2001 | 2002 | | 2003 | | 2003 | 2004 |
| | | HI ^b | Full year | HI ^b | | | |
| Eastern Europe | 3.1 | 2.6 | 3.0 | 3.4 | 3.6 | 4.4 | |
| Albania | 6.5 | .. | 4.7 | .. | 6 | 6 | |
| Bosnia and Herzegovina | 4.5 | .. | 3.7 | .. | 3.4 | | |
| Bulgaria | 4.1 | 4.6 | 4.8 | 4.1 | 4.8 | 5.0-5.3 | |
| Croatia | 3.8 | 4.1 | 5.2 | 5.0 | 4.7 | 5 | |
| Czech Republic | 3.1 | 2.3 | 2.0 | 2.3 | 2.4 | 2.8 | |
| Estonia | 6.5 | 5.3 | 6.0 | 4.3 | 4.5 | 6* | |
| Hungary | 3.8 | 2.9 | 3.3 | 2.5 | 2.8-3.2 | 3.5 | |
| Latvia | 7.9 | 4.3 | 6.1 | 7.5 | 7 | 5-6 | |
| Lithuania | 6.5 | 6.2 | 6.8 | 7.9 | 6.8 | 6.2 | |
| Poland | 1.0 | 0.8 | 1.4 | 3.0 | 3.0-3.5 | 5 | |
| Romania | 5.7 | 4.6 | 4.9 | 4.3 | 4.5-5.0 | 4.5* | |
| Serbia and Montenegro ^c | 5.5 | .. | 3.8 | .. | 0-1 | 4 | |
| Slovakia | 3.3 | 3.9 | 4.4 | 3.9 | 4 | 4 | |
| Slovenia | 2.9 | 2.9 | 2.9 | 2.2 | 2.6 | 3.7 | |
| The former Yugoslav | | | | | | | |
| Republic of Macedonia | -4.5 | -1.4 | 0.7 | 2.6 | 2-3 | 3-3.5* | |
| <i>Memorandum items:</i> | | | | | | | |
| Baltic States | 6.9 | 5.4 | 6.4 | 7.0 | 6.3 | 5.9 | |
| Central Europe | 2.1 | 1.8 | 2.2 | 2.8 | 3.1 | 4.2 | |
| South-East Europe | 4.8 | 4.2 | 4.6 | 4.0 | 4.2 | 4.6 | |

Source: National statistics and direct communications from national statistical offices to UNECE secretariat.

Note: Forecasts are those of national conjunctural institutes or government forecasts associated with the central budget formulation. Aggregates are UNECE secretariat calculations, using PPPs based on the 1996 European Comparison Programme benchmarks. Aggregates shown are: Eastern Europe (the 15 countries below that line). Sub-aggregates are: Baltic States (BS-3): Estonia, Latvia, Lithuania; Central Europe (CE-5): Czech Republic, Hungary, Poland, Slovakia, Slovenia; South-East Europe (SEE-7): Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Romania, Serbia and Montenegro and the former Yugoslav Republic of Macedonia. Where forecasts are given in a range, the mid-point is taken for computing the aggregates.

^a As of October 2003. ^b Over the same period of the previous year. ^c Data exclude Kosovo and Metohia.

The problem that policy makers in Central Europe are now facing is that in view of their approaching accession to the EU, they will need to make a major fiscal adjustment in order to comply with the EU's fiscal policy framework, and this will have to be done in the not too distant future. From this perspective, the large fiscal deficits are now becoming a drag on their economic activity, as the necessary adjustment will have a negative effect on domestic demand and hence on economic growth.

By contrast, with an average year-on-year rate of GDP growth of 7 per cent in the first half of 2003, the Baltic region remained the fastest growing part of Eastern Europe for the fourth consecutive year. GDP growth remained relatively strong also in the majority of Southeast European economies despite the weak external environment and the adverse effects of the droughts. The continuing recovery in Bulgaria, Croatia and Romania was mainly supported by buoyant domestic demand. But other parts of Southeast Europe fared worse in this period as the effects of poor harvests were compounded with other difficulties.

CIS

After a slowdown in 2002, there was a renewed surge in economic activity throughout the CIS in the first half of 2003 with aggregate GDP growing by 7.4 per cent year-on-year (table 3). There was strong growth in all subregions, and in most CIS economies the pace of expansion picked up. The simultaneous upturn in much of the CIS and, especially, in its largest economies, the Russian Federation, Ukraine and Kazakhstan, benefited the region as a whole as – thanks to the strengthening of intra-CIS trade – growth in neighbouring economies was mutually reinforcing. Recent developments in world energy and commodity prices favoured the commodity-exporting CIS countries.

In recent years, the Russian Federation's economy has been one of the important engines of growth for the CIS region as a whole. Growth was predominantly driven by the continuing expansion of domestic demand (both private consumption and fixed investment increased sharply), but fuel exporters also benefited from increases in world market prices. The Russian economy is now in a much better shape than it was several years ago: financial markets are not the target of

speculative capital flows; the banking system has been strengthened; and monetary circulation is back to normal (payments arrears have fallen substantially). Equally important, the authorities accelerated the pace of systemic and structural reforms after the 1998 crisis and this has helped to revitalize the economy.

The short-term outlook

Global uncertainties have been reduced somewhat by the rapid ending of the Iraq war, but the outlook is still surrounded by significant downside risks. Global economic activity continues to be restrained by the ongoing adjustment in the private sector to the collapse of international equity markets in the first half of 2000; by the consequences of previous over-investment, which has led to significant margins of excess capacity, notably in the high-tech sector; and by the accumulation of high levels of debt in the corporate and household sectors. Progress in adjusting corporate balance sheets has been uneven, with Western Europe lagging behind the United States. Household debt remains at high levels, especially in the United States. A noteworthy feature is the contrast in business surveys between optimistic expectations (for the next six months or so) and the more downbeat assessment of the current economic situation.

The improved global economic outlook is dependent on the United States maintaining its role as the engine of growth for the world economy. The downside risks for the short-term outlook are therefore related to factors that could lead to a faltering of the United States recovery. In this context, a major concern remains the huge current account deficit and the associated risk of disruptive adjustments of capital flows and exchange rates of the major currencies. Another important uncertainty is the future strength of household spending in the United States against the current background of soft labour markets and record levels of debt.

For the euro area, the major downside risk is a further significant appreciation of the euro. While the depreciation of the dollar is part and parcel of the necessary external adjustment required of the United States, the question is to what extent the burden will be shared more equally between the European and Asian economies. On the other hand, persistent weakness of domestic demand in the euro zone and Japan also puts disproportionate

emphasis on the dollar exchange rate as a means of adjustment.

More recently, there has been renewed upward pressure on the oil price, which, if not reversed, would risk pushing up inflation and dampening economic growth.

There are also serious downside risks to the relatively optimistic East European forecasts. The most serious risk for East European growth in the short run would be another delay

to recovery in Western Europe. In addition, if the efforts to consolidate public finances in Central Europe fail to arrest the current fiscal expansion, this may trigger a tightening of monetary policy (driven by the policy effort to meet the Maastricht targets), with negative consequences on economic activity. In the longer term, growth in the region will be decisively influenced by the progress achieved in key structural reforms, particularly of the financial, labour and product markets.

TABLE 3 Changes in real GDP in the CIS, 2001-2004 (Percentage change over previous year)

| | Actual | | | | Official forecast ^a | |
|---------------------------------------|--------|------------------------|-----------|------------------------|--------------------------------|---------|
| | 2001 | 2002 | | 2003 | | |
| | | Jan.-June ^b | Full year | Jan.-June ^b | 2003 | 2004 |
| CIS | 6.1 | 4.4 | 4.9 | 7.4 | 6.3 | 5.2 |
| Armenia | 9.6 | 9.6 | 12.9 | 14.8 | 11* | 7* |
| Azerbaijan | 9.9 | 8.4 | 10.6 | 10.1 | 10* | 9 |
| Belarus | 4.7 | 4.7 | 4.7 | 5.1 | 6* | 6-7 |
| Georgia | 4.7 | 2.7 | 5.6 | 8.6 | 8* | 4.5 |
| Kazakhstan | 13.6 | 9.1 | 9.5 | 12.3 | 9 | 7 |
| Kyrgyzstan | 5.3 | -4.8 | -0.5 | 2.3 | 6 | 4.1 |
| Republic of Moldova ^c | 6.1 | 6.4 | 7.2 | 6.5 | 5 | 6 |
| Russian Federation | 5.0 | 3.6 | 4.3 | 7.0 | 6 | 3.8-5.2 |
| Tajikistan | 10.2 | 8.3 | 9.1 | 8.6 | 7.4 | 6* |
| Turkmenistan ^d | 20.5 | .. | 21.2 | 21.5 | 16 | .. |
| Ukraine | 9.2 | 6.1 | 4.8 | 8.6 | 6.5 | 4.8 |
| Uzbekistan | 4.5 | 4.2 | 4.2 | 3.8 | 5 | 6 |
| <i>Memorandum items:</i> | | | | | | |
| CIS without Russian Federation | 8.4 | 6.2 | 6.2 | 8.1 | 7.0 | 5.9 |
| Caucasian CIS countries | 8.1 | 6.9 | 9.5 | 10.7 | 9.6 | 7.2 |
| Central Asian CIS countries | 9.4 | 6.8 | 7.3 | 8.3 | 7.2 | 6.4 |
| Three European CIS countries | 7.8 | 5.7 | 4.8 | 7.5 | 6.3 | 5.3 |

Source: National statistics; CIS Statistical Committee; direct communications from national statistical offices to UNECE secretariat.

Note: Forecasts are those of national conjunctural institutes or government forecasts associated with the central budget formulation. Aggregates are UNECE secretariat calculations, using PPPs based on the 1996 European Comparison Programme benchmarks. Aggregates shown are: CIS (the 12 member countries of the Commonwealth of Independent States). Sub-aggregates are: Caucasian CIS countries (CCIS-3): Armenia, Azerbaijan, Georgia; Central Asian CIS countries (CACIS-5): Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan; three European CIS countries (ECIS-3): Belarus, Republic of Moldova, Ukraine. Where forecasts are given in a range, the mid-point is taken for computing the aggregates.

^a As of October 2003.

^b Over the same period of the previous year.

^c Excluding Transnistria.

^d Figures for Turkmenistan should be treated with caution. In particular, the deflation procedures that are used to compute officially reported growth rates are not well documented and the reliability of these figures is questionable.

Part 2:

Major Achievements in 2003 & Major Challenges for 2004

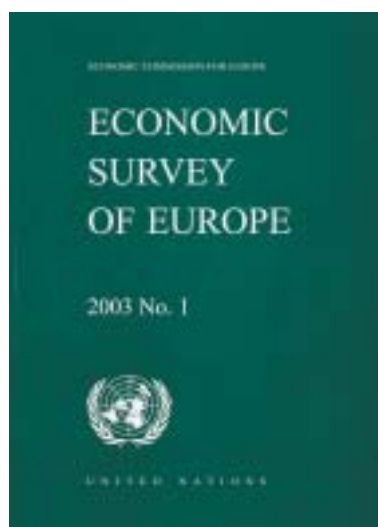
Economic Analysis

Major achievements in 2003

1. The Economic Analysis Division aims to provide information and analysis that are helpful to a broad cross-section of policy makers and economists in government, research institutes and universities, as well as to the private business sector and the public at large. The general objective is to improve knowledge, stimulate the exchange of views and sharing of experience leading to greater mutual understanding and a reduction of conflicts between national policies.
2. The two issues of the *Economic Survey of Europe* produced in 2003 provided a review of current macroeconomic developments and an assessment of the short-run outlook in the UNECE region with special emphasis on Eastern Europe and CIS. The first issue of March 2003 also contained special studies on a number of current issues. The recent financial scandals at major United States corporations have highlighted the costs of corporate governance failures. Its relevance for the UNECE region was discussed in a study

on 'Corporate governance in the UNECE region'. It goes without saying that the forthcoming EU enlargement will constitute a major challenge for UNECE. This year, UNECE has decided to concentrate on the non-acceding countries, specifically CIS, in order to study the economic implications of EU enlargement for these countries and the prospects for further economic integration within the UNECE region. Pursuant to that decision, special studies were conducted on: progress in systemic reforms in CIS; the impact of EU enlargement on non-candidate countries in Eastern Europe and CIS; international trade of CIS; changes in unemployment benefit systems in Eastern Europe and CIS and gender specific labour market adjustments in Eastern Europe and the Russian Federation. The studies concluded that the CIS countries faced important challenges in terms of enforcement of legal provisions, institution building, labour market adjustments, etc. However, EU enlargement will have a net positive impact on the non-acceding UNECE countries.

3. The second issue of the *Economic Survey 2003* included the papers presented by two distinguished experts at the UNECE Spring Seminar held on 3 March 2003. As a follow-up to the August 2002 Johannesburg Summit on Sustainable Development, the topic of the Seminar was "Sustainable development in the UNECE region". The two sessions focused on: (i) the relationship between economic growth and the environment; and (ii) sectoral dimensions of sustainable development: energy and transport. Two major conclusions emerged from the sessions. First, democratic societies achieve better environmental outcomes than dictatorial regimes. Second, sustainable development in energy can be achieved more efficiently by targeted





taxes on harmful pollutants associated with energy uses than by continued increases of the relative price of energy.

4. In early October 2003, the Division organized an informal seminar on "Policies for achieving the Millennium Development Goals in the UNECE region: Reducing extreme income disparities". The seminar was designed to constitute part of the UNECE contribution to the follow-up to the Millennium Summit and addressed some of the topical issues related to poverty reduction in the UNECE region, with main emphasis on Eastern Europe and CIS. The seminar benefited from the participation of experts from governments, research institutions and international organizations. Though poverty in the UNECE region in recent years has decreased on average, the seminar concluded that it was still a challenge to the European social model and its modernization. Stimulating pro-poor growth and reducing income inequality will require strengthening systems of public administration and financial management, increasing transparency and political accountability and renewed emphasis on institution building and good governance.
5. Most of the Division's work on ageing, carried out by the Population Activities Unit (PAU), focused on establishing the modalities for the follow-up to the UNECE Ministerial Conference on Ageing (Berlin, September 2002). The centrepiece of the follow-up work will be a collaborative arrangement between UNECE and the European Centre for Social Welfare Policy and Research in Vienna with funding from the Austrian Government. Separately, the United States National Institute on Ageing approved new funding for UNECE work in the field of ageing, and specifically for the work related to the PAU census microdata samples project over the period 2003-2007.
6. The work on the Generations and Gender Programme continued with the

second Informal Working Group meeting in Prague in February 2003, which endorsed the work programme proposed by the Consortium Board. PAU was requested by the participating countries in transition to assist in the resource mobilization for their programmes.

7. At the request of the United Nations Population Fund (UNFPA), PAU initiated activities to organize a population forum in early 2004. The Forum will be hosted by the Government of Switzerland in Geneva in January 2004, with active support from other regional institutions. Four themes, reflecting the relevant population concerns of policy makers, the scientific community, and the public at large in the region, will be discussed: global population and development trends; child-bearing and parenting in low-fertility countries; morbidity, mortality and reproductive health in countries in transition; and international migration.

Major challenges for 2004

1. With the upcoming EU enlargement, the new EU members will turn a page in their transformation while, on the other hand, the new geopolitical realities in Europe will pose new challenges for the economies both within and outside the enlarged EU. This will also present a new opportunity



for UNECE and prompts consideration of a broad range of issues, in particular: the challenges and implications for non-acceding countries, and the prospects for further economic cooperation and integration within the UNECE region. In the context of this new phase of economic and political change, a major challenge remains to ensure that the *Economic Survey* makes relevant contributions to the discussion of economic issues important to UNECE member States. Against this background, the first issue of the *Economic Survey 2004* will inter alia discuss the process of fiscal transition in EU acceding countries, with a focus on tax reforms and the implications of the EU fiscal policy framework. These issues are linked to the ambition of the acceding countries to join the euro zone. There will also be a special chapter dealing with poverty in the transition economies.

2. One of the major challenges facing the member States in the UNECE region is in finding ways to foster the competitiveness and growth of their economies as well as meeting the new challenges posed by the advance of the knowledge driven economy. Supportive public policy and efficient public institutions are important factors in shaping the competitiveness of nations and in accelerating economic development and growth. With an aim to identify some of the main tasks and responsibilities of the UNECE governments, the UNECE Spring Seminar 2004 will deal with the topic "The competitiveness of nations and economic growth in the UNECE Region". Major issues to be discussed are factors promoting economic catch-up processes, the determinants of competitiveness in the knowledge-based economy, and the role of governments in fostering competitiveness and growth in the private sector.
3. A major component in the future work on the follow-up to the UNECE Ministerial Conference on Ageing will be the organization of a workshop on indicators for sustainable ageing. The workshop will be organized together with the European Centre for Social Welfare Policy and Research and will be hosted by the Spanish Government. The work on the

census microdata samples will be continued in collaboration with the Minnesota Population Center and other partner institutions.

4. In the framework of the Generations and Gender Programme, the third meeting of the Informal Working Group will take place in the spring of 2004 to review progress, especially the methodological instruments and proposals for resource mobilization.
5. The European Population Forum is scheduled for January 2004. It will be a joint UNECE-UNPFA event, convened as part of the observance of the 10th anniversary of the International Conference on Population and Development held in Cairo in 1994. It is expected that the Forum will review newly emerging population changes in the UNECE region, examine the challenges that they pose, such as the issue of combining motherhood and labour force participation, and identify best policy responses.

Environment

Major achievements in 2003

1. The Fifth Ministerial Conference "Environment for Europe" in Kiev from 21 to 23 May 2003, was prepared and conducted with success, with the UNECE functioning as the coordinating secretariat for the process. The Ministers in Kiev adopted three new protocols to UNECE conventions: the Protocol on Strategic Environmental Assessment requires its Parties to evaluate the environmental and health consequences of their draft plans and programmes; the Protocol on Pollutant



Release and Transfer Registers strives to enhance public access to information through nationwide inventories of pollution from industrial sites and other sources; and the Protocol on Civil Liability will give individuals affected by the transboundary impact of industrial accidents on international watercourses a legal claim for adequate and prompt compensation. The Kiev Conference adopted, in addition, Guidelines for Strengthening Compliance with and Implementation of Multilateral Environmental Agreements in the UNECE region and a regional Convention on the Carpathians. The Environment Strategy for Countries of Eastern Europe, the Caucasus and Central Asia (EECCA) as well as the preparation of the "Environment, water and security partnership in Central Asia", launched at the Kiev Conference, contribute, for their part, to further defining the key environmental priorities in this sub-region, and call for additional joint efforts at the national, regional and international level for solving them. Moreover, a number of other important decisions were taken related to energy for sustainable development, water for sustainable development, biodiversity and education. The UNECE Ad Hoc Working Group on Environmental Monitoring contributed to the European Environment Agency's Third Assessment of Europe's environment, which was adopted at the Kiev Conference. The continuation of the process through regular ministerial conferences was strongly supported by the participants.

2. An active environmental input was provided for the Commission's session in March 2003, as well as for that of the Commission on Sustainable Development in April 2003 with regard to the regional follow-up to the World Summit on Sustainable Development. The discussion focused on the experiences of national strategies and regional added value of work on sustainable development.
3. The Committee on Environmental Policy adopted the environmental performance review (EPR) of Georgia at its special session in February 2003. The peer review of Azerbaijan was conducted and submitted for adoption by the Committee at its tenth session in October 2003. A ten-

year review of the EPR process, including recommendations for the future of the review process, was prepared for adoption at the Kiev Conference. The first round of reviews in the countries in transition of the region has almost been completed and is being followed up by a second round of reviews with a focus on implementation of national policy targets and legislation as well as of international commitments such as conventions and regional strategies.

4. The Committee prepared "Future UNECE strategic directions for the environment" in close consultation with the UNECE environmental convention bodies for adoption in October 2003. The Strategy assesses the UNECE environmental achievements and challenges so far, the changing political and economic landscape and its implications for the UNECE environmental work as well as its environmental contribution to sustainable development.
5. The first session of the Steering Committee for Transport, Health and Environment Pan-European Programme (THE PEP) was organized jointly with the World Health Organization's Regional Office for Europe and the UNECE Transport Division in April 2003. Based on the proposal of the secretariat, THE PEP Steering Committee endorsed its programme of work containing four main activities to be implemented during 2003 to 2005: (i) establishment of an Internet-based clearing house on transport, environment and health for disseminating information and best practice and for building capacity, (ii) promotion of good practice in sustainable and healthy urban transport and planning through the organization of a workshop and through the Internet, (iii) promotion of progress in the valuation of costs of transport-related health effects, in particular on children, (iv) further development of indicators on integration of environmental and health aspects into transport policies.

Major challenges for 2004

1. As mandated by the World Summit on Sustainable Development, more efforts will be made to promote regional imple-

- mentation of the Johannesburg Plan of Implementation, notably by providing input to the UNECE regional meeting to be held in January 2004, which will focus on human settlements, water and sanitation.
2. In line with the request of the Ministers in Kiev, the Committee on Environmental Policy in consultation with the other principal subsidiary bodies (PSBs) and in cooperation with other relevant organizations will monitor the outcome of the Kiev Declaration and reflect the relevant commitments of the Declaration in its work programme. As part of the Kiev follow-up, work will be carried out in particular to promote the implementation of the EECCA Strategy, to develop a communication strategy to raise awareness of the "Environment for Europe" process, and to finalize a strategy for education for sustainable development.
 3. The environmental review programme will be continued on the basis of the recommendations adopted by the Committee and endorsed at the Kiev Conference. Significant policy issues in the reviewed countries will be identified for discussion within the Committee. Peer reviews will be carried out in Bosnia and Herzegovina, and in Tajikistan.
 4. Activities within the Transport, Health and Environment Pan-European Programme shall be further implemented in coordination with the other sectors. THE PEP Steering Committee will be convened in Spring 2004 to review progress.
 5. The implementation of and compliance with existing legal instruments on the environment will be further stressed, for instance by making use of the Guidelines adopted at the Kiev Conference. Informal discussions between the Bureaux of the Committee and the governing bodies of the conventions will be pursued with a view to sharing experiences and ideas on concrete issues that are common to the conventions.

Human Settlements

Major achievements in 2003

1. The Committee on Human Settlements at its annual session in September 2003 held an in-depth discussion on reforms and social equity in human settlements. The discussion showed that the rise in urban poverty was one of the most serious concerns in the region. While poverty, social exclusion and inequality are much more pronounced in the countries in transition, they are also an integral



part of the social landscape of large metropolitan areas in Western Europe and North America. The high rate of poverty and inequality in urban areas leads to the exclusion of certain population groups from adequate health care, education and housing. Cumulative disadvantages, often defined along the lines of gender, age and ethnicity, create widening social disparities between different social groups with low-income, single-parent or women-led households being worst off. It was decided that the Committee would contribute to raising awareness on the need to integrate human settlements reforms with policies promoting social stability and social equity by providing substantive input to the regional follow-up meeting to the World Summit on Sustainable Development in January 2004.

2. Country profiles on the housing sector for Armenia and the Russian Federation were prepared. Conceptual changes have been implemented within the country profile programme, in particular through a shift to a more problem-oriented approach. The follow-up of the implementation of past country profiles is being stressed. In this context, a round table on the follow-up of the country profile on Romania has been held. A land administration review on the Russian Federation has been carried out.

The results of the review fed into the preparation of the country profile on the Russian Federation. Three workshops have been held dealing with concerns related to land registration and land markets: one on mass valuation systems of land for taxation, one on customers-cooperation services and one on spatial information management for sustainable real estate markets. A workshop on social housing was organized in cooperation with CECODHAS, an NGO active in the area of social housing. The workshop aimed at identifying aspects of particular concern on which member countries would like to concentrate future work, in particular guidelines on social housing. Preparations of the guidelines on housing finance have been largely finalized. The work on the implementation of the Guidelines on Condominiums is ongoing. In this context, a workshop to discuss their implementation in Eastern Europe will be held in Moscow.

Major challenges for 2004

1. The work during this period will concentrate on the country profile programme as well as the land administration reviews. A number of countries have expressed an interest in having a country profile carried out. In addition, it is foreseen that a regional housing profile for South-East Europe will be prepared in cooperation with other international organizations





active in the region. A land administration review will be carried out for Lithuania. The UNECE Land Administration Guidelines will be updated in order to reflect the new challenges that the countries in transition are facing after having implemented a considerable number of transition policies, such as land transfer to the local level and privatization. A task force will be set up for the preparation of guidelines on local planning. Two workshops on land administration will be held: one in Lithuania on information technology in land administration and the other in Armenia. Preparations of the guidelines on social housing will continue to give particular emphasis to the governance and financing of social housing. A second workshop on social housing will be held at the end of the year to present the contents of the guidelines. ISOCARP, an international NGO of urban planners, and the Committee will jointly organize the in-depth discussion for the next Committee's session.

2. The resource constraints in the secretariat are felt in particular in implementing the programme on in-depth country reviews of human settlements and land administration, which require much preparatory, coordination and finalization work by the secretariat. These programmes are, however, much appreciated by countries in transition. Consequently, there is often a long delay between the request by a specific country for a review and the time that the secretariat can prepare one. Also, the follow-up

to reviews is limited by resource constraints.

Industrial Restructuring and Enterprise Development

Major achievements in 2003

1. UNECE organized the first Land for Development Forum to promote a better understanding of the role of property rights as a tool for economic growth and identify the ways that property rights could be made available to the poor. As result of that event, the Government of the United Kingdom agreed to support the Forum's programmes to establish special arbitration courts for poor rural workers to protect their rights. In addition, new property legislation was enacted in CIS to give new rights to poor people.
2. UNECE produced the Report on Small and Medium-sized Enterprises (SMEs) in Countries in Transition in 2000-2001. This pioneering document presents the recent statistics on SMEs, as well as legislation and support measures for SMEs in countries in transition. The Report attests to the need to improve the framework regulatory conditions for entrepreneurship and SMEs in several countries of the region.
3. UNECE organized the Second Forum of Women Entrepreneurs, gathering over 250 women entrepreneurs from 28 countries (March).

The discussion at the Forum focused on initiatives and best practices of governments, private sector and other stakeholders aimed at improving access of women entrepreneurs to financing and new technologies. It was decided that, in addition to organizing the biennial Forums of Women Entrepreneurs, UNECE would support the organization of subregional events, explore possibilities for organizing training sessions in cooperation with subregional groupings, such as Central European Initiative, Black Sea Economic Cooperation and Special Programme for the Economies of Central Asia, and strengthen cooperation with regional commissions, especially with the Economic and Social Commission for Asia and the Pacific (ESCAP).

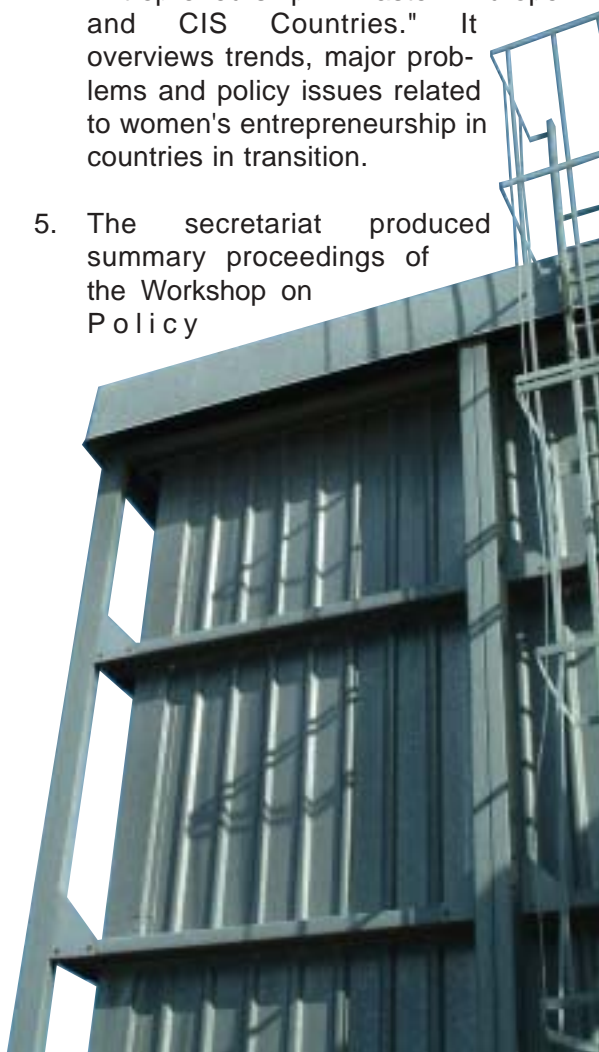
4. The secretariat released the first publication in the series on women entrepreneurship entitled "Women's Entrepreneurship in Eastern Europe and CIS Countries." It overviews trends, major problems and policy issues related to women's entrepreneurship in countries in transition.
5. The secretariat produced summary proceedings of the Workshop on Policy

and Regulatory Options for Promoting Industrial Restructuring in the UNECE Region and the Conference on Innovation as a Vehicle for Industrial Restructuring, organized under the auspices of the Team of Specialists on Industrial Restructuring in April. This document, intended for government decision makers, summarizes the major ideas and proposals put forward by the participants.

6. UNECE promotion of the economic dimension of security in Europe has borne fruit with the decision taken at the OSCE 10th Ministerial Council in Porto, on 6-7 December 2002, to renew its commitment to the economic dimension. In 2003, the secretariat prepared a report to the OSCE Economic Forum in Prague (May) on the performance of OSCE participating States in implementing their commitments to good governance.

Major challenges for 2004

1. The main challenge in the enterprise development and restructuring programme will be to contribute practically to the establishment of the rule of law, in particular the enforcement of property rights and contract discipline, in countries in transition. The improved transparency and accountability of both large and small enterprises will facilitate the financing of new start-up companies as well as the modernization of existing enterprises.
2. UNECE will continue to strengthen its cooperation with OSCE in establishing an effective conflict prevention capacity. UNECE is expected to be given a mandate by the OSCE New Strategy Document to develop proposals for the establishment of "an early warning system" in the economic and environmental dimensions.
3. In the area of entrepreneurship promotion, UNECE will focus its work on good governance for SMEs. As a first step, in 2004 it will organize an expert meeting on good governance for small and medium-sized enterprises. The final objective of



this new direction is the development of guidelines on business ethics for start-up entrepreneurs.

4. UNECE will finalize its new recommendations regarding the establishment of integral management systems for industrial and services enterprises, including SMEs.
5. Poor governance and organized crime in some parts of UNECE region are a major barrier to establishing public-private partnerships (PPPs). The main challenge for the UNECE PPP Alliance will be to agree on guidelines which could improve transparency and investor confidence in PPPs, and develop ways to implement them.
6. One of the major challenges for the UNECE Real Estate Advisory Group will be to find effective practical ways to implement the Land for Development Programme in particular, to translate proposals for formalizing property rights into effective policies. To this end, of utmost importance will be the development of a tool kit for governments which will help identify policies conducive to the practical use of property rights for development.
7. In the context of gender mainstreaming, challenges will be the organization of a subregional UNECE Forum of Women Entrepreneurs in Turkey, a Regional Symposium on Gender Mainstreaming in Economic Policies, and the preparation for publication of the second volume in the series on women's entrepreneurship "Women Entrepreneurs in the ECE Region: Access to Financing and ICT."



Statistics

Major achievements in 2003

1. In 2003, the 51st plenary session of the Conference of European Statisticians was organized according to a new structure. The Conference was attended by over 130 delegates representing 50 national offices and by almost 20 international organizations, United Nations departments and specialized agencies. The Governor of the Bank of Canada delivered a keynote speech via video link. Major outcomes of the Conference include the launching of the following projects: measuring globalization (the Multinational Enterprises project); statistical confidentiality (develop principles for the dissemination of microdata); research on family and household statistics; development of a new set of recommendations for the 2010 round of population and housing censuses in the UNECE region.
2. The Conference decided that an annual UNECE statistical programme was to be compiled, starting with the year 2004, with the inclusion of statistical activities of other UNECE divisions.
3. The ILO/UNECE/IMF/World Bank/ OECD/ Eurostat International Manual on Consumer Price Indices was finalized. The Manual is ready for adoption and release.
4. As a side event to the World Summit on the Information Society, the Statistical Division prepared, together with the United Nations Conference on Trade and Development, the International Telecommunication Union, UNESCO Institute for Statistics, the Organisation for Economic Co-operation and Development and EUROSTAT, the Workshop on Monitoring the Information Society. It is envisaged that the Workshop will make concrete recommendations about ICT statistics and indicators to the United Nations Statistical Commission for endorsement as an international standard.
5. The capacity to monitor progress towards the Millennium Development Goals and sustainable development through relevant



and internationally comparable indicators that are part of official statistics has been created within the Statistical Division. In cooperation with the United Nations Development Programme (UNDP), workshops on standard indicators for human development and Millennium Development Goals reporting have been organized for analysts from UNDP South-East Europe and CIS country offices.

6. The UNECE Gender Statistics Database has been launched. It is accessible free of charge on the web site of the Statistical Division at the following address: <http://www.unece.org/stats/gender/web/database.htm>. The Database helps monitor the situation of women and men in Europe, North America, CIS and Israel.
7. The Statistical Division completed the selection and evaluation of a software tool that will provide a basis for the public dissemination of time series via the Web. An agreement was concluded with the producer of the system (Statistics Sweden). The implementation plan and calendar were agreed upon.
8. The 2003 issue of the publication "Trends in Europe and North America", aimed at a broad readership, was released as well as the 50th Anniversary Book on the History of the Conference. Furthermore, the Division provides on a regular basis selected statistics from various areas in the form of tables and charts to the new "UNECE Weekly".
3. updates without overburdening national statistical offices. The coverage of the Database will be expanded in response to emerging issues, especially on ICT and entrepreneurship.
3. The three dimensions of sustainable development and the Millennium Development Goals will be integrated into the work of the Division, both concerning conceptual specification of indicators from the official statistics point of view, and with respect to data collection and database activities so as to support work of other UNECE divisions. This work will be carried out in close coordination with other international organizations within and outside the United Nations, so as to avoid duplication.
4. In view of the need expressed at the 51st Conference of European Statisticians to advance the adoption of the recommendation for the 2010 round of population censuses in the UNECE region to 2006, work has to be accelerated. 2004 will concentrate on ascertaining which parts of the 2000 recommendations need revising, and how they should be revised. One area that has already been identified is families and households.
5. The 51st Conference decided to launch under its auspices an experimental project on measuring the activities of multinational enterprises through a coordinated effort of countries and international organizations that volunteer to take part. The year 2004 will have to start with implementation, based on terms of reference and an organizational structure decided by the Bureau.

Major challenges for 2004

1. Using the new platform for dissemination on the Web, key macro-economic reference series for UNECE countries from the Division's macro-economic database will be made publicly available and regularly updated. The focus will be on coherent time series for CIS, East and Central European countries.
2. An update and completion strategy for the Gender Statistics Database will be implemented, aiming at obtaining regular
6. The Integrated Presentation of International Statistical Work in the UNECE Region, the key tool for and a major output of the coordinating function of the Conference, is now available as a publicly accessible database in a pilot version. The updating methods and periodicity have to be reconsidered and suitable technical means developed and implemented to allow all partner organizations

to update their information directly. As a consequence, it will be possible to reduce the need for paper versions.

Sustainable Energy

Major achievements in 2003

1. The Committee on Sustainable Energy's guidelines for reforming energy prices to meet sustainable energy development objectives were adopted at the "Environment for Europe" Ministerial Conference in Kiev. The Committee also evaluated energy security risks through the UNECE Energy Security Forum with the participation of the Secretary-General of OPEC. The Energy Security Forum provided an appraisal of energy security risks by experts from OPEC, EU, the Russian Federation and the United States to financial markets and the energy community through significant press and television coverage.
2. The Working Party on Gas, through its inter-sectoral Task Force, carried out an economic and technical assessment of the Blue Corridor project aimed at the creation of transport corridors for gas-driven vehicles. Its Ad Hoc Group of Experts on the Supply and Use of Gas completed two projects related to normative activities in the downstream gas business and launched another project on "Existing Standards for CNG Fuelling Stations."
3. In January 2003, the Working Party on Gas agreed that energy security could be enhanced by expanding energy trade and investment. This could be achieved by facilitating energy market and energy price adjustments. The Round table on a Wider Europe – New Challenges for the Energy Sector, with senior energy industry executives, held on 21 January 2003, concluded that this could best be achieved by strengthening economic and political ties through the concept of a wider Europe which would go some way to ensure a more secure and sustainable energy future for all.
4. The Gas Centre's new Task Force on the Security of Natural Gas Supplies and its other existing task forces evaluated the ramifications of the EU Gas Directive for the 15 EU countries, gas markets and gas industries as well as its implications for countries in Central and Eastern Europe. The task forces reviewed how Central and East European countries and their gas industries can best prepare themselves and benefit from the experiences acquired in Western Europe and North America.
5. The Energy Efficiency 21 Project received approval for financing US\$ 25 million of investments, while a further US\$ 30 million of investments are under consideration by international financial institutions, targeted funds and commercial banks as part of its work on energy efficiency market formation and investment project development to reduce greenhouse gas emissions in countries in transition.



6. The Task Force on the United Nations Framework Classification for Reserves and Resources created an inter-sector Ad Hoc Group for harmonizing the terminology of all energy commodities (petroleum, natural gas, coal and uranium). The World Energy Council agreed to adopt this new classification system for its 2004 Survey of Energy Reserves and Resources. This continues the United Nations Framework Classification for Solid Fuels and Mineral Commodities adopted by more than 60 countries worldwide and by selected stock exchanges.
7. The Ad Hoc Group of Experts on Coal and Thermal Power agreed to realign its work to better respond to the challenges of the global sustainable development and environmental debate. A successor Ad Hoc Group of Experts on Coal in Sustainable Development will address the economic, social and environmental dimensions of coal in the countries in transition.
8. Under Regional Advisory services, the CIS countries launched the second phase of the work on Energy Efficiency and Energy Security in CIS. Energy efficiency projects were approved with UNDP and Global Environment Facility support in Ukraine, Kazakhstan, the Russian Federation and Belarus. The implementation of the Rational and Efficient Use of Energy and Water Resources Project with significant support of the United Nations Development Account in Central Asia completed plans for prototype investment projects during 2003.
9. The Ad Hoc Group of Experts on the Extension of Europe on Electricity Interconnections agreed to reorient its programme of work and change the name of the Group to the Ad Hoc Group of Experts on Electric Power to respond more effectively to the needs of UNECE member States and sustainable development issues. The Project Group of the South-east European Cooperative Initiative (SECI), supported by the United States Agency for International Development (USAID), pursued a new project on Regional Electric Power Transmission and Expansion Planning in South-East Europe.

Major challenges for 2004

1. The Sustainable Energy sub-programme will begin to incorporate new initiatives in 2004 with greater attention to energy security, global financial markets, corporate governance, policy dialogue, renewable energy sources, zero-emission technologies and inter-sectoral activities. The work programme will place more emphasis on economic development as called for in the Millennium Declaration, such as the restructuring in coal-mining communities in countries in transition based on experience in Western countries. It will provide additional analysis and policy dialogue on key issues such as energy security, the liberalization of energy markets and the development of cleaner, more efficient energy systems to reduce greenhouse gas emissions in line with the recommendations of the World Summit on Sustainable Development.
2. The work programme will be implemented increasingly with innovative Internet applications to enhance communications and value-added information transfers within and between UNECE member States in accordance with the likely recommendations of the World Summit on the Information Society. It will build on inter-sectoral activities initiated in the previous biennium with joint projects in timber and transport, notably on wood as an energy source and the 'Blue Corridor' project use of natural gas as a transport fuel.

Technical Cooperation Unit

Major achievements in 2003

1. UNECE carried out more than 30 technical cooperation projects in environment, energy, transport, trade, statistics, entrepreneurship, the development of SMEs and property markets. Among the most prominent were: Energy Efficiency 21, Energy Efficiency Investment Project Development for Climate Change Mitigation, Trans-European Railway Project, Trans-European North-South Motorway Project, environmental impact assessment, Project on Visa Regime in SECI, and the SPECA project on the efficient use of water and energy resources.

2. UNECE also provided advisory services to a large number of transition and emerging market economies in 2003 on issues such as trade facilitation, investment promotion, energy, environment, transport, institutional environment for SMEs, youth and women's entrepreneurship, and statistics.
3. UNECE technical cooperation was concentrated on capacity-building (training, transfer/exchange of expertise), project elaboration (formulating, designing and implementing projects), institutional build-up and policy formulation.
4. The bulk of the UNECE technical cooperation concerned the exchange and transfer of expertise, mainly in the form of workshops, seminars or forums, but also in the form of technical missions or study tours. Other capacity-building activities were associated with the implementation of projects mentioned above and the build-up of institutional capacities in countries in transition to help them implement the UNECE conventions.
5. Almost half of the technical cooperation activities of the UNECE Regional Advisers implemented in 2003 fell under the mandates of the Committee for Trade, Industry and Enterprise Development. They were followed by the activities mandated by the Inland Transport Committee.



6. In 2003, about half of the UNECE advisory services related to project elaboration were implemented in energy and transport

in response to the mandates of the Committee on Sustainable Energy and the Inland Transport Committee. About half of the capacity-building activities were carried out in transport and statistics. UNECE technical cooperation in the area of institutional development concentrated on creating an environment supportive of entrepreneurship, and SME creation and development. Cooperation in policy-formulation was predominantly carried out in areas under the Committee for Trade, Industry and Enterprise Development.

7. UNECE has provided technical cooperation in statistics to around 20 countries in South-East Europe and CIS. This has taken the form of statistical capacity-building through services provided by the UNECE Regional Adviser on Statistics and through the regular meetings of the Conference of European Statisticians. Bilateral technical cooperation on statistics has concentrated on South-East Europe in 2003 (Albania, Bosnia and Herzegovina, Serbia and Montenegro, and in particular on the former Yugoslav Republic of Macedonia in the context of the internationally supervised population census required by the Ohrid Framework Agreement).
8. Multilateral cooperation on statistics has also been provided to groups of countries of South-East Europe and CIS in specific working sessions organized by the UNECE Statistical Division in cooperation with other organizations such as OECD, UNDP and the World Bank. Technical cooperation in statistics has covered a wide range of topics in 2003: general organization of the official statistical system, fundamental principles of official statistics, statistical legislation, population census, statistical indicators for human development and Millennium Development Goals reporting, national accounts and price statistics.
9. The overall geographic distribution of the UNECE Regional Advisers' activities reflected the subregional priorities of the UNECE technical cooperation. In the energy sector and environment, for example, UNECE technical cooperation focused mostly on the members of CIS,



especially Central Asia. This is not surprising, considering the strategic importance of energy and water issues in these subregions.

10. Most of the resources made available to the Commission for funding technical cooperation activities come from extra-budgetary sources and are oriented towards the implementation and promotion of international conventions and protocols. A significant proportion of the resources also come from the UN Regular Budget, UN Development Account as well as from UN partner organizations. Finally, some additional resources come from donor's voluntary contributions.

Major challenges for 2004

1. The forthcoming political and economic changes brought about by EU enlargement will intensify the need for technical assistance among non-accessing countries to capture potential benefits and offset any negative impact associated with this process. This will include assessment of short- and long-term priorities for technical cooperation activities in the UNECE region and their alignment with the new demands and evolving situation.
2. The current focus on the implementation of the outcomes of recent global conferences and summits and the expected enhanced role that the United Nations regional commissions are to play in this area will require further strengthening of cooperation and coordination of UNECE with other organizations of the United Nations system as well as with non-United Nations partners.
3. Fund-raising will be a major challenge to complement the UNECE technical cooperation budget by mobilizing external support from bilateral donors, as well as other development organizations and financial institutions, such as UNDP, the World Bank, etc.

4. A UNECE technical cooperation strategy aimed at addressing these challenges is being drawn up and will be submitted for consideration at the 2004 Annual Session of the Commission.

Timber

Major achievements in 2003

1. The secretariat, with many partners, collected, validated and presented information on the "State of Europe's Forests" for the fourth Ministerial Conference on the Protection of Forests in Europe (MCPFE), held in Vienna in April 2003. The data were based on a set of indicators of sustainable forest management, drawn up with the help of UNECE. UNECE has developed a strong partnership with MCPFE in many areas of activity.
2. The seminar on strategies for the sound use of wood, held in Romania in March 2003, pointed out that the sound use of wood supported sustainable forest management and should be encouraged by governments through wood promotion, creating effective and non-distorting building codes, and certification.
3. In its continuing work to monitor and analyse developments in the sector, the Committee paid increasing attention to policy and cross-sectoral issues. A round table on trade, environment and forests – working together for sustainable development – was held together with the Food and Agriculture Organization of the United Nations (FAO), and a policy forum on forests, wood and energy took place during the Committee's session.
4. The secretariat prepared the Annual Forest Products Market Analysis for review by the Committee in a shorter, more policy-oriented, format. The data on which it is based were collected in cooperation with three other agencies, and are being made available increasingly over

the Internet, confirming the Timber Committee's central role in monitoring the sustainable development of the sector.

5. Most of the European Forest Sector Outlook Study was completed and made available in draft form. In addition to the traditional analysis of the long-term (20-40 years) supply and demand balance for forest products, there is special emphasis on the long-term influence of policy choices, inside and outside the forest sector, on the outlook for sustainable development of the sector.
6. The programme of exchange of information on sustainable forest management continued with two seminars under the auspices of the joint FAO/ECE/ILO Committee on Forest Technology Management and Training, on forest operation improvements in farm forests, in Slovenia and on close-to-nature forestry, in Slovakia.
7. The UNECE secretariat with representatives of MCPFE and the United Nations Environment Programme (UNEP) presented European regional cooperation as a case study at the third session of the United Nations Forum on Forests. It is hoped that the regional dimension of this global forum will be developed.
8. The database on forestry assistance to countries in transition was updated and made available, and country profiles of the sector issued for Georgia and Ukraine.

Major challenges for 2004

1. The second strategic review of the ECE/FAO forests and timber programme will review priorities, methods and outputs with all interested stakeholders and prepare a revised work programme for the joint session of the UNECE Timber Committee with the FAO European Forestry Commission in October 2004.
2. The European Forest Sector Outlook Study should be completed and published: its conclusions should be presented and discussed by governments

and market actors, and the consequences for ECE/FAO be analysed.

3. A major conference on forest fire prevention and control, with a special focus on the Eastern Mediterranean, will be held in Turkey (postponed from 2003, because of the security situation at the originally scheduled date). A multinational fire-fighting exercise with ground and aerial fire fighting forces of two or more countries will be held on the same occasion.
4. Further seminars and workshops will be held on new roles and modes of operation of forest services and on environmentally sound forest roads and wood transport.
5. The situation as regards policies and institutions for the sector in countries in transition will be monitored and capacity-building activities undertaken.
6. Further efforts will be made to develop inter-sectoral and cross-sectoral activities, notably as regards trade and environment and wood energy, depending on the conclusions of the strategic review.



Trade Development

Major achievements in 2003

1. The Committee for Trade, Industry and Enterprise Development held a successful second International Forum on Trade Facilitation with over 500 participants, in cooperation with 12 other international organizations. The Forum's

theme was "How can trade facilitation be enhanced in a new security environment?" and it was concluded that the solution may lie in a collaborative approach among international organizations in defining security standards. The role of trade facilitation in the World Trade Organization's (WTO) Doha Development Round was also discussed and the Forum emphasized the urgent need for technical assistance and capacity-building for countries in transition and developing countries, in order to spread more fairly the benefits of trade facilitation.

2. Following up to the International Forum, a meeting was organized jointly with the World Customs Organization on trade facilitation and security. This meeting examined the division of responsibilities among international organizations involved in this area.
3. As part of a wider UNECE project looking at the challenges, opportunities and consequences arising from EU enlargement for non-acceding countries, and especially the Western Balkan countries and CIS, the Committee organized several events to look at the principal trade, business and investment issues. These included a workshop on trade, business and investment in a wider Europe and one on EU enlargement: regulatory convergence with non-acceding countries. During both workshops a major focus was on technical harmonization and standardization and the potential contribution of UNECE. As a result, it was concluded that further economic cooperation and integration between the enlarged EU and non-acceding Euro-Asian countries was necessary to reduce disparities within the region and develop a zone of prosperity and stability. Strategies for accomplishing this goal need to include greater regulatory convergence and harmonization, reduced trade transaction costs, increased stimuli for SMEs, and better targeted training and capacity-building programmes in the EU new neighbouring countries.
4. Based on the first workshop, a publication was also produced: "Beyond Enlarge-

ment: Trade Business and Investment in a Changing Europe." It presents to policy makers some of the opportunities for further economic integration within the region after EU enlargement and raises some issues that need to be addressed to ensure that Europe develops in a positive manner, promoting sustainable prosperity throughout the continent.

5. The Committee, in cooperation with the Agency for International Trade Information and Cooperation, held a briefing for the Missions of UNECE member States and country representatives on issues of current concern regarding the multilateral trade negotiations, in order to help with the preparations for the WTO Ministerial Meeting in Cancún, Mexico. A briefing was also organized immediately after the WTO Ministerial Meeting to discuss the results.
6. The Working Party on Technical Harmonization and Standardization Policies (WP.6) organized two international seminars: one on regional experiences in good governance for regulatory practices in Bratislava, with particular emphasis placed on the situation in the Balkan region, and a second, larger seminar on good regulatory practices in Geneva. The objective of these seminars was to help governments ensure that safety and other legitimate regulatory requirements decided on a national level do not create unnecessary obstacles to trade.
7. As a result of previous work with the countries of the CIS subregion on the practical implementation of UNECE Recommendation "L" (International Model for Technical Harmonization), the CIS members decided to use its principles and mechanisms in the CIS agree-



ment on the harmonization of technical regulations which was prepared by the CIS standardization bodies at their meeting in Armenia in May 2003.

8. The Trade Promotion Directory with the essential contacts for trade in all member States was published on the Internet. Participants in the Multiplier Point Network of national centres for promoting the Committee's work were constantly updated on trade, industry and enterprise development activities.
9. UN/CEFACT adopted a technical standard for electronic business extensible mark-up language (ebXML), which will be the basis for work on a new United Nations recommendation on electronic business. The technical specifications for technology-neutral electronic business core components were launched as basic building blocks for work in this area. Recommendations 23 and 28 were revised, and two updates were issued of both UN/LOCODE (code for trade and transport locations) and UN/EDIFACT (Electronic Data Interchange for Administration, Commerce and Transport). More information can be found at www.unece.org/cefact/
10. The United Nations Electronic Trade Documents project (UNeDocs) is an implementation activity to assist countries with the development of aligned trade document systems in paper and electronic formats that can be used by SMEs. During 2003, UNeDocs developed a digital trade document as proof of concept (see the UNeDocs web site: www.UNeDocs.org) and began work on a feasibility study for implementation.
11. The Working Party on Agricultural Quality Standards continued its work on updating and creating internationally harmonized quality standards (approximately 20 standards were revised and two new standards adopted). Work on internationally harmonized trade descriptions for fruit and vegetables to be used in electronic commerce as well as internal quality and maturity requirements was continued. Two training courses and two expert meetings on meat were organized in the Russian Federation in cooperation with the Ministry for Science, Industry and Technology of the Russian Federation and the St. Petersburg Customs Academy. The Working Party also supported other capacity-building activities for SMEs in cooperation with EAN International, the Black Sea Economic Cooperation and the Government of Israel.
12. The Capacity Building Project for Sustainable Development of the Russian Timber Sector strengthened its work on the sustainable use of woody biomass for energy production and expanded its activities in the UNECE region. The focus on distance-learning programmes allowed for a wider sharing of the project's results with an increasing number of regions and countries. The project also strengthened its cross-sectoral and interregional approach in trade and environment and, in particular, in biomass trade.
13. An inter-regional seminar and two workshops were organized by UNECE as the lead organization in the inter-regional e-Mediterranean (e-Med) project funded by the United Nations Development Account (see www.unemed.org). One of the conclusions coming out of this project was the need to work toward the establishment of



an interregional MEDPRO committee to promote trade facilitation and e-business implementation in the region and especially in countries that are not applying for EU membership.

Major challenges for 2004

1. The Committee will host the International Forum on Challenges for Trade and Enterprise Development in a Changing Europe in May 2004 in Geneva. The purpose of this Forum will be to enable the non-acceding countries to better understand the benefits and new opportunities arising from the changing trading environment in Europe. The expected outcome of the Forum will be a cluster of recommendations on areas of action where UNECE and other international organizations could assist non-acceding countries to integrate more effectively into the regional and global system of trade.
2. A joint UNECE/OSCE workshop will be organized on "The Economic Dimension of Security in Europe: Facing New Challenges in a Changing Environment". The workshop will explore how integration in the region will affect the future shape and direction of the economic dimension of security in the next decade and assess how cooperation in the region could be strengthened in order to enhance security and conflict prevention, which are the prerequisites for a stable and prosperous Europe.
3. A new UN/CEFACT recommendation on electronic business will be developed, a number of existing UN/CEFACT recommendations will be updated and, simultaneously, more focus will be placed on the implementation of Trade Facilitation Recommendations, particularly in countries in transition.
4. In cooperation with SITPRO, the Simpler Trade Procedures Board of the United Kingdom, a set of ten international trade documents in paper and electronic format will be drafted for implementation under the UNEDocs project. A feasibility study for UNEDocs implementation in Serbia and Montenegro will also be completed.
5. Additional resources need to be obtained to support expanded and new work under UN/CEFACT in support of electronic business standards, given that current UNECE secretariat resources are not sufficient. Following the obtaining of these resources, additional commercial repositories and registries for electronic business standards will need to be initiated. A solution also needs to be found to the issue of intellectual property rights in UN/CEFACT work.
6. Practical results should be achieved from the technical projects of the Working Party on Technical Harmonization and Standardization Policies (WP.6), namely the harmonization of technical regulations in the telecommunications and earth-moving machinery sectors. Also, significant progress should be made in the definition of best practices by the WP.6 Ad Hoc Advisory Group of Experts on Market Surveillance, established in 2003 in order to follow up on the 2002 Market Surveillance Forum.
7. The Working Party on Agricultural Quality Standards will continue both its development of standards and its capacity-building activities. In particular, seminars on food quality and international trade will be held in one or more CIS members (e.g. Georgia, Republic of Moldova) and cooperation with other United Nations regional commissions will take place. Work with the Russian Federation on the development and implementation of standards for meat will be continued and, if possible, extended to other CIS members.
8. The Multiplier Point Network will be expanded to all UNECE member States and to more regions in countries with economies in transition. Also, there is a need to further encourage communication among Multiplier Points as well as between the Network and the secretariat.
9. The strengthening of sustainable forest management at the enterprise level will remain a prominent goal of the Capacity Building Project for Sustainable Development of the Russian Timber Sector. Special attention will be given to cooperation with all relevant certification systems



and with environmental non-governmental organizations. Developing the trade logistics of woody biomass for energy production is still a major challenge for all project partners and cooperation in this field will be steadily expanded to other UNECE member States. The dissemination of project results through training and specialized working groups will be actively pursued.

Transport

Major achievements in 2003

1. The Inland Transport Committee adopted Resolution No. 251 on the Fourth Road Safety Week in the UNECE Region. Road safety campaigns will be organized in UNECE member States to make drivers of motor vehicles aware of the vital importance of keeping calm behind the wheel and of being respectful of other drivers.
2. Proposals regarding the introduction of the digital tachograph on new vehicles assigned to international road transport into the European Agreement concerning the Work of Crews of Vehicles Engaged in International Road Transport (AETR) were endorsed; they will become mandatory for Contracting Parties to the AETR four years after the entry into force of the proposed amendments. The tachograph is the device on board commercial vehi-



cles that measures drivers' working hours and rest periods.

3. The Consolidated Resolution on the Facilitation of International Road Transport (R.E.4) has been finalized. R.E.4 is a collection of recommendations for simplified and harmonized road transport procedures in Europe. New provisions include a recommendation regarding access to the profession of road transport operator.
4. Annex II to the European Agreement on Main International Traffic Arteries (AGR) – the E-Road Network – is being modified in order to develop further certain aspects related to the environment and to integrate a number of the recommendations drawn up by the group of experts on safety in tunnels which was established by the UNECE following the tragic accidents in tunnels in Europe in 1999 and 2001.
5. The World Forum for Harmonization of Vehicle Regulations updated 74 regulations annexed to the 1958 Agreement and adopted a new one. This brings the total number of UNECE Regulations to 115. With regard to the 1998 Global Agreement, one additional accession was registered, thus bringing the number of Parties to this Agreement to 22. In this framework, global technical regulations are being prepared on the basis of agreed priorities.
6. The set of Guidelines for Socio-economic Cost-benefit Analysis of Transport Infrastructure Project Appraisal, based on the state-of-the-art methodology used by the international financial institutions and specific CIS needs in particular, was published. Work continued on transport connections between Europe and Central Asia, including also the organization of demonstration runs of block trains along two Euro-Asian routes.
7. In rail transport, amendments to the European Agreement on Main International Railway Lines (AGC) were adopted and

monitoring of border-crossing rail transport in East and South-East European countries was continued.

8. For inland water transport, Resolution No. 252 on the Implementation of the European Agreement on Main Inland Waterways of International Importance (AGN), Resolution No. 49 on the Inventory of the Most Important Bottlenecks and Missing Links in the E Waterway Network and Resolution No. 50 on Technical Requirements for the Prevention of Pollution from Vessels were adopted. The European Code for Inland Waterways was published.
9. Countries in the Caucasus and Central Asia are being included in the European Agreement on Important International Combined Transport Lines and Related Installations and the role of combined transport has been promoted through the development of new recommendations and effective procedures with the aim of amending the Agreement to improve performances in combined transport services.
10. In respect of the Convention on the Harmonization of Frontier Controls of Goods substantive progress was made in developing a new annex 8 on border-crossing procedures for international road transport, including its technical appendices on international technical inspection and vehicle weight certificates.
11. Concerning the Customs Convention on the International Transport of Goods under Cover of TIR Carnets (TIR Convention), considerable progress was made in defining the parameters for the computerization of the TIR procedure.
12. Amendments to the various legal instruments regulating the transport of dangerous goods by road (ADR), rail (RID) and inland waterway (ADN) were adopted in most UNECE countries and will enter into force on 1 January 2005. A consolidated version of the restructured ADR has been published. The ECOSOC Committee of Experts on the Transport of Dangerous Goods and on the Globally Harmonized System of Classification and Labelling of Chemicals published the thirteenth revised edition of the Recommendations on the Transport of Dangerous Goods, Model Regulations; the fourth revised edition of the Recommendations on the Transport of Dangerous Goods, Manual of Tests and Criteria; and the Globally Harmonized System of Classification and Labelling of Chemicals.





13. The 2000 Combined Census of Motor Traffic and Inventory of Standards and Parameters on Main International Traffic Arteries in Europe was published.

Major challenges for 2004

1. The Inland Transport Committee will continue updating the international agreements and conventions that are the backbone of the European inland transport system and will pay special attention to their implementation.
2. In the context of these legal instruments, it will also focus on the development of transport infrastructure in the UNECE region, including Euro-Asian transport links, and promote actively the implementation of the Development Account Project.
3. In order to bring the legal instruments and resolutions in line with the current requirements of the European transport system, the following activities are expected to be undertaken:
 - Adoption of a new protocol to the Convention on the Contract for the International Carriage of Goods by Road;
 - Restructuring and modernization of Consolidated Resolutions RE.1 and RE.2 on Road Traffic and on Road Signs and Signals;
 - Adoption of at least one global technical regulation under the 1998 Global Agreement;
 - Adoption of three new UNECE regulations to be annexed to the 1958 Agreement;
 - Adoption of recommendations on safety in rail tunnels;
4. In addition, the secretariat will implement, together with the ESCAP secretariat, the Development Account Project on inter-regional transport linkages.
 - Increased collaboration with the EC, the International Union of Railways and the Committee of the Organization for Cooperation between Railways to speed up and facilitate railway interoperability throughout Europe;
 - Adoption of an inventory of existing legislative obstacles that hamper the establishment of a harmonized and competitive pan-European inland navigation market and creation of a pan-European recreational navigation network;
 - Extension of the European Agreement on Important International Combined Transport Lines and Related Installations to the Caucasus, Central Asia and beyond and finalization of civil liability rules governing multimodal transport;
 - Finalization of the concept of an international e-TIR procedure;
 - Completion of the new annex 8 on efficient border-crossing procedures for road transport to the Convention on the Harmonization of Frontier Controls of Goods;
 - Drafting of an agreement on customs procedures for rail transit;
 - Adoption of amendments to legal instruments concerning the transport of dangerous goods (ADR, ADN, RID) to reflect technological and industrial developments or to respond to new concerns;
 - Adoption of a new convention on civil liability for damage caused during carriage of dangerous goods by road, rail and inland navigation vessels.

Part 3:

Organizational Structure

Governing Bodies

United Nations Economic Commission for Europe (UNECE)

Chairperson: Mr. Clyde Kull (Estonia)
Vice-Chairpersons:
Mr. Vladimir Thanati (Albania)
Mr. Sergei Aleinik (Belarus)
Mr. Michel Adam (Belgium)

Principal Subsidiary Bodies

Committee on Environmental Policy

Chairperson: Mr. Zaal Lomtadze (Georgia)
Vice-Chairpersons: Mrs. Narin Panariti (Albania)
Ms. Helena Cizková (Czech Republic)
Mr. Bert-Axel Szelinski (Germany)
Mr. Sergey Tveritinov (Russian Federation)
Mr. Jon Kahn (Sweden)
Mr. Jürg Schneider (Switzerland)
Ms. Lynette Poulton Kamakura (United States of America)

Inland Transport Committee

Chairperson: Mr. Peter Päßgen (Germany)
Vice-Chairperson: Mr. Nikolay I. Matyschenko (Russian Federation)

Conference of European Statisticians

Chairperson: Ms. Katherine Wallman (United States of America)
Vice-Chairpersons: Ms. Milva Ekonomi (Albania)
Mr. Dennis Trewin (Australia)
Mr. Luigi Biggeri (Italy)
Mr. Vladimir Sokolin (Russian Federation)
Ms. Irena Krizman (Slovenia)
Mr. Svante Öberg (Sweden)

Committee for Trade, Industry and Enterprise Development

Chairperson: Mr. Alexander Safarik-Pstrosz (Czech Republic)
Vice-Chairpersons: Ms. Ayse Öktem (Turkey)
Mr. Tolondu Toichubaev (Kyrgyzstan)
Mr. Johan Robert Van Kuik (Netherlands)

Committee on Sustainable Energy

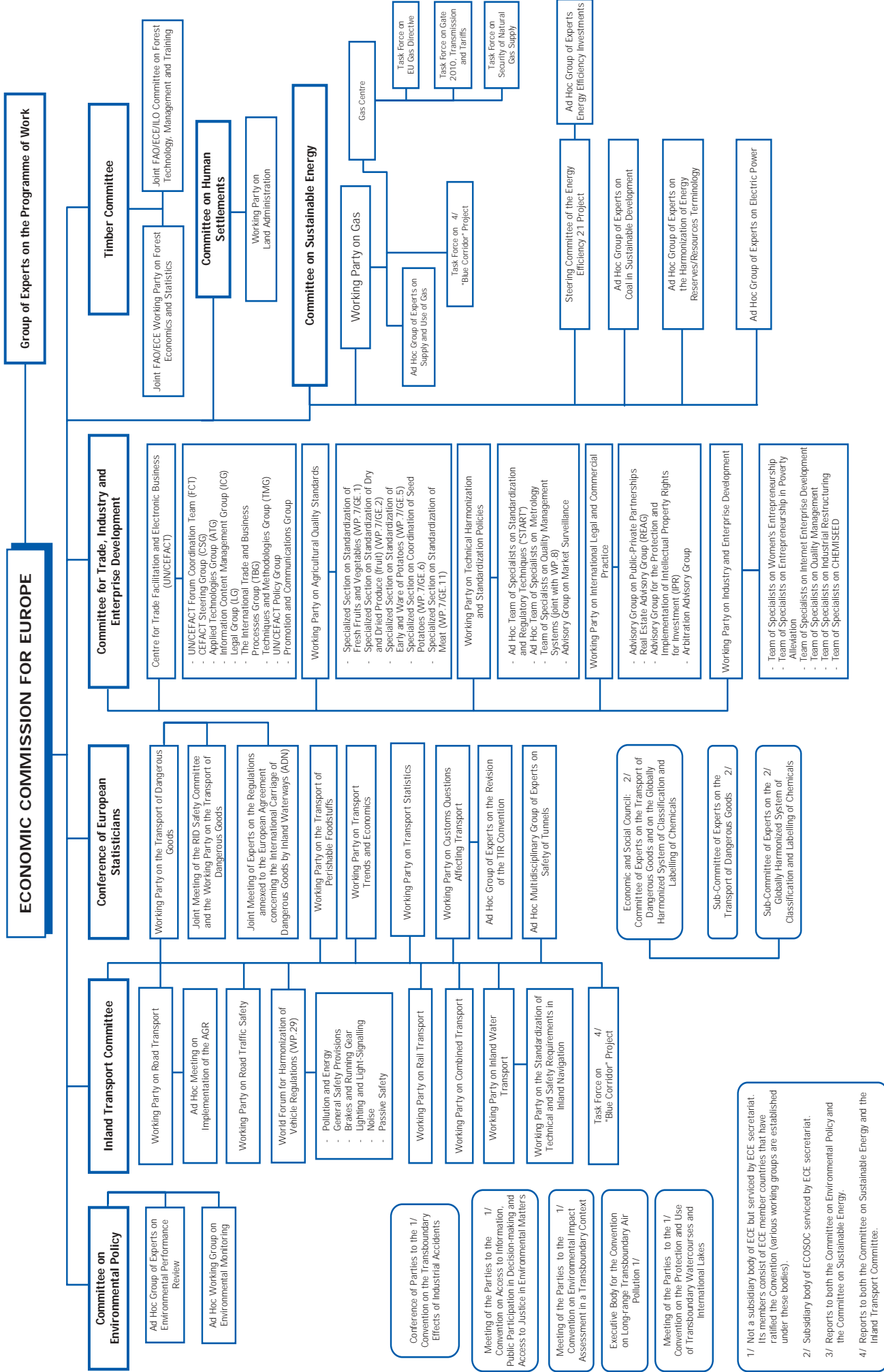
Chairperson: Mr. Miles Greenbaum (United States of America)
Vice-Chairpersons: Mr. Bruno Zluwa (Austria)
Mr. Sergei Mikhailov (Russian Federation)
Alternate: Mr. Boris Reoutov (Russian Federation)
Mr. Trajce Cerepnalkovski (The former Yugoslav Republic of Macedonia)
Mr. Jean-Christophe Füg (Switzerland)
Mr. Laszlo Molnar (Hungary)
Mr. Michel Hors (France)

Timber Committee

Chairperson: Mr. Gheorghe Florian Borlea (Romania)
Vice-Chairpersons: Mr. Jeff Serveau (Canada)
Mr. Heikki Pajujoja (Finland)

Committee on Human Settlements

Chairperson: Ms. Elena Szolgayova (Slovakia)
Vice-Chairpersons: Ms. Doris Andoni (Albania)
Mr. Ernst Hauri (Switzerland)
Ms. Daniela Grabmüllerova (Czech Republic)
Mr. Hubert van Eyk (Netherlands)
Mr. Marek Zawislak (Poland)
Mr. Bengt Kjellson (Sweden)



1/ Not a subsidiary body of ECE but serviced by ECE secretariat. Its members consist of ECE member countries that have ratified the Convention (various working groups are established under these bodies).

2/ Subsidiary body of ECOSOC serviced by ECE secretariat.

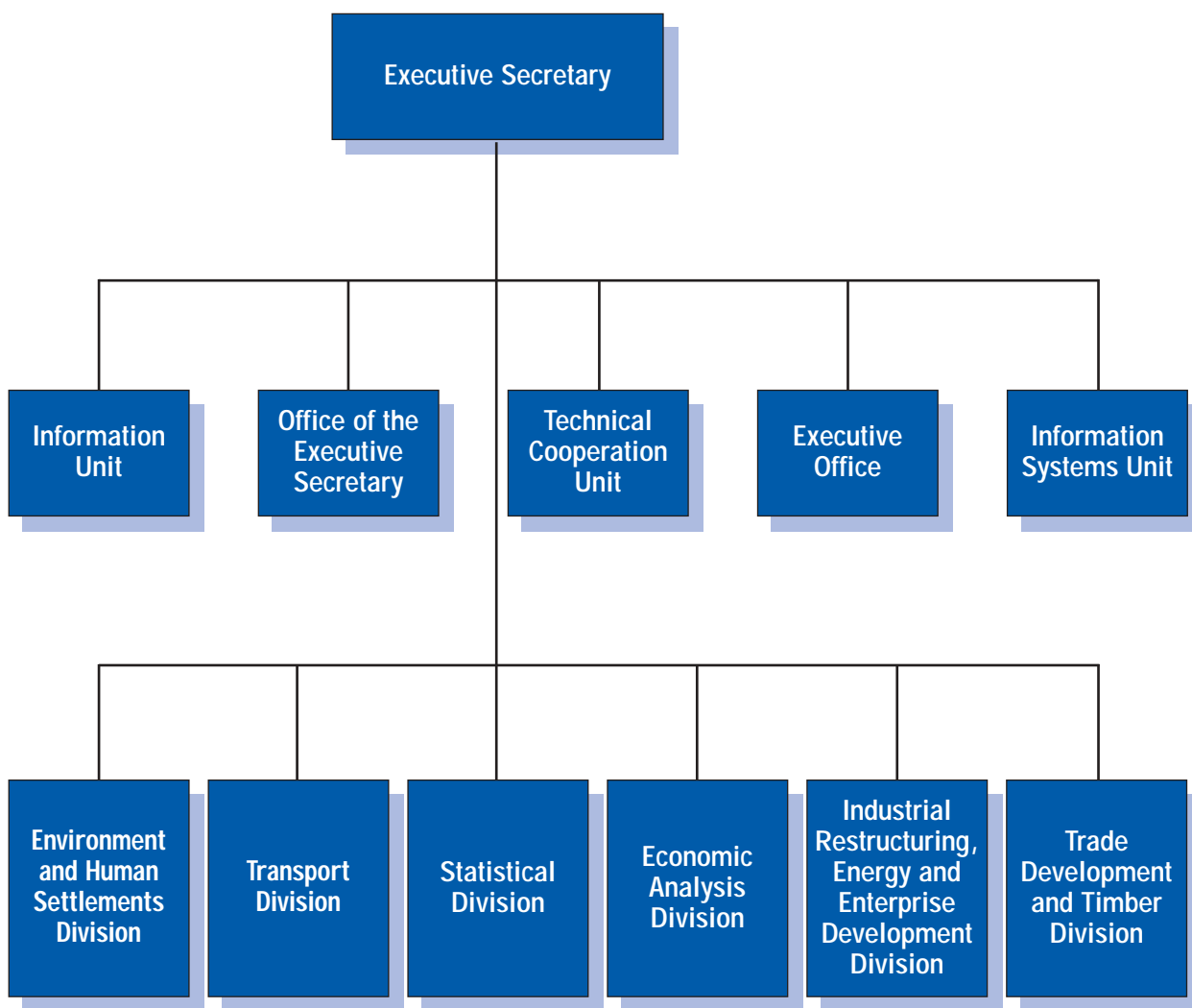
3/ Reports to both the Committee on Environmental Policy and the Committee on Sustainable Energy.

4/ Reports to both the Committee on Sustainable Energy and the Inland Transport Committee.

Member States and Member States Representatives

| | |
|--|---|
| Albania | H.E. Mr. Vladimir THANATI |
| Andorra | H.E. Mr. Francesc BONET CASAS |
| Armenia | Mr. Zohrab MNATSAKIAN |
| Austria | H.E. Mr. Wolfgang PETRITSCH |
| Azerbaijan | Mr. Murad NAJAFOV |
| Belarus | Mr. Sergei ALEINIK |
| Belgium | H.E. Mr. Michel ADAM |
| Bosnia and Herzegovina | H.E. Mr. Miloš VUKAŠINOVIĆ |
| Bulgaria | H.E. Mr. Dimiter TZANTCHEV |
| Canada | H.E. Mr. Sergio MARCHI |
| Croatia | H.E. Mr. Gordan MARKOTIĆ |
| Cyprus | H.E. Mr. James C. DROUSHIOTIS |
| Czech Republic | H.E. Mr. Alexander SLABÝ |
| Denmark | H.E. Mr. Henrik Rée IVERSEN |
| Estonia | H.E. Mr. Clyde KULL |
| Finland | H.E. Mr. Vesa HIMANEN |
| France | H.E. Mr. Bernard KESSEDJIAN |
| Georgia | H.E. Mr. Alexander CHIKVAIDZE |
| Germany | H.E. Mr. Michael STEINER |
| Greece | H.E. Mr. Tassos KRIEKOUKIS |
| Hungary | H.E. Mr. Tibor TÓTH |
| Iceland | H.E. Mr. Stefán Haukur JÓHANNESSON |
| Ireland | H.E. Ms. Mary WHELAN |
| Israel | H.E. Mr. Yaakov LEVY |
| Italy | H.E. Mr. Paolo BRUNI |
| Kazakhstan | H.E. Mr. Nourlan DANENOV |
| Kyrgyzstan | H.E. Ms. Zeinep SHAIMERGENOVA |
| Latvia | H.E. Mr. Jānis KĀRKLINŠ |
| Liechtenstein | H.E. Mr. Norbert FRICK |
| Lithuania | H.E. Mr. Algimantas RIMKŪNAS |
| Luxembourg | H.E. Mr. Alphonse BERNS |
| Malta | H.E. Mr. Saviour F. BORG |
| Monaco | H.E. Mr. Gilles NOGHES |
| Netherlands | H.E. Mr. Ian DE JONG |
| Norway | H.E. Mr. Sverre BERGH JOHANSEN |
| Poland | H.E. Mr. Krzysztof JAKUBOWSKI |
| Portugal | H.E. Mr. José Caetano da COSTA PEREIRA |
| Republic of Moldova | H.E. Mr. Dumitru CROITOR |
| Romania | Mr. Petru DUMITRIU |
| Russian Federation | H.E. Mr. Leonid SKOTNIKOV |
| San Marino | H.E. Ms. Federica BIGI |
| Serbia and Montenegro | Ms. Dusanka DIVJAK-TOMIĆ |
| Slovakia | H.E. Mr. Kálmán PETÖCZ |
| Slovenia | H.E. Mr. Aljaž GOSNAR |
| Spain | H.E. Mr. Joaquín PÉREZ-VILLANUEVA Y TOVAR |
| Sweden | H.E. Ms. Elisabet BORSIIN BONNIER |
| Switzerland | H.E. Mr. Pierre-Louis GIRARD |
| Tajikistan | H.E. Mr. Rashid ALIMOV |
| The former Yugoslav Republic of Macedonia | Ms. Dragica ZAFIROVSKA |
| Turkey | H.E. Mr. Türkekul KURTTEKIN |
| Turkmenistan | H.E. Mrs. Aksoltan T. ATAEVA |
| Ukraine | Mr. Mykhailo SKURATOVSKYI |
| United Kingdom | H.E. Mr. Nicholas Alan THORNE |
| United States | H.E. Mr. Kevin E. MOLEY |
| Uzbekistan | Mr. Badriddin OBIDOV |

Secretariat



Number of UNECE staff members (2003)

| | |
|-------------------|------------|
| Regular staff | 198 |
| Regional advisers | 8 |
| Project staff | 13 |
| TOTAL | 219 |

Management



Executive Secretary
Brigita
Schmögnerová



**Office of the
Executive Secretary**
Paolo Garonna, Deputy
Executive Secretary
(until October 2003)



Susan Bartolo,
Special Assistant
to the Executive
Secretary and
Secretary of
the Commission



Patrice Robineau,
Senior Adviser to the
Executive Secretary and
(from October 2003)
Acting Deputy
Executive Secretary



**Economic Analysis
Division**
Abdur Chowdhury,
Director



**Environment and
Human Settlements
Division**
Kaj Bärhund,
Director



**Statistical
Division**
Heinrich Brüngger,
Director



**Industrial
Restructuring,
Energy and Enterprise
Development Division**
George Kowalski,
Director



**Technical
Cooperation**
Andrey Vasilyev,
Director



**Trade Development
and Timber Division**
Carol Cosgrove-Sacks,
Director



**Transport
Division**
José Capel Ferrer,
Director

Budget

UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE REGULAR BUDGET (in thousands of US dollars)

| | 2000-2001 final expenditures | 2002-2003 allotments |
|--|------------------------------------|-------------------------|
| I. REGULAR BUDGET (SECTION 18) | | |
| Post items | 36,456.1 | 40,599.2 |
| Non-post items | 2,706.6 | 3,199.6 |
| TOTAL: | 39,162.7 | 43,798.8 |
| II. REGULAR PROGRAMME OF TECHNICAL COOPERATION (SECTION 21) | | |
| General Temporary Assistance staff (Regional Advisers) | 2,246.3 | 2,719.1 |
| Other non-post items | 541.7 | 199.8 |
| TOTAL: | 2,788.0 | 2,918.9 |
| III. UN DEVELOPMENT FUND (SECTION 33) | | |
| Non-post items | 1,086.4 | 1,470.2 |
| TOTAL: | 1,086.4 | 1,470.2 |

UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE EXTRABUDGETARY RESOURCES (in thousands of US dollars)

| TYPE OF FUND | 2000-2001 final expenditures | 2002-2003 allotments |
|--|------------------------------------|-------------------------|
| General Trust Funds (including UNFIP) | 7,311.8 | 7,807.8 |
| Local Technical Cooperation Trust Funds/Projects | 3,208.1 | 6,341.3 |
| UNDP/UNFPA Projects | 675.1 | 856.8 |
| TOTAL: | 11,195.0 | 15,005.9 |

Publications (selected)

THE COMMISSION

UNECE Report

- 2003-2004
ECE/INF/NONE/2003/45 – January 2004
- 2002-2003
ECE/INF/NONE/2003/12 – February 2003

UNECE Compendium of Legal Instruments, Norms and Standards

ECE/INF/NONE/2003/01 – E,F,R

UNECE Compendium of Press Releases

- July-December 2003
- January-June 2003

The Musketeers Conquer the Net – A "teen" guide to getting online

ECE/INF/NONE/2003/37 – Sales # GV.E.03.0.19 – ISBN 92-1-101060-8 – US\$ 5 – E,F,R, Spanish

ECONOMIC ANALYSIS AND POPULATION

- *Economic Survey of Europe*

Economic Survey of Europe, 2003 No. 2

Economic Survey of Europe, 2003 No. 1

ECE/EAD/2003/1 – Sales # E.03.II.E.26 – ISBN 92-1-116841-4 – US\$ 70

- *Occasional Papers*
- # 1 **The Role of Institutions in Economic Development. Gunnar Myrdal Lecture**
Sales # E.03.II.E.50 – ISBN 92-1-116880-5 – US\$ 10
- # 2 **The Accession of Central European Countries to the European Union: The Trade and Investment Effects on Belarus, the Russian Federation and Ukraine**
Sales # E.03.II.E.54 – ISBN 92-1-116881-3 – US\$ 15



Population

- *Population ageing and the status of older persons*

Population Ageing and Socio-Economic Status of Older Persons in Estonia

Sales # E.03.II.E.57 – ISBN 92-1-116884-8

Ageing Populations: Opportunities and Challenges for Europe and North America

Sales # E.03.II.E.39 – ISBN 92-1-116856-2

ENTERPRISE DEVELOPMENT

Benchmarking governmental SME policies

Best Practice in the Development of Entrepreneurship and SMEs in Countries in Transition:

- **The Croatian Experience**
- **The Slovenian Experience**
OPA/AC.30/1 – Report issued by the Slovenian Ministry of Economy – 2003
- **The Belarusian Experience**
ECE/TRADE/302 – Sales # E.03.II.E.32 – ISBN 92-1-116847-3 – US\$ 22

Entrepreneurship and SME development

Youth in the UNECE Region: Realities, Challenges and Opportunities

ECE/TRADE/338 & ECE/OPA/2003/2 – Sales # E/R.03.II.E.47 – ISBN 92-1-016356-7 -US\$ 40

Small and Medium-Sized Enterprises in Countries in Transition

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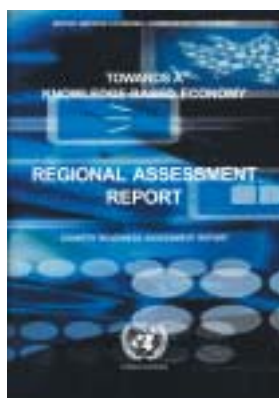
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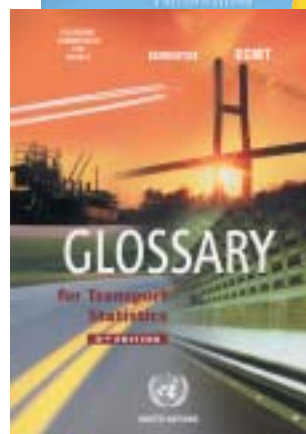
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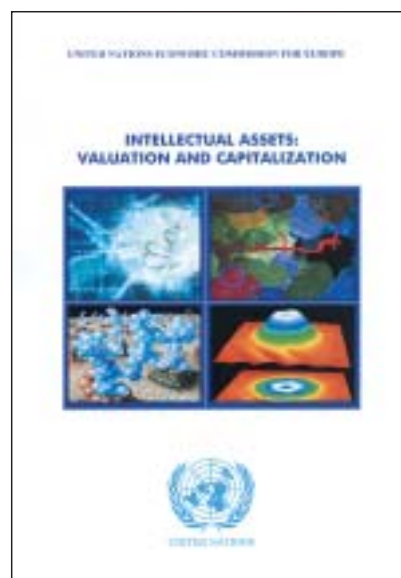
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