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# WITHDRAWAL SHEET

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**File Folder** SOVIET BLOC ECONOMIC AND FINANCIAL SITUATION  
UPDATES (8/27/82-12/10/82)

**FOIA**

F03-002/5

**Box Number** 20

SKINNER

135

ID	Doc Type	Document Description	No of Pages	Doc Date	Restrictions
169277	MEMO	W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL SITUATION UPDATE #37 <b>PAR 1/7/2013 CREST NLR-748-20-6-1-8</b>	3	8/27/1982	B1
169278	REPORT	RE USSR ECONOMY AT MIDYEAR <b>PAR 10/11/2010 CREST NLR-748-20-6-2-7</b>	5	8/20/1982	B1
169279	MEMO	RE USSR CROPS <b>PAR 4/8/2013 CREST NLR-748-20-6-3-6</b>	2	8/1/1982	B1
169280	CABLE	251641Z AUG 82	1	8/25/1982	B1
169281	CABLE		3	8/20/1982	B1
169282	MEMO	W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #38	3	9/14/1982	B1
169283	MEMO	W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #41	3	10/21/1982	B1

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ID	Doc Type	Document Description	No of Pages	Doc Date	Restrictions
169284	MEMO	W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #40	3	10/7/1982	B1
169285	MEMO	W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #42	3	11/8/1982	B1
169286	MEMO	W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #43	2	12/10/1982	B1

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**National Security Council  
The White House**

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Bud McFarlane	_____	<u>m</u>	_____
Jacque Hill	_____	_____	_____
Judge Clark	_____	_____	_____
John Poindexter	_____	_____	_____
Staff Secretary	<u>9</u>	_____	_____
Sit Room	<u>1</u>	_____	<u>Dacom cover memo only</u>
<u>Florence</u>	<u>2</u>	_____	_____

I-Information A-Action R-Retain D-Dispatch N-No further Action

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cc: VP Meese Baker Deaver Other \_\_\_\_\_

COMMENTS

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5974

3

MEMORANDUM

NATIONAL SECURITY COUNCIL

169277

August 27, 1982

~~TOP SECRET/~~CODEWORD  
INFORMATION

State Dept. review completed

DECLASSIFIED IN PART

NLR 748-20-6-1-8

MEMORANDUM FOR WILLIAM P. CLARK

FROM: WILLIAM F. MARTIN WFM

BY CDB NARA DATE 9/17/15

SUBJECT: Soviet Bloc Financial and Economic Situation  
Update #37

Highlights

[Redacted]

The USSR has used common prisoners to construct oil and natural gas pipelines. Normally, political prisoners are not used in any type of construction except to do labor intensive tasks in isolated or hard to reach areas where heavy equipment could not be used.

[Redacted]

Soviet Union

[Redacted]

Canadian shipping officials report that the Canadian Wheat Board (CWB) has sold 5 million tons of wheat to the USSR in the first year of their five year Canadian-USSR agreement. Officials are convinced that "whatever the USSR wants to purchase, the CWB will be most willing to provide." (e)

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DECLASSIFY ON: OADR

~~TOP SECRET~~

~~TOP SECRET/CODEWORD~~

2

4

Eastern Europe



Other

Vietnam has little chance of solving its economic troubles as long as it remains isolated from non-communist markets and assistance. The failure of socialist economic policies and the difficulties of integrating the southern part of the country have created economic stress. The invasion and occupation of Kampuchea have siphoned off resources urgently needed for development. (Source: INR analysis)

25

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5

Cuba has launched an aggressive campaign to refinance its debt and promote foreign investment. Castro's growing dependence on Western banks has meant debts 58 times the level in 1959. If Soviet credits are added, the \$10 billion total is four times that of Brazil's on a per capita basis. (Source: Cuban-American National Foundation) (U)

Attachments

cc: Tom Reed  
Dick Boverie  
Walt Raymond  
Norman Bailey  
Dick Pipes  
Henry Nau  
Paula Dobriansky

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Cables are available from William Martin (395-5607).

~~TOP SECRET/CODEWORD~~

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A

~~Secret~~

Excerpt from International Economic & Energy Weekly

**USSR: The Economy at Midyear (U)**

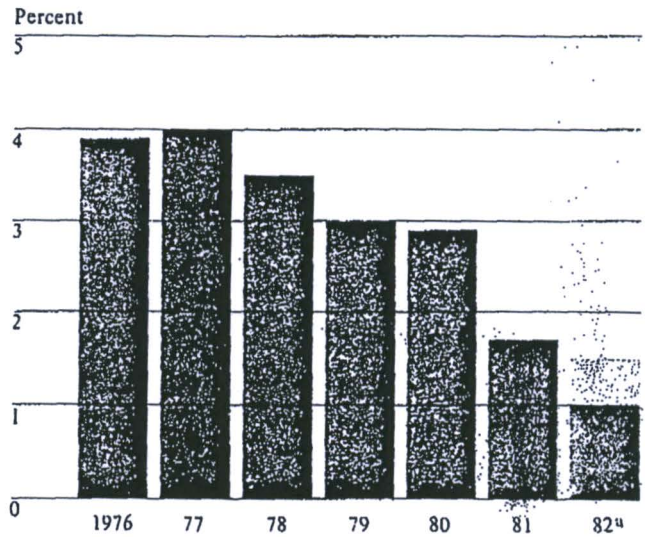
A 7  
169278

The slowdown in Soviet economic growth in evidence since 1978 continued through the first six months of 1982. Results released for January through June point to GNP growth in 1982 of less than 2 percent for the fourth consecutive year. The rate of increase in industrial production, which hit a post-World War II low last year, will probably be even less this year—about 1 to 1.5 percent. A fourth consecutive poor grain harvest also is in the cards. On the brighter side, there has been a slight rebound in energy production so far this year and some improvement in Moscow's hard currency balance-of-payments position. (C)

**Industry: Serious Problems Continue**

Soviet industrial production in first-half 1982 was slightly more than 1 percent higher than in first-half 1981 according to a CIA calculation based on fulfillment results just published by the Central Statistical Administration. A similar showing during the second half of the year would result in industry's worst performance since World War II. (U)

**USSR: Industrial Production Growth**



<sup>a</sup> Estimated.

Unclassified

587355 8-82

The energy sector, in contrast, has performed relatively well so far this year. Production of all major fuels increased. Gas continues to lead the way, but even coal output, in decline the last three years, bounced back slightly. (U)

Oil production in January through June was 0.4 percent higher than in the same period in 1981. We estimate that production for the year will be up slightly from last year's output and only marginally below the 1982 target of 614 million tons. The rise in coal production can probably be attributed mainly to the startup of a large-capacity coal excavator

MORI/CDF per C05184816

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NLRR CRPT

BY CU NARA DATE 4/8/13

~~Secret~~

20 August 1982

~~Secret~~**USSR: Industrial Performance***Percent growth <sup>a</sup>*

	1981	1st-Half 1981	1st-Half 1982
Civilian industry	1.7	2.0	1.2
Electric power	2.3	2.3	2.8
Fuel products	0.9	1.5	1.8
Ferrous metals	0.2	-0.5	-1.6
Nonferrous metals	0.3	1.0	-0.1
Forest and paper products	2.2	1.7	1.9
Construction materials	1.2	1.1	-2.3
Chemicals	3.5	3.8	1.1
Civilian machinery	1.8	2.6	2.3
Food industry	1.7	1.1	0.5
Light industry	2.5	2.6	0.5

<sup>a</sup> Percent change in output between the comparable period of the preceding year and the given period.

This table is Unclassified.

at an open pit mine in the Ekibastuz basin. For the year, we estimate coal production will be about 710 million tons—6 million tons more than in 1981 but 18 million tons below plan. (C)

Gas production continues its rapid advance. Output through the first six months of this year increased 8 percent compared with first-half 1981. The USSR should have little difficulty meeting the 1982 plan of 492 billion cubic meters. Almost all of the increase in gas output is coming from Urengoy in western Siberia, which by 1985 will account for 40 percent or more of Soviet gas production. The future of the gas industry hinges heavily, therefore, on building the six large-diameter pipelines from the Urengoy field—each at least 2,800 kilometers long. To date, construction is on schedule. (C)

Growth in other industrial sectors remains sluggish. In the chemical industry, for example, output of plastics, chemical fibers, and sulfuric acid—all vital raw materials for other industries—was below plan. Civilian machine-building output, up 2.3 percent compared with the first six months of last

**USSR: Energy Production**

	1980	1981	1st-Half 1981	1st-Half 1982	Projected 1982
Oil (million tons)	603	609	301	302-303	610-612
Coal (million tons)	716	704	361	363	710
Gas (billion cubic meters)	435	465	228	247	498

This table is Unclassified

year, is not rising fast enough to meet plans for supplying producer and consumer durables to the economy. Production of turbines and turbine generators, electric motors, equipment for the petroleum industry, freight cars, diesel locomotives, and motor vehicles was below levels of first-half 1981. The largest gains occurred in the production of metal-cutting machine tools, computer equipment, electric locomotives, instruments, and agricultural machinery; output of industrial robots almost doubled. The poor overall performance of the machine-building sector is particularly damaging to Soviet investment policy, the cornerstone of which is increased emphasis on replacement of machinery and equipment. (U)

**Investment and Employment**

State capital investment—which typically makes up about seven-eighths of total capital investment—was 54 billion rubles during the first six months of 1981. Investment activity will have to be stepped up considerably in the second half of the year to reach the 1982 target of 121.6 billion rubles, itself a 2-percent drop compared with 1981. Investment growth planned for the current five-year period is by far the lowest of the post-World War II era. (U)

Employment in industry rose 0.7 percent during first-half 1982 compared with the first six months

~~Secret~~

20 August 1982

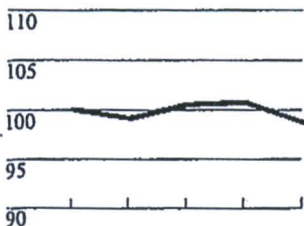
**USSR: Industrial Production, by Commodity**

Index: Jan-Jun 1978=100

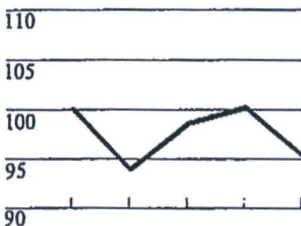
Note change in scales

**Industrial Materials**

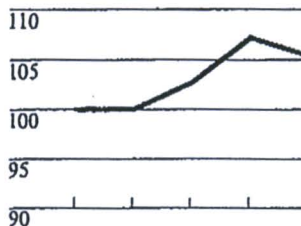
**Crude Steel**



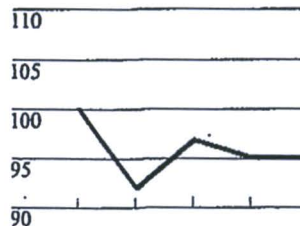
**Cement**



**Sulfuric Acid**

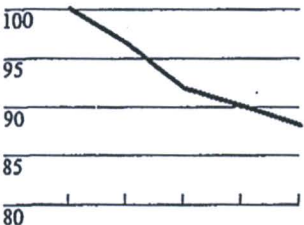


**Commercial Timber**

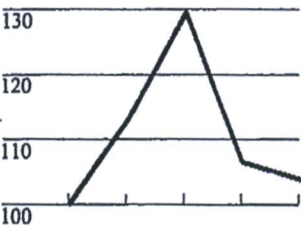


**Consumer Items**

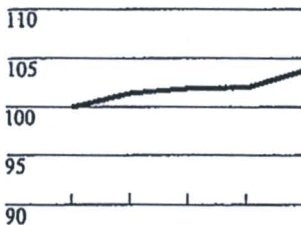
**Freight Cars**



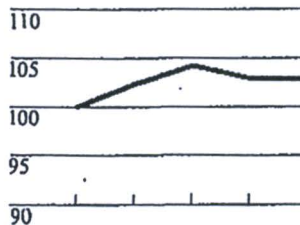
**Turbines**



**Excavators**

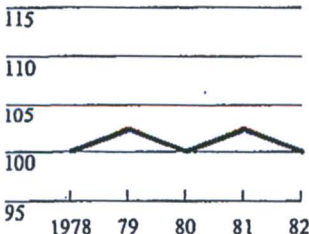


**Trucks**

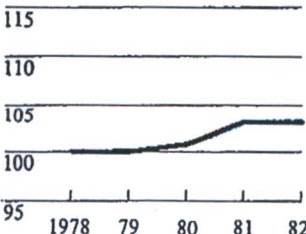


**Heavy Industrial Products**

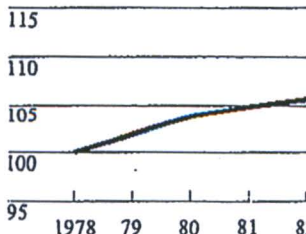
**Meat**



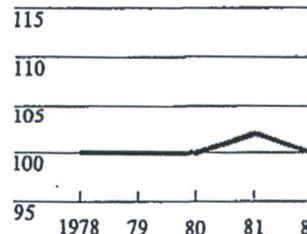
**Whole Milk Products**



**Textiles**



**Refrigerators**



\*First half of the year over the first half of 1978.

Unclassified

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**USSR: Freight Turnover Growth***Percent*

	1976-78 <sup>a</sup>	1979	1980	1981	1st Half 1982 <sup>b</sup>
<b>Total</b>	4.6	0.6	3.3	2.3	NA
Railroads	1.9	-2.3	2.7	1.8	-2.0
Inland waterways	3.2	-4.5	5.2	4.3	3.0
Oil pipelines	16.4	8.7	6.6	3.9	3.0
Trucks	5.4	3.4	5.5	5.0	4.0

<sup>a</sup> Average annual percent change.<sup>b</sup> Change compared with the first half of 1981.

This table is Secret Noform.

of 1981. This rate exceeds the approximately 0.5-percent annual rate of employment growth implicitly targeted for industry during 1981-85 (increased labor productivity is to provide 90 percent of the growth in industrial output). The largest increases occurred in the energy sector—electric power, 2.0 percent; oil, 3.0 percent; gas, 1.0 percent; and coal, 2.6 percent. Greater-than-average gains occurred in ferrous and nonferrous metals and in the chemical industry. Employment in most consumer-related industries either was stagnant or fell—employment economywide increased 1.1 percent. (U)

**Agriculture: Another Below-Trend Year**

Total farm output this year is expected to increase by slightly more than 1 percent from the 1981 level, but it will still be some 7 percent below the record output achieved in 1978. The Soviets are facing a fourth straight disappointing grain harvest. As of early August, we estimate the Soviet grain crop in 1982 at 165 million tons, not much above last year's unofficially reported 158 million tons. A grain harvest of this size would be more than 70 million tons below plan and at least 65 million tons short of Moscow's needs for food, seed, livestock feed, and industrial uses. Large grain imports will be necessary again in marketing year (MY) 1983 (July 1982-June 1983) following record purchases of 45 million tons of grain (excluding rice) in MY 1982. (C)

Even so, grain imports this year cannot fully compensate for domestic production shortfalls. The USSR's transportation system probably can handle no more than an estimated 50 million tons of grain imports in MY 1983. As a consequence, some distress slaughtering—primarily of hogs—is likely. But even if livestock herds were reduced by 3 percent—as in 1975—meat production would not exceed 15 million tons (compared with 15.2 million tons in 1981). (C)

**Transportation**

Freight turnover on the railroads—the primary mode of freight transportation in the Soviet Union—declined 2 percent in the first six months of 1982 compared with first-half 1981. This is the first time rail freight turnover has declined since 1979, when severe winter weather west of the Urals crippled rail operations causing shortages of raw materials and fuel throughout much of the economy. The main reason for the decline is a severe shortage of railcars; railcar production has declined steadily since 1976. The shortage of railcars in the first half of 1982 was particularly disruptive to the transport of mineral fertilizers, timber, and oil. (U)

**Implications for Consumption**

Supplies of livestock products to the Soviet consumer continue to fall. Production of meat and milk in the socialized sector was down 2 and 3 percent, respectively, from January-June 1981 levels. Even if Moscow imports record amounts of grain and meat again this year, we estimate that per capita meat consumption will decline. Meat and butter rationing—both informal purchase limitations and by coupon—is continuing in many cities. Both embassy travelers and other observers, in fact, have reported that food shortages and the extent of rationing are worse now than last year. (C)

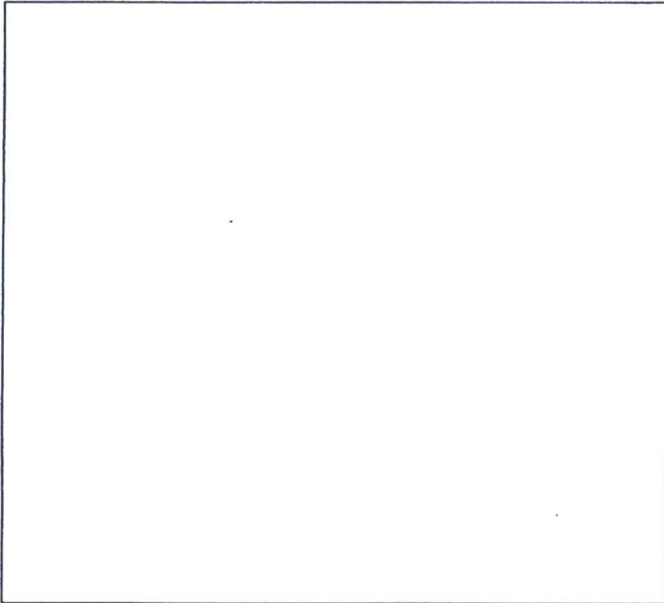
The average monthly wage of workers rose 2.7 percent compared with the first six months of 1981.

~~Secret~~

20 August 1982

That increase is in line with the increases of recent years and within the guidelines set down for the 1981-85 plan. Rising money wages have been one cause of a growing excess demand for consumer goods in the USSR in recent years. More important, however, has been the lagging production of consumer goods. In general, growth in the production of soft goods and consumer durables has slowed, and the mix of goods produced has not changed fast enough to keep up with rising consumer demand. (U)

**Foreign Trade: Payments Position Improves**



For the year as a whole, growing expenditures for grain imports are likely to level off as lower prices offset a somewhat higher volume of imports. Last year, hard currency outlays for grain and agricultural products amounted to more than \$11 billion, or 40 percent of all hard currency imports. Purchases of Western machinery and equipment are likely to remain about the same as last year. (C)

All things considered, Moscow has a good chance to hold the trade deficit to \$3 billion—\$1 billion less than in 1981. Even if arms sales fall below the \$5 billion level of 1981, as appears likely, the current account surplus could remain at about last

year's \$700 million level. Furthermore, the USSR may not need to sell as much gold this year as it did in 1981; at today's depressed prices this would be to its advantage. We estimate Moscow's gold sales so far this year at 50-100 million tons, compared with 200 million tons for all of 1981. (C)

**Outlook**

On balance, we estimate that Soviet GNP will rise by about 1.5 percent in 1982—the fourth consecutive year of growth at less than 2 percent. The sluggish growth of industrial output is particularly important because (1) the deceleration is general and widespread and not just a result of the effects of recent poor harvests on the food processing and light industries, and (2) the slowdown has arrived before the much advertised labor and energy shortages have really had a chance to move center stage. If they are to halt the slowdown, the Soviets must reverse the downward trend in productivity growth of the last several years. (U)

*This article is Secret NoFORN.*

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**USSR: Implications of  
a Fourth Consecutive  
Poor Grain Crop (U)**

169279

**Summary**

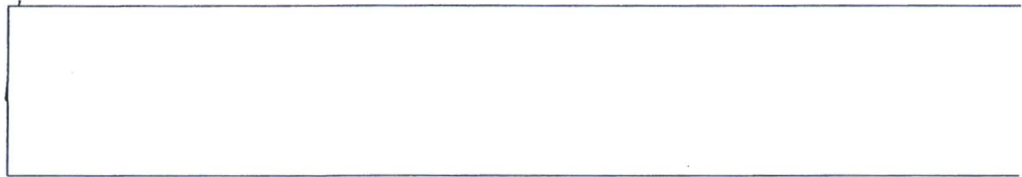
The outlook for the 1982 Soviet grain crop has deteriorated over the past two months. We now estimate that the grain harvest will amount to only about 165 million tons—more than 70 million tons below plan and 40 million tons below the annual average for 1976-80.<sup>1</sup> Major uncertainties in the weather for the remainder of the season suggest the crop could fall below last year's unofficially reported 158-million-ton level. A fourth consecutive poor Soviet grain crop will have an impact on:

- The livestock sector, setting back longstanding plans to boost meat and milk output.
- The consumer sector, thwarting hopes for rapid improvement in quality of diet.
- The foreign trade sector, perpetuating heavy outlays for Western grain and other farm products.

The political repercussions probably will be significant as well. Debate and conflicts on resource allocation within the leadership will be sharpened—especially in the current succession environment, and at a time of slowing economic growth. (C NF)

Even in years of poor harvests, the Soviet Union produces more than enough grain to supply its population with bread and other grain products. Its problem is in supplying feed to maintain livestock herds and to expand meat production. The meat program has been the centerpiece of Brezhnev's consumer program since he took power in late 1964. As recently as last May's plenum devoted to agriculture, he promised to improve food supplies this year. But now, even with record high meat imports, per capita supplies probably will fall slightly. Overall availability of farm products per capita will be about 6 percent below the 1978 peak. (C)

25X1



<sup>1</sup> See DDI Intelligence Assessment SOV/OGI 82-10116 (Secret NF NC), August 1982, *USSR: Grain Crop Issues*. (U)

*Information available as of 1 August 1982  
has been used in the preparation of this report.*

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NLRR *Crest*

BY *CN* NARA DATE *4/8/13*

~~Secret~~  
SOV 82-10128X  
August 1982

critical to economic growth plans. We believe, however, that the Soviet leaders will import the foodstuffs required to maintain the nation's diet close to current levels despite the economic cost—the political cost of increasing consumer dissatisfaction is probably too high to do otherwise. But in the face of a fourth consecutive disappointing harvest, the leadership may call into question its long-term policy on agriculture. (C)

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TO CLARK

FROM MARTIN

01/4/15 EDB

DOC DATE 27 AUG 82

KEYWORDS: EAST WEST ECONOMICS USSR

SUBJECT: SOVIET BLOC FINANCIAL & ECONOMIC SITUATION UPDATE #37

ACTION: FOR INFORMATION DUE: STATUS IX FILES

FOR ACTION

FOR CONCURRENCE

FOR INFO

CLARK

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RAYMOND

BAILEY

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COMMENTS

REF# LOG 8205876 NSCIFID ( H / )

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169282	MEMO  W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #38	3	9/14/1982	B1

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Freedom of Information Act - [5 U.S.C. 552(b)]

- B-1 National security classified information [(b)(1) of the FOIA]
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341

6359

Package # 6259 25

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82 SEP 15 10:41

	SEQUENCE TO	HAS SEEN	ACTION
John Poindexter	<u>1</u>	<u>[Signature]</u>	
Bud McFarlane	<u>2</u>	<u>[Signature]</u>	
Jacque Hill	<u>3</u>	<u>[Signature]</u>	
Judge Clark	<u>4</u>	<u>[Signature]</u>	<u>I</u>
John Poindexter			
Staff Secretary			
Sit Room			

I-Information   A-Action   R-Retain   D-Dispatch   N-No further Action

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COMMENTS

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OF CLASSIFIED ENCLOSURES

RECEIVED 15 SEP 82 11

TO CLARK

FROM MARTIN *9/4/82 (03)*

DOC DATE 14 SEP 82 *X*

KEYWORDS: EAST WEST ECONOMICS      USSR  
EUROPE EAST      GRAINS  
INTL TRADE      INTL FINANCE

SUBJECT: SOVIET BLOC ECONOMIC & FINANCIAL UPDATE #38

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ACTION: FOR INFORMATION      DUE:      STATUS IX      FILES

FOR ACTION

FOR CONCURRENCE

FOR INFO

CLARK

BOVERIE

REED

RAYMOND

PIPES

NAU

COMMENTS

REF#      LOG      NSCIFID      ( N / )

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169283	MEMO  W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #41	3	10/21/1982	B1

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Freedom of Information Act - [5 U.S.C. 552(b)]

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82 OCT 21 P 3: 27

	SEQUENCE TO	HAS SEEN	ACTION
John Poindexter	<u>1</u>	<u>[Signature]</u>	
Bud McFarlane	<u>2</u>	<u>[Signature]</u>	
Jacque Hill	<u>3</u>	<u>[Signature]</u>	
Judge Clark	<u>4</u>	<u>[Signature]</u>	<u>I</u>
John Poindexter			
Staff Secretary	<u>5</u>		
Sit Room			

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RECEIVED 21 OCT 82 18

TO CLARK

FROM MARTIN

9/4/85 CAB

DOC DATE 21 OCT 82

KEYWORDS: USSR

ECONOMICS

INTL FINANCE

SUBJECT: SOVIET BLOC ECONOMIC & FINANCIAL SITUATION UPDATE 41

ACTION: FOR INFORMATION

DUE:

STATUS IX FILES

FOR ACTION

FOR CONCURRENCE

FOR INFO

CLARK

BAILEY

ROBINSON

PIPES

NAU

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COMMENTS

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169284	MEMO  W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #40	3	10/7/1982	B1

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Freedom of Information Act - [5 U.S.C. 552(b)]

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ID 8206808

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RECEIVED 08 OCT 82 10

TO CLARK

FROM MARTIN

9/4/85 WMB

DOCDATE 07 OCT 82

KEYWORDS: ECONOMICS

USSR

SUBJECT: SOVIET BLOC ECONOMIC & FINANCIAL SITUATION UPDATE #40

ACTION: FOR INFORMATION

DUE:

STATUS IX FILES

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CLARK

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PIPES  
DOBRIANSKY  
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169285	MEMO  W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #42	3	11/8/1982	B1

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Freedom of Information Act - [5 U.S.C. 552(b)]

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82 NOV 8 P12: 48

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John Poindexter	<u>1</u>	<del>X</del>	<u>I</u>
Bud McFarlane	<u>2</u>	<u>M</u>	
Jacque Hill	<u>3</u>	<u>J</u>	
Judge Clark	<u>4</u>	<u>J</u>	<u>I</u>
John Poindexter			
Staff Secretary			
Sit Room			

I-Information
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ID 8207841

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RECEIVED 08 NOV 82 17

TO CLARK

FROM MARTIN *9/4/85 CDB*

DOCDATE 08 NOV 82

KEYWORDS: INTL FINANCE  
USSR

ECONOMICS

SUBJECT: SOVIET BLOC ECONOMIC & FINANCIAL SITUATION UPDATE 42

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ACTION: FOR INFORMATION

DUE:

STATUS IX FILES

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COMMENTS

REF#

LOG # *8200342*

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169286	MEMO  W. MARTIN TO W. CLARK: SOVIET BLOC ECONOMIC AND FINANCIAL UPDATE #43	2	12/10/1982	B1

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**Freedom of Information Act - [5 U.S.C. 552(b)]**

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82 DEC 10 P 6: 28

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John Poindexter	<u>1</u>	<u>X</u>	<u>I</u>
Bud McFarlane	<u>2</u>	RCM HAS SEEN	
Jacque Hill	<u>3</u>	<u>J</u>	
Judge Clark	<u>4</u>	<u>✓</u>	<u>I</u>
John Poindexter			
Staff Secretary			
Sit Room			

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