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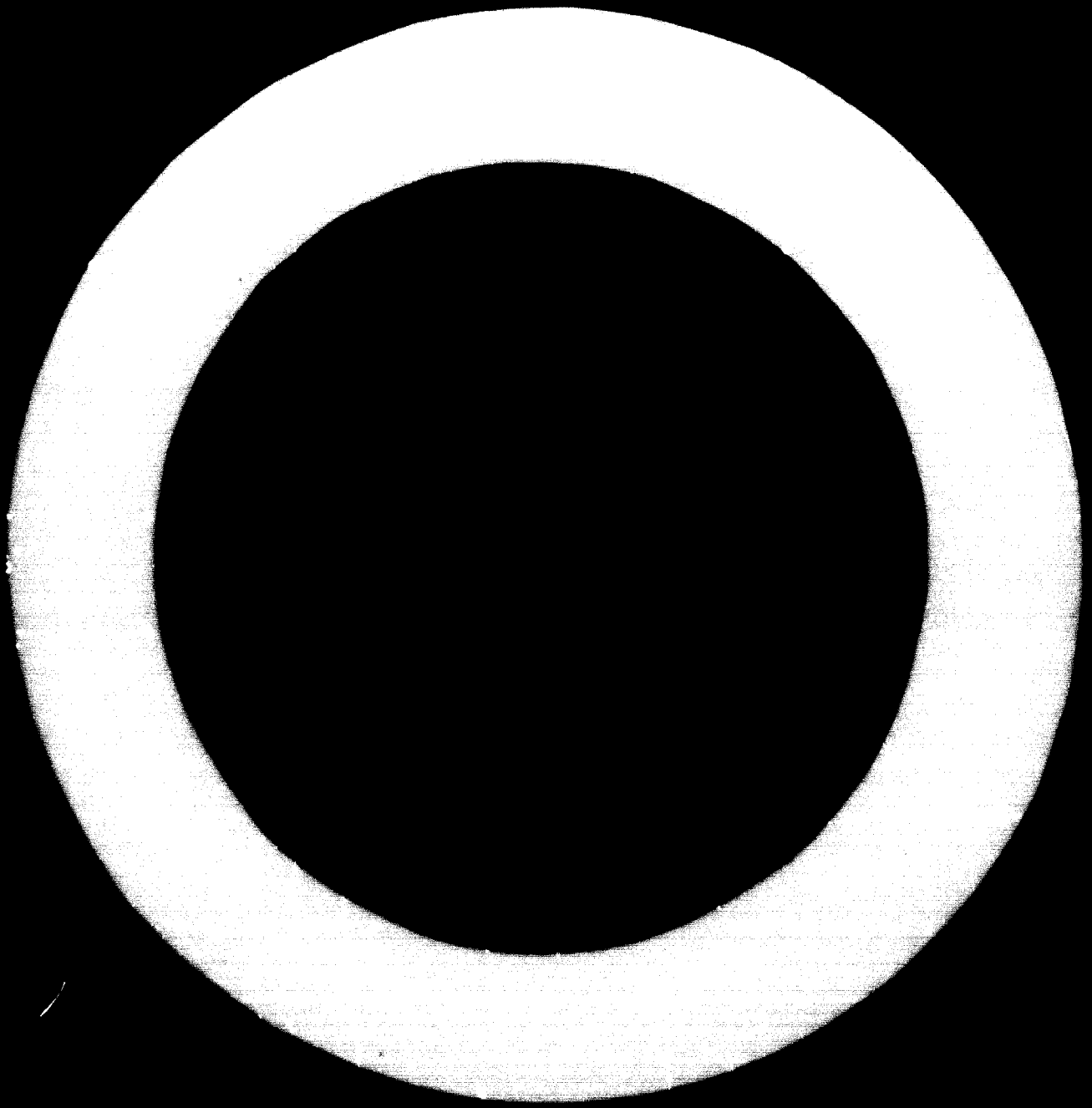
UNIDO TECHNICAL ASSISTANCE TO THE LEAST DEVELOPED
AMONG THE DEVELOPING COUNTRIES IN THE FIELD
OF INDUSTRIAL POLICIES AND PROGRAMMING

prepared by

the Secretariat of UNIDO

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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.



1. The following paragraphs review UNIDO technical assistance in the field of industrial policies and programming devised to help the least developed among the developing countries. This technical assistance covers the following major areas:

- Industrial Programming and Project Plannings
- Industrial Policies and Financing
- Promotion of Export-oriented Industries
- Industrial Surveys

Industrial Programming and Project Planning

2. In the field of Industrial Programming and Project Planning, UNIDO is concentrating its activities on assisting developing countries to arrive at appropriate industrial development strategies and to formulate and implement industrial development plans and programmes. Thus, UNIDO experts are assisting Mali in the elaboration of its Industrial Development Plan and will assist during 1972 and 1973, Tanzania in formulating her Industrial Strategy.

3. While continuing to render assistance in the planning of the overall industrial development of the developing countries, UNIDO places more emphasis on the preparation, evaluation and implementation of industrial projects through which industrialization becomes a reality. In 1972 two least developed countries namely Guinea and Upper Volta will be assisted by UNIDO experts in the preparation and evaluation of their industrial projects.

4. In order to make technical assistance more efficient, increasing weight is given to supporting activities that are directly related to field operations, e.g. advisory missions, training workshops, the preparation of respective supporting studies and direct substantive servicing of field operations. In 1971 one African least developed country, Ethiopia, was advised by a UNIDO senior industrial adviser in industrial planning and

programming, who will continue in 1972 to advise the Ethiopian Government. Another African least developed country, Sudan, was visited in 1971 by a UNIDO Advisory Mission on project implementation.

5. Between 1971 and 1973, a total of fourteen of the least developed among the developing countries will have derived direct benefits from the various activities of UNIDO in this field. These activities include besides those mentioned above: assistance in the establishment of Industrial Studies and Development Centres (Industrial Studies and Development Centre in Tanzania; Central Techno-economic Unit within the Ethiopian Development Corporation; Industrial Studies Centre in Guinea) and fellowships for officers from least developed countries for project preparation and evaluation, project planning, project programming, industrial planning and programming. Annex I lists the various forms of technical assistance given by UNIDO to these fourteen least developed countries.

Industrial Policies and Financing

6. In this area the major aim of UNIDO is to assist requesting governments in achieving their industrial objectives and targets. This assistance consists of an evaluation of the effectiveness of existing policy instruments and measures of suggestions for additional or modified measures that might better achieve the stated objectives.

7. Some of the least developed among the developing countries have requested from UNIDO a review of the entire set of policies used to implement their industrial development programme. In 1971, for example, an Industrial Planning and Advisory Mission went to Nepal within such a framework. Other requests have concentrated on the measures and instruments aimed at achieving such specific objectives as investment promotion (Afghanistan), reorganization of development bank operations (Somalia), and assistance to industrial development bank on industrial credit, financial analysis and banking operations (Yemen).

8. In total, six least developed among the developing countries have obtained or are obtaining assistance from UNIDO within the framework of this programme. These countries are listed in the Annex II.

Promotion of Export-oriented Industries

9. Through its Programme of Product Adaption and Development, UNIDO is striving to establish channels of communications between producers in developing countries and potential buyers in developed countries. Through such channels, the producer is made aware of quality standards and other measures that have to be met if his products are to be accepted in the markets of the developed countries.

10. The role of UNIDO is to identify suitable partners on both sides, to select the types of products that the developing countries concerned might possibly export, and to arrange for the contacts between partners. Through consultations, necessary product and legal changes may be identified and acted upon so that actual sales negotiations may then be initiated.

11. UNIDO began work in this field in three of the least developed among the developing countries: Afghanistan, Sudan and Tanzania.

Industrial Surveys

12. UNIDO is performing industrial surveys for the direct benefit of developing countries including the least developed among them. Training is an important aspect of survey assistance and is aimed at enabling the recipient countries to perform their own industrial surveys in the future.

13. Training programmes are carried out by UNIDO to establish appropriate competence in survey techniques among the personnel in developing countries, and including the least developed countries. Two training workshops have taken place, one in the United Kingdom with the cooperation of the University of Sussex for English-speaking trainees and the other in Senegal for French-

speaking trainees. Many participants in these two workshops were from the least developed among the developing countries.

14. At a general level, UNIDO publishes an annual Industrial Development Survey which reviews the situation of industrial development, identifies the main problem areas and analysis the main trends in the industrialization process. Each of these annual Surveys contains a special study which concentrates on a major issue common to a number of developing countries. One of these studies deals with some special problems of industrial development in the least developed among the developing countries and will appear in a future volume of the annual survey.

15. At the country level, UNIDO organizes Country Survey Missions to assist the least developed among the developing countries in assessment of their industrial structure, analysis of their potentials and problems, the pinpointing of their investment opportunities and identification of their needs for further technical assistance. An important component of such industrial survey missions to least developed countries is the training of counterparts.

16. Three Industrial Survey Missions have already completed work in some least developed countries (Lesotho, Laos, Botswana). Other Industrial Survey Missions will leave in the next months to three other least developed countries (Surinam, Sierra Leone, Western Samoa)*. The terms of reference for industrial surveys carried out or to be carried out by these missions are drafted in a way which respond to the main problems and requirements of each country, taking into account its requests and reflecting its special situation.

* These six missions are a portion of the twenty survey missions that have been implemented to UNIDO.

17. The terms of reference of the Industrial Survey Mission to Botswana, for example, were as follows:

- i) to prepare a portfolio of industrial projects to be considered for further analysis. Attention was given to investment priorities in this preparation. The Mission had also
- ii) to consider the possibilities for export-oriented industries supplying markets in the neighbouring countries;
- iii) to suggest the regional distribution for proposed projects and advise on means of implementing the identified projects;
- iv) to advise on the training of counterpart personnel in the preparation and implementation of future industrial surveys; and
- v) to explore alternatives for promoting the continuous updating of industrial surveys.

18. The terms of reference of the Industrial Survey Mission to Lesotho were somewhat different. The mission was requested

- to assist the Central Planning Office in the preparation of the industrial aspects of Lesotho's medium term development plan;
- to assist in the forecasting of Lesotho's industrial development for inclusion in the interim plan which will be the basis for financial talks with the United Kingdom;
- and to draft requests for further assistance by UNIDO.

19. Although the objective assigned to the Industrial Survey Mission to Gambia - (a country not however included among the least developed countries) - was also to carry out an industrial survey, the definition of data requirements was put on the top of the mission tasks. The terms of reference of the mission to Gambia were in fact:

- to assist in defining industrial data requirements of the country and in initial preparation of such data;
- to survey the industrial sector of the Gambian economy;
- to assess the country's potential for further industrial development, to identify opportunities of establishing industries based on local national resources and to make appropriate recommendations for a preliminary plan of such industries;
- to advise on further technical assistance; and
- to prepare a report on the survey.

20. It may be worthwhile to summarize for the reader some of the conclusions and recommendations of the Industrial Survey Missions to four least developed countries mentioned above: Botswana, Lesotho, Gambia and Laos.

Botswana

21. Though Botswana is primarily a livestock and agricultural country, there will be in the coming years a growing demand for new jobs which can, to a great extent, only be provided by manufacturing. The expectations of the fast growing population for rising standards of living can only be met by a fast growing industrial sector. The Industrial Survey Mission felt that a long-term strategy is needed which fits in the goals of general economic development and takes into account both the strong economic links with the other Southern African countries and the potential economic co-operation with African countries in the North of Botswana and in Central Africa.

22. In the opinion of the Mission a combination of large, medium and small scale industries is needed. Among the large industries to be considered the Mission mentioned a brewery, a tannery, a chemical complex, a second abattoir, a cement complex, a pulp and paper complex, a textile complex and a clothing factory. These large-scale industries should give the momentum to industrial development. Their establishment should be spread over a long-term period of at least 12 years.

23. This development should be accompanied by an adequate development of medium and small enterprises. Among them, service industries and producers of simple manufactures, often very close to commerce, are most urgently needed. They should be followed by industries using a high amount of domestic inputs (domestic raw materials and labour). The Mission has taken into account that most of domestic raw material resources have still to be developed and that skilled labour is very short. As to the question whether import substitution or export orientation should be given a higher priority, the Mission felt that although the domestic market should not be overlooked, the main thrust of industrialization should aim at export markets. This is

necessitated by the fact that the domestic market is relatively small due to the low average income level of the population.

24. The Mission also recommended that regional distribution of manufacturing enterprises should follow the main road and railway connections from the South to the North of the country, thus making Lobats, Mafikeng and Francistown the main locations of industry in Botswana. In addition Selibi-Pikwe could become a manufacturing centre. Crystallization points could also be established in the North-west with the location of the second abattoir combined with a second tannery and in the North a pulp and paper complex.

25. The Mission recommended also that certain institutional measures be implemented. Restructuring of the Botswana Development Corporation (BDC) seems to be of much importance. Special services for information, public relations and export promotion should be created within BDC's framework and special institution designated to promote small enterprises should be set up. Co-operation between the competent Ministries and BDC should be improved. Licencing and other administrative procedures should be simplified. In order to encourage potential industrial investors, tax concessions should be up-graded and Government purchasing should be rationalized and more used as a means to protect domestic industries. Attractive sites for industrial plants and, if needed, buildings should be made available. Charges for water and electricity for industrial enterprises should be reviewed. Last but not least, more double taxation and investment guarantee agreements with foreign countries should be concluded.

Lesotho

26. It seemed to the UNIDO consultant who visited Lesotho that there are two basic fields where the UNIDO should extend further assistance to the Government of Lesotho namely a) to strengthen Government machinery with respect to the small-scale industries development and promotions and b) to give technical help to the present industrial projects as well as facilitate their expansion on the same or similar lines.

27. With respect to (a) UNIDO worked out recommendations for the establishment of a Small-scale Industries and Tourism Promotion Unit with the suggestion that this Unit should be incorporated into the present Lesotho National Development Corporation.

28. The Promotion Unit Project has been approved by the Government and forwarded to UNIDO with request for providing three posts:

- Director of Small-Scale Industries Unit (SIDA/OPRX)
- Industrial Economist (SIS)
- Industrial Estate Expert (SIS)

29. Of the above, the Industrial Estate Expert is of the highest priority. The priority arises from the state of preparation and selection of an industrial area in Maseru where several industrialists with approved projects would like to commence construction work but the area has not yet been planned, e.g. masterplan, planning of common services, tentative costs etc. The other point is that several prospective areas for the establishment of industrial estates have already been tentatively selected and it is now essential to investigate and examine the suitability of these locations in some detail.

30. The Government of Lesotho intends to establish a Bureau of Standards and Quality Control to serve and embrace agricultural, mining and industrial processing products. The UNIDO consultant recommends that the feasibility of establishing such a project on a regional basis with Swaziland and Botswana be examined. If the regional project appears infeasible he recommends that the Government of Lesotho seek assistance from UNDP for the establishment of the Bureau.

31. With respect to (b) the following projects were recommended for further UNDP technical assistance:

- Wool and Mohair Processing Export (UNIDO-SIS)
- Hides and Skins Improvement and Processing Export (UNIDO-SIS)
- Technical Assistance to the Village Industries Development Organization (ILO)
- Air Craft Company Development Expert (ICAO)

32. The present need for an expert to investigate the raw wool and mohair processing project is based on the eventual possibility of supplying the spinning and weaving establishments with locally processed mohair and wool.

33. With regard to the hides and skins expert, it is felt that such assistance may result in the improvement of the present low quality of local hides and skins as well as the tanning method used in the Basotho Sheep Skin Product Factory. It is also envisaged that there is a potential for the second small-scale tannery preferably as a pilot project and an abattoir.

34. Both projects, the Wool and Mohair Processing Expert and the Hides and Skins Improvement and Processing Expert have already been approved by the Government.

35. There is a great need to expand the present activities of the Village Industries Development Organization. The technical assistance should be sought mainly in such fields as wood carving techniques, etc.

36. The Government of Lesotho has bought the local Aircraft Company in order to overcome the real danger of having it closed down by the private owner. As the air transport is extremely essential to the country and its economic life, it is recommended that further investigations concerning the running and expansion of the company should be done through UNDP and carried out by ICAO technical assistance.

Gambia

37. The Industrial Survey Mission to Gambia was the first of its kind in the country and covered a broad field and problems of great variety.

38. In accordance with the request of the Government, the Industrial Survey Mission assisted in the definition of the industrial data requirements and carried out a preliminary survey of the existing manufacturing industries.

39. There are presently in operation only 19 manufacturing units employing more than 10 workers. There are several more small-scale industries. The total employment of the (non-governmental) manufacturing industries is less than 1000 people, i.e. approximately 0.6 per cent of the economically active population. The annual gross output of the manufacturing sector is slightly more than 4.5 million pounds out of which an estimated 0.3 or 0.4 million pounds is the value added.

40. The manufacturing sector is extremely vulnerable due to the seasonality of demand (purchasing power) which, in turn, is the consequence of the domination of the economy by the Government. The groundnut cycle introduces a cyclical movement through the consequential cyclical movement of the trade to all parts of the economy, including manufacturing industries. Non-seasonal industries are not exceptional either.

41. In fulfilment of its terms of reference the Mission tried to identify opportunities for establishing industries based on local national resources. The availability of industrially utilizable natural resources was examined and it was found that there are valuable natural resources that could be fruitfully used in future industries. However, none of these resources are concentrated, organized and developed well enough to serve immediately as sources of industrial raw material.

42. On the basis of the available resources, the market and projects in progress there seems to be a prima facie case for three major industrial projects that may become viable in the country.

- a) A food-freezing/cold storing/ice making complex to prepare quick freeze and pack seafood for export. In order to lower costs and to give impetus to other sectors, the project was designed to process other items as well, e.g. beef, fruit and vegetables;
- b) A fruit juice and syrup factory to substitute imports, to supply reliable syrup to the public and the bottlers of the popular "mineral waters" and possibly for export;

- c) A wood-working complex to saw timber, make building timber and a variety of inter linked products.

In addition to the above three major industrial projects a number of other industrial potentials of smaller scale and minor importance have also been identified by the Mission.

43. The Mission felt that another condition for the success of industrial development in Gambia is to create the institutional and organizational framework of industrial development. Fundamentally, the following actions seem to be necessary:

- a) The formulation of an industrial development policy; lay the foundations for industrial planning;
- b) The revision of the existing industrial inducements and a gradual introduction of a more selective system of incentives;
- c) A fresh look at the whole question of protection both from the fiscal point of view and from the point of view of the needs of industrial development;
- d) Determined steps to create and safeguard funds specifically ear-marked for industrial development;
- e) A review of the problem of government participation in industrial development (its purpose and modes);
- f) The establishment of an institution (Development Corporation) to promote and help finance industrial development;
- g) The creation of a governmental or advisory post to assist in designing all the above described policies, co-ordinate interrelated plans, supervise the various agencies concerned and work constantly to make sure that the policies are implemented.

Laos

44. Another Industrial Survey Mission comprising four experts spent two months in Laos (December 1970 and January 1971). The main conclusions of the Mission could be summarized as follows: Agriculture is the mainstay of the economy of Laos and some 80 per cent of the population live in rural areas. The incidence of transport cost on economic activity is very high owing to the landlocked position of the country, its geographical configuration, deficient infrastructure and equipment and the present insecurity conditions. Mining is limited to tin and salt. Energy is presently thermally produced from local firewood and charcoal and imported fuel. Approximately half of the electricity consumed is imported from Thailand (local production 28 million kwh in 1968).
45. Three commodities (tin, wood and coffee) make up the bulk of exports, while imports have a very large content of food products and other consumption goods. The trade balance features a heavy deficit (1969 imports US \$ 53,7 millions, exports US \$ 8,8 millions), financed by foreign assistance. The government budget has been steadily deficitary, maintaining strong inflationary pressures.
46. All aspects of the economy are affected by the war situation which isolates the various regions of the country, preempts resources available for development and distorts their allocation.
47. Apart from the production of tin concentrates and wood products for export, existing industries are concentrated in food products, beverages, textiles and repair activities for the local market.
48. The possibilities for industrial development in Laos are very limited, at the present, by a number of factors:
- general economic underdevelopment (lack of capital, low labour skills, weak administrative structure, absence of basic economic information, etc.);
 - landlocked situation and high transport costs;

- small internal market further limited by the extensive subsistence sector and the isolation of the various regions;
- risks and insecurity prevailing on account of the war situation.

49. There is, however, a sizable potential for industrialization in the long run, based mainly on the country's rich natural resources endowment:

- a wide variety of agricultural products (rice, maize, potatoes, cassava, groundnuts, cotton seeds, etc.); extensive forestry resources; livestock and fishery resources;
- a promising mineral potential which includes besides the presently exploited tin and salt mines and known gypsum resources, possible deposits of iron ore, copper, anthracite, lignite and petroleum;
- a huge hydroelectric potential whose exploitation has been initiated.

50. In the medium-term, possibilities of industrialization offered by the following factors should be particularly taken into account:

- import substitution for food products, textiles and construction materials (especially cement included as a priority project in the development plan) as well as foundry products based on scrap;
- establishment of industries in connexion with the integrated development of the Vientiane plain (agricultural implements, fertilizers, pesticides, as well as light consumer goods);
- establishment of energy-intensive industries in relation to the coming into operation of the Nam Ngum dam in 1972 (135,000 kw capacity as compared to existing total capacity of 10,000 kw);
- promotion and improvement of small industries and their orientation towards exportation.

51. The 5-year "framework plan" emphasizes the elimination or reduction of a number of structural imbalances such as the preponderance of the subsistence sector, the underdeveloped state of manufacturing and the continuing budget and trade deficit. Priority is to be given to development and modernization of the agricultural sector. The plan is divided into a "basic" section including 12 major projects and a "general" section encompassing 79 small projects. Three major projects having direct implication for industrial development (hydropower, cement and integrated development of the Vientiane plain) have been mentioned above.

52. Three major agencies and a commission are concerned with the promotion and guidance of industrial development:

- The "Direction de l'Industrie et de l'Artisanat" (Ministry of National Economy) works on regulation, operation and improvement existing industry.
- The "Commissariat Général du Plan" (Ministry of Planning and Co-operation) deals with the establishment of new industries.
- The Development Bank provides long and medium term credit to industrial firms as well as assistance to improve their financial operations.
- The Investment Commission composed of representatives of the above agencies and of the private sector administers the granting of incentives provided under the Investment Code.

53. Industrial fields where assistance from UNIDO and other international organisations could be most helpful are listed below:

- long-term assistance for the study, planning and implementation of the large projects; integrated agro-industrial development of the Vientiane plain, industrial utilization of energy from the Nam Ngum dam;
- technical support of the major agencies dealing with industrial development;
- assistance for the promotion and improvement of small-scale industry.

ANNEX 1 - UNIDO Technical Assistance in Industrial Programming and Project Planning to least developed among the developing countries.

<u>Countries</u>	<u>Project Title and Project Description</u>
<u>AFRICA</u>	
Dahomey	<u>Industrial Training</u> - Projects preparation and evaluation (1/6 m/m fellowships)
Ethiopia	<u>Industrial Planning and Programming</u> - Senior Industrial Adviser (1/12 m/m expert services) Project identification and evaluation (1.6 fellowships) - Forecast: Establishment of Central Techno-economic Unit within the proposed Ethiopian Development Corporation.
Guinea	<u>Industrial Planning and Programming</u> - Industrial planning and programming (1/12 m/m expert services; equipment) - Industrial project evaluation (1/12 m/m expert services) - Assistance in establishment of an industrial studies centre (official request submitted to UNDP)
Lesotho	<u>Industrial Policies and Programming</u> - Project planning (1/12 m/m fellowships)
Mali	<u>Industrial Planning and Programming</u> - Assistance in the elaboration of the industrial development plan (1/36 m/m expert services) - Industrial programming (2/12 m/m fellowships)
Rwanda	<u>Industrial Planning</u> - Industrial planning and programming (1/12 m/m fellowships)
Somalia	<u>Assistance in Industrial Policies Programming and Financing.</u> - Industrial Programming and industrial economist (2/48 expert services; miscellaneous) - Industrial marketing (1/6 m/m expert services)
Sudan	<u>Industrial Policies and Programming</u> - Industrial Planning and programming (1/8 m/m expert services) - Advisory mission on industrial project implementation (3/1.5 m/m expert services) - Industrial programming, project preparation and evaluation (2/12 m/m fellowships)

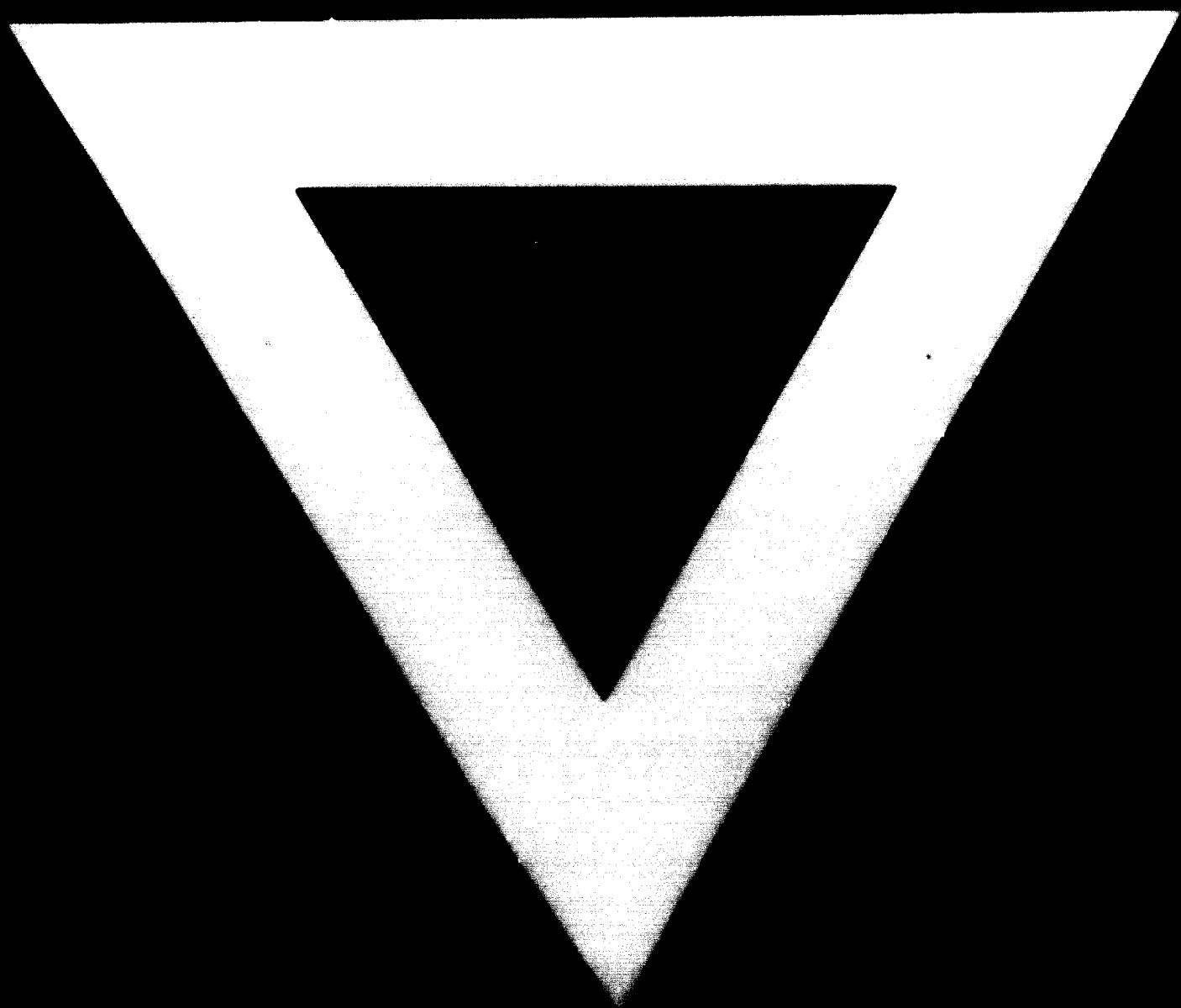
ANNEX 1 (continued)

<u>Countries</u>	<u>Project Title and Project Description</u>
Tanzania	<u>Industrial Planning and Programming</u> - Industrial Studies and Development Centre, Dar-es-Salaam - Industrial strategy formulation
Uganda	<u>Industrial Planning and Programming</u> - Industrial planning and programming (1/24 m/m expert services; 1/6 m/m fellowships)
Upper Volta	<u>Industrial Training</u> - Industrial programming and project planning; preparation and evaluation of projects (1/6 m/m fellowships)
ASIA	
<u>Afghanistan</u>	<u>Planning and Programming</u> - Consultancy services for industrial planning (3/11 m/m expert services) - Industrial programming and project planning (2/24 m/m fellowships) <u>Forecast:</u> - Assistance to the Ministry of Planning (1/23 m/m expert services) - Assistance to the Ministry of Mines and Industries on cost accounting and industrial data processing (2/12 m/m expert services; 2/24 m/m fellowships)
Nepal	<u>Industrial Policies and Programming</u> - Project preparation and evaluation (1/6 m/m fellowships) - Industrial project preparation (2/12 m/m fellowships)
LATIN AMERICA	
<u>Haiti</u>	<u>Training in Industrial Programming</u> - Industrial programming - industrial projects preparation (1/6 m/m fellowships)

ANNEX 11 - UNIDO Technical Assistance in Industrial Policies and Financing to least developed among the developing countries.

<u>Countries</u>	<u>Project Title and Project Description</u>
<u>AFRICA</u> <u>Niger</u>	<u>Industrial Promotion</u> - Industrial promotion (1/29 m/m expert services) - Investment for specific industry projects (1/1 m/m expert services)
<u>Somalia</u>	<u>Assistance in industrial policies, programming and financing.</u> - Reorganization of development bank operations (1/12 m/m expert services) - Establishment and organization of Somalian Industrial Development Corporation (2/9 m/m expert services)
<u>Upper Volta</u>	<u>Identification of new industrial opportunities</u> - Assistance in the identification and preparation of industrial projects (1/1 m/m expert services)
<u>ASIA</u> <u>Afghanistan</u>	<u>Planning and Programming</u> - Investment promotion (2/18 m/m fellowships) <u>Forecast:</u> - Assistance to Industrial Development Bank on industrial credit, financial analysis and banking operations (3/36 m/m expert services; 3/18 m/m fellowships)
<u>Nepal</u>	<u>Industrial Policies and Programming</u> - Industrial Planning and Advisory Mission (4/56 m/m expert services; 1/12 m/m fellowships) - Assistance in Selection and Preparation of Industrial Projects (2/1 m/m expert services)
<u>MIDDLE EAST</u> <u>Yemen Arab Republic</u>	<u>Assistance in industrial financing</u> - Industrial policies and financing project financing (2/12 m/m fellowships)





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