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Timber Committee

FOOD AND AGRICULTURE ORGANIZATION  
European Forestry Commission

**JOINT FAO/ECE WORKING PARTY ON FOREST ECONOMICS AND STATISTICS**  
Twenty-second session, 26-28 May 1999

**Next steps in programme of outlook studies for Europe**

(Item 4 of the Provisional Agenda)

**Note by the secretariat**

Due to staff shortages, it has not been possible to advance on the outlook studies work since the Working Party's last session, but this situation has now been remedied. The Working Party will be briefed on FAO outlook work and is invited to discuss the direction and strategy of the outlook work to be carried out under its auspices.

1. At its twenty-first session in 1997, the Working Party reviewed the fifth study of European timber trends and prospects (ETTS V), and started to consider future work on outlook studies. The secretariat explained that work on the next round of outlook studies would start when secretariat resources were available, in particular when the vacant post in the Geneva team was filled. The process of recruitment has taken longer than expected, so that the expert recruited will only be on post a few days before the Working Party session. In the meantime it has not been possible to make progress on outlook study work, as priority had to be given to completing TBFRA and supporting the pan-European process, in addition to carrying out the regular programme of statistics and market review, servicing regular sessions etc.

2. However the situation as regards outlook studies is now more satisfactory, firstly because the new staff member will in fact be on post by the Working Party session and second because there has been intense activity in the past three years by the FAO Forestry Department at the global and regional level<sup>1</sup>. For that reason, it seemed appropriate to invite the Working Party delegates to participate in an informal and unstructured discussion of how the ECE/FAO programme of outlook studies should develop in future. It is proposed the discussion should have two parts:

- A presentation of recent outlook study work carried out by the FAO Forestry Department, covering not only results, but also methods and "philosophy";
- An unstructured discussion of the future ECE/FAO outlook work.

3. The Working Party may wish also to decide whether to re-form the ETTS "core team", and agree on a date for its next meeting.

4. With regard to future outlook work, some questions which delegates may wish to address would include the following:

- Lessons of ETTS V;
- How to monitor real trends against ETTS V scenarios (what areas need close analysis and which not?)

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<sup>1</sup> Notably the Global Fibre Supply Model, the Global Forest Products Outlook Study and the Asia-Pacific Forestry Sector Outlook Study. For an overview of these activities, see *The State of the World's Forests 1999*.

- Should future ETTS work be based on the existing ETTS V analytical system, or should a new set of analytical tools and methods be developed?
- Should future ETTS work be focussed on particular policy issues, and if so which ones? Or should it remain a more general work, essentially concentrating on producing a credible base scenario for the continent?
- Should it continue to concentrate on forest product supply/demand issues, or should a wider set of issues be addressed?
- How to combine best the analytical rigour, and internal consistency, notably as regards assumptions, of a model-based approach, with the closeness to issues and the "real world", which may be generated by a close dialogue with national correspondents?
- Who are the actual and potential users of outlook studies and are the needs of different groups compatible? If not, how to set priorities?