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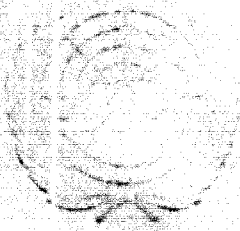
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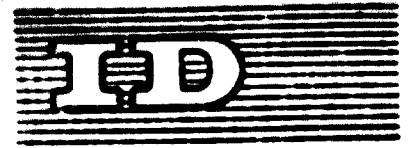
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20 August 1950
Office of the Director of Security

Office of the Director of Security

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United Nations Industrial Development Organization

Distribution
LIMITED

ID/WG.13/5 SUMMARY*
30 July 1968

ORIGINAL: ENGLISH

The Seminar on the Establishment and Development
of the Automotive Industry in Developing Countries
Karlovy Vary, CSSR, 14 October - 1 November 1968

THE AUTOMOTIVE INDUSTRY:
THE PROBLEMS OF INTEGRATION, SPECIALIZATION
AND INTERREGIONAL CO-OPERATION^{1/}

by

Tadamasa Yoshiki
Vice-President
Society of Automotive Engineers,
Japan

SUMMARY

1. In this paper, the problems of integration and specialization in the automotive industry are presented with reference to the experience gained in the Japanese, European and United States automotive industries.
2. The main activities of an automobile manufacturer and the present-day methods used in the automotive industry, including modern design features, are enumerated.

* This is a summary of a paper issued under the same title as ID/WG.13/5.

^{1/} The views and opinions expressed in this paper are those of the author and do not necessarily reflect the views of the secretariat of UNIDO.

3. The type of work encountered in the automotive industry is suitable to developing countries; however, developing countries must avoid the faults of the European and Japanese automotive industry and should produce, by means of subregional co-operation, a multipurpose vehicle on a large scale. Co-operating countries should specialize according to the raw materials available in the country. Some countries well supplied with skilled labour could specialize in producing the bodies of sports cars.
4. The automobile industry should be established by the governments with financial assistance from United Nations organizations.
5. Developing countries should not hesitate to purchase entire second-hand plants and old-type machines. They should also make the necessary know-how available in their own countries by hiring experts from developed countries. The Japanese obtained good results in this way when they were establishing their own automotive industry thirty years ago.
6. Emphasis should be placed on the technical education of the population. Education in maintenance and repair should be considered of particular importance.
7. The automotive parts industry should be committed to rigid standards of quality and must be developed along with the automotive industry itself. Standardisation of parts and nomenclature is of great importance.

CONTENTS

	<u>Page</u>
Introduction	5
THE PROBLEMS OF THE WORLD ECONOMY IN THE PRESENT PERIOD	7
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	7
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	9
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	11
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	12
INTERNATIONAL ECONOMIC AND FINANCIAL CO-OPERATION	14
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	17
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	18
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	21
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	23
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	25
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	27
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	28
THE ECONOMIC SITUATION IN THE PRESENT PERIOD	30

Introduction

The automotive industry in present days owes most of its development to the technical progress of America and Europe. The European automotive industry is competing technologically and financially with the United States. In the developing countries, where the technological level of the automotive industry consists of the assembly of imported parts from the most advanced nations, starting this industry as a mass-production sector involves various complex elements, since the automotive industry is really a combination of industries. It is a joint co-operation in the automotive industry and the problems associated with it are treated in this paper on the basis of these fundamental considerations.

INDUSTRIAL DEVELOPMENT IN JAPAN

12. It is not an easy task to start an automotive industry in any country or region. The motor and non-motorable industries came into being in the United States and in Europe, where they are the most advanced, & spread into their industry with little or no delay. The know-how of the automobile was the result of the hard work of that time, great skill and technique were acquired in building the automobile, (as well as the crank, pump, on the example of Lister, Daimler, etc.) The horse was later replaced by the steam engine, then by the electric motor, and finally by the internal combustion engine. As a result of the latter invention, the automobile, as we know it today, came into being.

13. The development of petroleum, electrical, electronic systems, and internal ignition systems, and the plastic and rubber must be overlooked as major contributing factors in the development of the automobile. Much more developed the production of the equipment, components, accessories and over 10,000 pieces of hardware that go into the construction of an automobile also had to keep pace. It can be said that the ease or difficulty in establishing an automotive industry in any given region or country will be predicted according to the level of the industrial development.

14. In 1912 the automobile industry was first established in Japan by the Nissan Motor Works, Ltd. The founder, Dr. G. Kawasaki, copied the design of the present Ford Model T. He believed the automotive industry could be done. The author pointed out that there would be difficulties to encounter at the start, but in the end the industry would prosper.

15. Mr. Kawasaki brought from the United States the entire old plant of Graham Paige, closed as a result of the Depression. It included all types of conveyors, forging machines, presses, a Holt's engine, machine tools, die blocks and iron sheet and other metals. Five highly qualified engineers from the United States were invited to offer technical know-how and the operation consequently started in the late 1910s. In the beginning, components were produced for internal motors but later the company turned to mass production of the motor. Today, at a capacity of 1,200 vehicles per month, items such as paint, body, radiators, wire rims and propeller shafts were manufactured at the plant, but carburetors, tires, suspension, electrical equipment, windshield glass, seats etc.

were ordered from suppliers. Since all orders had to conform to J.A.S. (Society of Automotive Engineers) specifications which were well known in Japan, the suppliers had a difficult time. They could not, of course, demand more money for their work, and they had to accept the fact that they were being asked to produce more than they were capable of doing.

6. The Japanese automobile industry is almost entirely dependent on the American mass-production system. The plant is similar to that of the American type, but when considered with respect to process control, it is clear that such plants do not compare to the automobile industry. The plant is a very good one of the most recent American production plants.

7. Capital and technology are the two essential elements available in automobile industry anywhere. These factors will be discussed in detail in this report, but at this point, the main purpose of this report is to describe the manufacturing process. This is the construction of the engine, transmission, and chassis, and the putting together of the parts and components ordered from suppliers. The assembly of "chassis" (powertrain) is performed in a separate plant on the body of the automobile is undertaken by special manufacturers. This division of work is a function of the complexity of the automobile. The chassis plants have their body shops close to the assembly line. In general, the chassis is supplied by specialized manufacturers such as engine, transmission, and chassis, and electric equipment such as air conditioning, radio and air filters.

8. The present-day automobile manufacturing plants are becoming more complex in character. These plants produce and assemble more than 10,000 different models and approximately 1,000 different types in order to turn out complete vehicles. The plants are generally divided as follows:

- (a) Manufacturing division where engine, transmission, power transmission parts and chassis are constructed;
- (b) Assembly division where vehicles are assembled or mounted;
- (c) Maintenance division where operating policy is observed, inspections and diagnostic tests are carried out, and research and development, cost analysis and accounting are undertaken;
- (d) Supply division or plant where machine tools, dies, fixtures and other materials are prepared.

9. The personnel requirements for the above divisions vary from a small factory with a daily production of one car, to large plants producing 100,000 or more cars daily. This data is based on figures in those countries of Europe.

... which annual production ranged from 200,000 to 1,500,000 units. The annual production is dependent on the size of the installation (average 2000 units) and the rate of wear of the tooling. Annual revenue, annual sales, annual profit and the volume of work are also dependent on the size of the installation. The volume of work is also dependent on the size of the installation. The volume of work is also dependent on the size of the installation. The volume of work is also dependent on the size of the installation.

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... there are many important forgings being used as component parts in the automobile. In today's forging shops, hot forging is practically obsolete, being replaced by the drop forging machine, the hammer, or the forging roll. The design and machining of the steel, the chemical composition and heat treatment of the steel, the ability to forge the blank steel, and the forging temperature are all very important. The steel must be of forged quality and the forging must be of forged quality.

irregularity on the processed surface. Care must be taken in controlling the temperature during the operation of grinding disks. Since varying degrees of laws techniques, consistency laws evidence with irregularities should be sought.

12. The same care must be taken in the choice of the material for the stamping process. Materials which enter in the choice of the automobile body mainly are the aluminum and bodying operations. The standard for the construction of a car body, where sheet metal is used for the floor, body, doors and roof, the density, properties of the sheet metal must be uniform. For the uniformity of the chemical composition are not sufficient. Special techniques, particularly the pre-treatment of the sheet metal to obtain an uniform condition and uniformity are required. Because the physical properties of the metal tend to change with the working of time, it is essential to have a uniform condition. The sheet metal is processed through a rolling mill. This technique of metal forming used by automobile body construction of the automobile depends primarily on sheet metal and its condition.

13. Sheet metal used in the automobile body will be broken in grain, size and thickness, making it difficult to use sheet metal processed using the old technique requires when working to ensure uniform quality. In the die-block process, the quality of the sheet metal must be adjusted accordingly. It is necessary to have covered some of the process in continuous operation. Processing by hand can also be understood if this is more convenient.

14. The making of a wheel is important since it plays a decisive role in driving, steering and the handling. Making a modified die or other type standards in the long run. A plant with a well-designed tool and die can produce good quality automobiles with a fine finish which may boost the sales of the product.

15. The machine shop is an alternative feature in today's automobile plant. The cylinder block line coming from the foundry is run automatically by means of a transfer machine. The use of a transfer machine is increasing in the industry. However, for production of a small number of parts it is not a necessity. A unique characteristic of an automobile plant is the large array of special machines carrying each process and part individually. Such single-purpose machines are used to produce overhauling, carburetor, connecting rods and so forth. The manufacture of these components are checked with 100% (hand) accuracy. The use of universal and multi-purpose machines and gears is impractical in the shop. The limit between these uniformity, interchangeability of products and lowered costs in the industry.

The first of these systems comprises the mass-production system, introduced for the first time in the automobile industry by Henry Ford in 1910. It is also characterized by the use of a similar system has employed prior to 1910 in the automobile industry. The system consists of a series of machines, each performing a definite operation, in the sequence of steps which constitute the manufacture of the automobile. The system is characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined. The system is also characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined. The system is also characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined. The system is also characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined.

The second of these systems is the job-shop system, which is characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined. The system is also characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined. The system is also characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined. The system is also characterized by the fact that the work is done in a regular order, and that the sequence of operations is predetermined.

After each operation, products may be inspected, because there is the possibility of producing defective items which have to be rejected. Therefore, the inspection unit should not be subordinate to the production manager; inspection should be an independent operation in the plant. Final inspection of all the completed cars must be made, and the test engine performance of the product should be uniform standards, which is usually not achieved in the factory. There should be tests available for this latter purpose. It is customary to conduct driving systems for tests of vehicles selected at random in the automobile directed to the factory or on a cross-country road.

19. A laboratory serving as a clinic for trouble-shooting in routine work, and a separate research laboratory for future innovations and development must be established. The latter, sometimes called the technical centre, demands the best equipment, installation and highly qualified personnel, since it plays an important role in deciding the future of the plant.

20. This office has outlined the general requirements of automobile manufacturing plants but does not deal with the design of different types of cars. The design considerations in relation to engine, chassis, body and machinery are important. The latter can be studied with available money, but labour is not that simple to obtain. It is also necessary to consider the type of equipment and systems introduced into developed countries with considerable experience and know-how. Since recent plants are equipped mainly with the latest machines, the design workers may be required or trained. The detailed design work is done in this manner. The success of the enterprise depends on it.

Requirements for the Automobile Industry

21. The materials used in automobile manufacturing appear to be primarily made of iron and steel, and it is therefore closely related to the iron and steel industry. It is closely related to the iron and steel industry, however, sheet metal, copper, brass, zinc, lead, tin, nickel, aluminium, glass, rubber, etc. The various parts of the engine, chassis, body, etc. are made of various materials, such as cast iron, steel, copper, brass and aluminium. The engine, chassis and body, etc. are made of various materials, such as cast iron, steel, copper, brass and aluminium. The engine, chassis and body, etc. are made of various materials, such as cast iron, steel, copper, brass and aluminium.

22. The automotive industry is a complex of many industries serving a large composite unit. It is closely related to the iron and steel, light alloys, copper alloys, glass, rubber and plastic industries for the construction, and to the various die casting and rolling industries for the construction of parts. Industries producing wires, bearings, pulleys, blades and other parts, and all kinds of hardware, cooperatives, etc. are also important. The automotive industry is a complex of many industries serving a large composite unit. It is closely related to the iron and steel, light alloys, copper alloys, glass, rubber and plastic industries for the construction, and to the various die casting and rolling industries for the construction of parts. Industries producing wires, bearings, pulleys, blades and other parts, and all kinds of hardware, cooperatives, etc. are also important.

The first part of the document discusses the general principles of the proposed legislation. It outlines the objectives and the scope of the bill, which is intended to address the issues raised in the previous report. The document then proceeds to a detailed analysis of the various provisions of the bill, examining their impact on different sectors of the economy and on the general public. The analysis is based on a thorough review of the available data and on consultations with experts in the field. The document concludes with a series of recommendations for the government, based on the findings of the analysis. These recommendations are intended to guide the government in its decision-making process and to ensure that the proposed legislation is implemented in a way that is consistent with the government's policy objectives.

In addition, the document also discusses the need for a comprehensive review of the existing regulatory framework. It argues that the current regulations are outdated and do not take account of the latest developments in technology and in the economy. The document recommends that the government should establish a committee to conduct such a review. The committee should be composed of representatives from the government, the private sector, and academia. The committee's task would be to identify areas where the regulations are outdated or where new regulations are needed. The document also discusses the need for a more coordinated approach to regulation. It argues that the different regulatory agencies should work together more closely to avoid duplication of effort and to ensure that the regulations are consistent with each other. The document concludes by emphasizing the importance of the government's role in ensuring that the economy is regulated in a way that is consistent with the public interest.

The first part of the report deals with the general situation in the country. It is noted that the economy is in a state of stagnation and that the government is unable to meet its obligations.

The second part of the report discusses the political situation. It is noted that the government is corrupt and that the people are dissatisfied with the current leadership.

The third part of the report deals with the social situation. It is noted that the population is suffering from poverty and that there is a high level of unemployment.

The fourth part of the report discusses the military situation. It is noted that the military is weak and that there is a risk of a coup d'etat.

The fifth part of the report deals with the foreign relations of the country. It is noted that the country is isolated and that it has few friends in the international community.

The sixth part of the report discusses the future prospects of the country. It is noted that the situation is bleak and that there is a need for fundamental reforms.

The seventh part of the report deals with the recommendations of the author. It is noted that the author believes that the only way to save the country is through a complete overhaul of the government and the economy.

31. Interpretation and conclusions. It is concluded that the country is in a state of crisis and that the government is unable to meet its obligations.

Interpretation of the situation. It is noted that the country is in a state of crisis and that the government is unable to meet its obligations.

10/10/51
Page 3

The following is a summary of the information received from the various sources regarding the activities of the [redacted] in the [redacted] area during the period from [redacted] to [redacted].

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14. The plan encourages a certain number of business units only and another country only paragraph and, but not only in various conditions in development countries planning an expansion in terms of a million units. If the plan is to be established under the leadership of the local government, it will be to incorporate such, but will be under the leadership and control of the local government, but at the beginning, it is recommended that an advisory committee be set up to advise the local government.

15. The plan also encourages a certain number of business units only and another country only paragraph and, but not only in various conditions in development countries planning an expansion in terms of a million units. If the plan is to be established under the leadership of the local government, it will be to incorporate such, but will be under the leadership and control of the local government, but at the beginning, it is recommended that an advisory committee be set up to advise the local government.

16. The plan also encourages a certain number of business units only and another country only paragraph and, but not only in various conditions in development countries planning an expansion in terms of a million units. If the plan is to be established under the leadership of the local government, it will be to incorporate such, but will be under the leadership and control of the local government, but at the beginning, it is recommended that an advisory committee be set up to advise the local government.

17. The plan also encourages a certain number of business units only and another country only paragraph and, but not only in various conditions in development countries planning an expansion in terms of a million units. If the plan is to be established under the leadership of the local government, it will be to incorporate such, but will be under the leadership and control of the local government, but at the beginning, it is recommended that an advisory committee be set up to advise the local government.

18. The plan also encourages a certain number of business units only and another country only paragraph and, but not only in various conditions in development countries planning an expansion in terms of a million units. If the plan is to be established under the leadership of the local government, it will be to incorporate such, but will be under the leadership and control of the local government, but at the beginning, it is recommended that an advisory committee be set up to advise the local government.

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Page 39

10. The flow of foreign capital from the beginning phase also is various problems, among them the fact that foreign sources will furnish the local financial picture and conduct the capital investments. A possible solution might be a showing of capital investments by donors and local interests. The agreement would be an asset about and a maintenance organization of long-term for the donors the financing can continue to be the direct management of the local and donors. This would be discussed the effectiveness of the investment made by such a financial part of profit as considered by the donors. In conclusion, however, that this type of investment should be made by the donor and should be in financial situations themselves to be made more than in other parts of the world.

11. There are many international organizations that aid to countries in the underdeveloped areas. These are not always successful and may aid in the form of a gift or a loan. Gift projects are of value, there is a financial barrier which means where to make any donation. This is not always appropriate and may be a country which receives a gift of a building or a school. In the case of this gift and this could lead to financial difficulties. There are other types of international organizations which, for example, have, as a result of the Second World War, could supply some of the financial resources in the form of well equipped or plant, technical skills, and training.

12. In obtaining a loan, the ability of countries to borrow is becoming smaller. The loan are often repaid with interest, which is a financial barrier. Some of these are planned economies, but it is not necessary that they are such. It is recommended that there are capital for donor's agencies of the United Nations and in the World Bank, the International Finance Corporation, the United States Agency for International Development (USAID), the World Health Organization, and the World Food Programme. The settlement of these organizations and the international agencies are the same. The search of the situation in order to a financial institution. The ability of financial facility should be extended through the local banks in the world could be able through the extent of local products and the ability of the facility.

13. Besides the size of the capital, the local production of about 10 units on the factories that supply the parts, a minimum daily production of about 10 units should be considered as a subject in other words, 10,000 units per year

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Page 2

27. Assuming that an automobile plant is to be established in the country, it is necessary to consider the various factors which are likely to influence the success of the venture. These factors include the availability of raw materials, the skill of the labour force, the efficiency of the management, and the quality of the products. It is also necessary to consider the financial resources available for the plant, and the market for the products. The success of the plant will depend on the ability to secure these factors in a timely and efficient manner.

28. The first factor to consider is the availability of raw materials. It is essential to ensure that the plant has access to a reliable and cost-effective source of raw materials. This may involve establishing relationships with suppliers, or investing in the extraction and processing of raw materials. The quality of the raw materials is also important, as it will affect the quality of the products. It is also necessary to consider the transportation costs of raw materials, and the impact of fluctuations in prices.

29. The second factor to consider is the skill of the labour force. It is essential to ensure that the plant has access to a skilled and motivated workforce. This may involve investing in training and development, or recruiting experienced workers from other countries. The quality of the labour force is also important, as it will affect the efficiency of the plant. It is also necessary to consider the costs of labour, and the impact of fluctuations in wages.

30. The third factor to consider is the efficiency of the management. It is essential to ensure that the plant is managed in a timely and efficient manner. This may involve investing in management training, or recruiting experienced managers from other countries. The quality of the management is also important, as it will affect the success of the plant. It is also necessary to consider the costs of management, and the impact of fluctuations in salaries.

31. The fourth factor to consider is the quality of the products. It is essential to ensure that the products are of a high quality, and meet the requirements of the market. This may involve investing in research and development, or recruiting experienced engineers and designers. The quality of the products is also important, as it will affect the marketability of the products. It is also necessary to consider the costs of production, and the impact of fluctuations in prices.

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The first part of the document is a letter from the Secretary of the State of New York to the Governor, dated December 13, 1955. The letter discusses the proposed amendments to the State Constitution, particularly those relating to the structure of the Executive and Judicial Branches. It notes that the amendments have been approved by the people in a referendum and are now being presented to the Governor for his signature.

The second part of the document is a letter from the Governor to the Secretary of State, dated December 14, 1955. The Governor expresses his approval of the proposed amendments and his intention to sign them. He also mentions that he has received the necessary advice from the Attorney General regarding the legal aspects of the amendments.

The third part of the document is a letter from the Secretary of State to the Governor, dated December 15, 1955. The Secretary informs the Governor that the proposed amendments have been printed and are ready for distribution to the public. He also mentions that the necessary steps have been taken to ensure that the amendments are properly recorded in the State Constitution.

The fourth part of the document is a letter from the Governor to the Secretary of State, dated December 16, 1955. The Governor expresses his satisfaction with the process and his confidence in the Secretary's handling of the amendments. He also mentions that he has received the necessary advice from the Attorney General regarding the legal aspects of the amendments.

The fifth part of the document is a letter from the Secretary of State to the Governor, dated December 17, 1955. The Secretary informs the Governor that the proposed amendments have been printed and are ready for distribution to the public. He also mentions that the necessary steps have been taken to ensure that the amendments are properly recorded in the State Constitution.

The sixth part of the document is a letter from the Governor to the Secretary of State, dated December 18, 1955. The Governor expresses his satisfaction with the process and his confidence in the Secretary's handling of the amendments. He also mentions that he has received the necessary advice from the Attorney General regarding the legal aspects of the amendments.

The seventh part of the document is a letter from the Secretary of State to the Governor, dated December 19, 1955. The Secretary informs the Governor that the proposed amendments have been printed and are ready for distribution to the public. He also mentions that the necessary steps have been taken to ensure that the amendments are properly recorded in the State Constitution.

The eighth part of the document is a letter from the Governor to the Secretary of State, dated December 20, 1955. The Governor expresses his satisfaction with the process and his confidence in the Secretary's handling of the amendments. He also mentions that he has received the necessary advice from the Attorney General regarding the legal aspects of the amendments.

The ninth part of the document is a letter from the Secretary of State to the Governor, dated December 21, 1955. The Secretary informs the Governor that the proposed amendments have been printed and are ready for distribution to the public. He also mentions that the necessary steps have been taken to ensure that the amendments are properly recorded in the State Constitution.

The tenth part of the document is a letter from the Governor to the Secretary of State, dated December 22, 1955. The Governor expresses his satisfaction with the process and his confidence in the Secretary's handling of the amendments. He also mentions that he has received the necessary advice from the Attorney General regarding the legal aspects of the amendments.

[The page contains several paragraphs of text that are extremely faint and illegible due to the quality of the scan. The text appears to be a formal document or report.]

SECRET

1. The first part of the document discusses the general situation of the country and the role of the government.

2. It then goes on to describe the economic conditions and the impact of the war on the population.

3. The document also mentions the political situation and the role of the various parties.

4. In the following section, the author discusses the social conditions and the role of the church.

5. The document concludes with a summary of the main points and a call for action.

6. The author also mentions the role of the press and the importance of education.

7. The document is a detailed and comprehensive report on the current situation of the country.

8. It provides a clear and concise overview of the various aspects of the country's life.

9. The author's analysis is thorough and well-researched, providing valuable insights into the country's future.

10. The document is a must-read for anyone interested in the current affairs of the country.

11. It is a well-written and informative report that provides a clear and concise overview of the country's situation.

12. The document is a valuable resource for anyone who wants to understand the current situation of the country.

13. It is a well-written and informative report that provides a clear and concise overview of the country's situation.

14. The document is a valuable resource for anyone who wants to understand the current situation of the country.

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17. It is a well-written and informative report that provides a clear and concise overview of the country's situation.

18. The document is a valuable resource for anyone who wants to understand the current situation of the country.

[The body of the document contains several paragraphs of text that are extremely faint and illegible due to the quality of the scan. The text appears to be a formal report or letter, but the specific content cannot be discerned.]

... For example, a measurement given as 11.55 on a scale not indicating whether or not it is made with machine tools based on a factor in the United States, or from machine tools based on the metric system. The same problem in standardizing is the definition of a physical constant of nature. There is much uncertainty and disagreement in Europe with the uncertainty of academic specifications of these and other basic units. The only way to get on the same wavelength is to provide for the benefit of all concerned, the necessary requirements of physical constants and units, and specifications of the same in a way that is clear and unambiguous to all concerned. This is the only way to avoid the confusion and uncertainty that now exists.

It is not a simple matter to establish a common standard for all countries. However, it is possible to establish a common standard for all countries by the use of machine tools based on a factor in the United States, or from machine tools based on the metric system. The same problem in standardizing is the definition of a physical constant of nature. There is much uncertainty and disagreement in Europe with the uncertainty of academic specifications of these and other basic units. The only way to get on the same wavelength is to provide for the benefit of all concerned, the necessary requirements of physical constants and units, and specifications of the same in a way that is clear and unambiguous to all concerned. This is the only way to avoid the confusion and uncertainty that now exists.

The standard of such an organization for the developing countries, the American Association of Economic Development, should be such as to provide for the benefit of all concerned, the necessary requirements of physical constants and units, and specifications of the same in a way that is clear and unambiguous to all concerned. This is the only way to avoid the confusion and uncertainty that now exists.

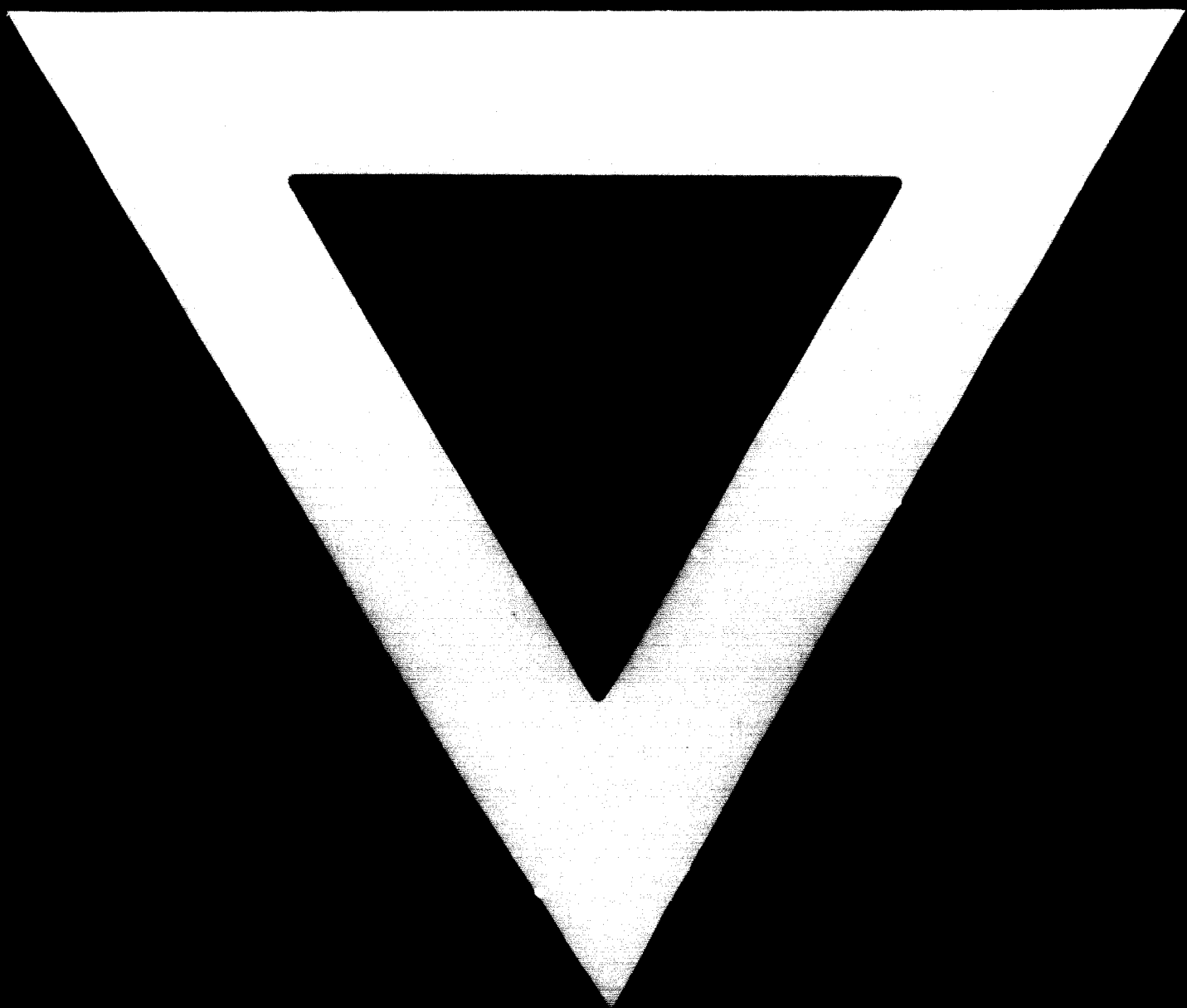
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We regret that some of the pages in the microfiche copy of this report may not be up to the proper legibility standards, even though the best possible copy was used for preparing the master fiche.



12.7.74