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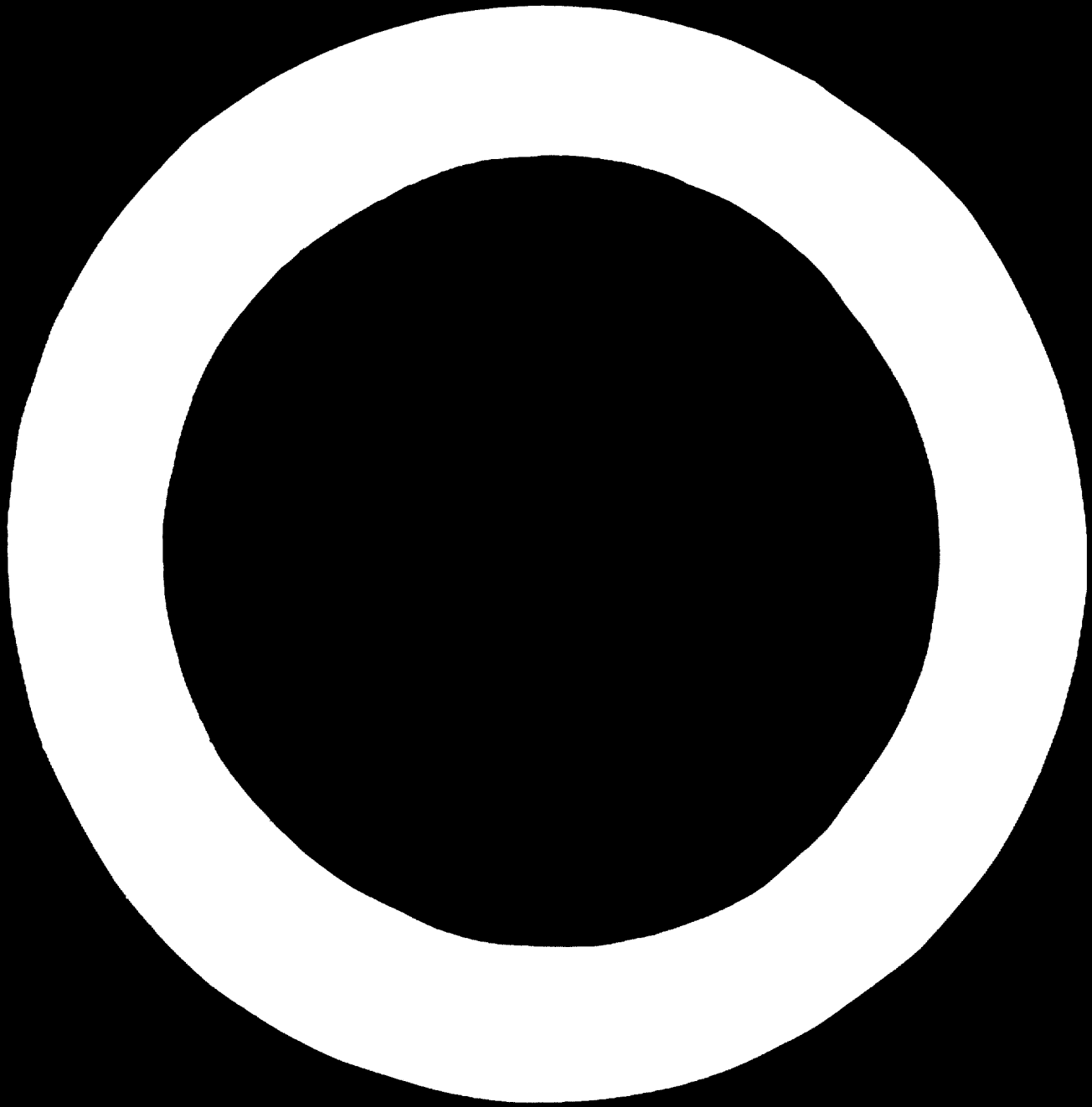
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# UNIDO's Industrial Survey Mission Programme

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**I**N 1968, in accordance with the recommendations of the International Symposium on Industrial Development and after a broad review of the assistance requirements of developing countries, UNIDO launched a new technical assistance activity - the Industrial Survey Mission Programme. Financed from the Special Industrial Services (SIS) fund, this activity aims at assisting the developing countries, as well as regional groupings and institutions, to conduct industrial surveys. [Industrial survey assistance can be obtained from UNIDO upon presentation of an official request by the Government through the local resident representative of the United Nations Development Programme (UNDP)].

The industrial survey programme has evoked a highly favourable response. To date, twenty developing countries and three regional organizations have officially requested survey assistance, while several new requests are expected to result from inquiries from other countries. Industrial surveys sponsored by UNIDO have been successfully implemented in Ecuador, The Gambia, Kenya and Lesotho; another project is nearing completion in Swaziland; and field work is scheduled to be initiated in six additional countries before the end of 1970. At the regional level, industrial survey assistance is presently being provided to the East African Community, the East African Development Bank and the Industrial Development Centre for the Arab States. In 1968, UNIDO survey experts participated in two subregional programming missions in East and West Africa organized jointly by the United Nations Centre for Development Planning, Projections and Policies and the Economic Commission for Africa.

## Motivations for industrial survey assistance requests

Before examining the characteristics and mechanism of UNIDO's industrial survey assistance, it is instructive to consider briefly the nature of the needs prevailing in developing countries for such a service, since the latter strictly conditions the former.

In the light of current experience with the programme, it appears that countries that have expressed interest in industrial surveys cover a spectrum of economic and

industrial situations and respond to a variety of motivations that may be conveniently classified as follows:

- *Lack of basic over-all information.* This is largely the case in the least developed countries, where elementary economic data are scant and/or unreliable and where knowledge of industrial development opportunities is rudimentary. A similar situation sometimes occurs in the backward regions of relatively more industrialized countries. In both cases, basic surveys stand as a prerequisite to any efforts to promote industrialization.

- *Major changes in developmental conditions.* Large-scale economic, technological and institutional innovations in developing economies are likely to induce abrupt structural changes broadly affecting conditions and prospects for industrialization. Cases in point are discoveries of important mineral resources, the construction of major infrastructural facilities or entry into regional co-operation schemes. This may call for a thorough reappraisal of industrial development and its future orientation.

- *Need for periodic or ad hoc reviews.* Even in those developing countries where a fair amount of data and material are available to guide industrialization, the need may still arise from time to time for a general review. In this context, the industrial survey can serve effectively to evaluate past performance, update information, integrate partial studies, reconcile conflicting analyses, identify new courses of action and revise industrial programmes and policies.

These motivations underlying industrial surveys often overlap and vary from country to country. Three additional characteristics appear to be widely shared by most developing countries requesting assistance:

- *Requirements for operational results.* A common feature is the emphasis placed on operational results; namely, information and analysis that can be translated directly into action by the public and private sectors rather than academic exercises or purely statistical censuses.

- *Time constraints.* The reasons for undertaking industrial surveys of the type promoted by UNIDO are mainly associated with decisions that may significantly influence the process of industrialization. The postponement or poor formulation of such decisions, whether the impact is immediate or long-term, may seriously impair industrial development. This lends urgent character to the implementation of the surveys.

● *Inadequate national capacity.* Many developing countries do not have sufficient capacity to carry out industrial surveys without external assistance. Even when the necessary information system and technical resources are available locally, the benefit of outside and independent assessment, as well as a fresh point of view, may still be highly desirable.

### **Nature and content of surveys**

In view of the requirements outlined above, the industrial surveys carried out by UNIDO are based on functional concepts and objectives that depart substantially from those governing conventional stocktaking censuses and other data collection endeavours. What is sought is a practical and flexible device to assess the potential for industrial development, to elicit action from both national policymakers and industrialists and to improve decisions taken in that field at all levels. Accordingly, the industrial survey is essentially designed to produce, within a short period of time, an active diagnosis of the industrial situation, as well as a set of strategic data and guidelines for the investigation, projection, promotion, programming and implementation of industrial development.

As such, the industrial survey is a multifaceted instrument employing various approaches and disciplines. While it focuses on selective decision-related inputs, its scope provides for across-the-board coverage of the process of industrialization, including supporting policies and institutions. Similarly, several specialized economic and technical fields, besides surveying itself, are brought to bear upon the objectives in an integrated fashion.

It is difficult to give a precise description of the contents of an industrial survey, since each survey is tailored to the needs of the assisted country. However, in broad functional terms, the various aspects of a survey may be delineated as follows:

● *Assessment of past industrial performance.* This includes an examination of the growth of different branches of industry, the efficiency of manufacturing production, the effect of economic policy on industrial growth and the pattern and role of manufacturing in over-all economic development.

● *Analysis of existing industry.* This analysis covers the structure of the sector and its relation to the economy as a whole, including value of production, employment and investment by industrial branch, prevailing size of plants, importance of the factory-organized sector, installed capacity and its degree of utilization, structure of material inputs, destination of production, interindustry relations and geographical location. Industrial productivity, market structure and financing are also studied.

● *Assessment of industrial potential.* The broad potential for industrial expansion is defined by major sectors or industry groups on the basis of present capacities, projections of resource availabilities and requirements, estimates of actual and potential markets and the examination of technological alternatives. This leads to the identification and pre-evaluation of specific investment opportuni-

ties. A more detailed study of selected sectors, projects or products of strategic importance to industrial development may also be undertaken. The entire set of new projects is submitted to a preliminary consistency test involving aggregate resource constraints, as well as major technical and economic interrelations within manufacturing and with other sectors (e.g. agriculture, mining, infrastructure).

● *Appraisal of policies and institutions.* General economic and developmental policies affecting industrialization and specific policies related to industry are reviewed. Attention is devoted to the institutional infrastructure supporting the promotion, implementation and operation of manufacturing activities, while important questions such as regional industrial co-operation agreements receive close scrutiny. Changes required in policies and institutions are considered with a view to fostering the realization of the industrial potential defined.

● *Evaluation of external assistance requirements.* A natural outcome of the industrial survey exercise as outlined above is the identification of specific gaps between national potentialities and capabilities with regard to various aspects of industrial development, including the new investment opportunities detected. This facilitates the assessment of requirements for external support in terms of financial and technical assistance, and the determination of sectoral and temporal priorities. Emphasis is placed on outlining a long-term programme of technical assistance that can be supplied by UNIDO, taking into account the division of labour between international agencies and the availability of bilateral aid.

● *Strengthening of the industrial survey machinery.* While providing operational information for the review, orientation and acceleration of the industrialization process, the survey is used also as an effective means of evaluating and enhancing the industrial information system itself. An important function is to broaden the national capacity to operate, expand and refine that system in terms of data collection, processing and analysis (e.g. censuses, sample surveys, indicators, sectoral studies) of an action-oriented nature. The implementation of the UNIDO industrial surveys in close collaboration with national counterparts and their training constitutes a partial contribution in that respect. Recommendations are also made to strengthen further the industrial information machinery, including technical assistance required for that purpose.

### **Implementation of industrial surveys**

#### *The country survey mission*

The survey mission is the major means of providing assistance for the implementation of the type of industrial surveys under consideration and ensuring the efficient fulfilment of their objectives. Its flexible nature permits the adjustment of its various components to the technical requirements mentioned earlier—operational character, rapid results, comprehensive coverage, emphasis on decision-making—as well as their adaptation to the specific economic and industrial conditions of the assisted country.

These components relate to the terms of reference, composition and duration of the mission and complementary support. They are not set independently but managed in a co-ordinated manner so as to produce a "package" designed to achieve the best performance in each particular case.

Within the framework of the general group of functions outlined in the previous section, the terms of reference of the mission are established in the light of the particular needs of the country. In this respect, the industrial and economic information available, the studies previously done, the existing national surveying capacity and the broad prospects for industrial development are carefully considered. The terms of reference also indicate the composition and duration of the mission. Their formulation involves a substantial amount of preparatory work by the Survey Section of UNIDO as well as frequent consultations with government agencies responsible for industrial development through the UNDP resident representative and the UNIDO field adviser and, occasionally, preliminary missions by headquarters staff.

A typical survey mission is composed of four experts in various fields, including general industrial development (programming, policies), engineering, marketing and survey, depending upon the tasks to be performed. As noted before, the emphasis is on a multidisciplinary group to provide a flexible, powerful and integrated approach to the compilation, utilization and analysis of information that can be readily fed into the industrial development promotion machinery. The team members are international experts selected for their wide industrial experience in developing countries, as well as for their specialization in particular fields. One of the experts, usually a senior industrial economist, is designated as team leader and assumes responsibility for the direction and co-ordination of the mission's activities.

The duration of an industrial survey varies according to the above-mentioned factors—terms of reference and composition—as well as to the geographical and economic size of the country involved. The length of each mission (three to six months) is compressed as much as possible, however, in keeping with the generally urgent character of the actions and decisions associated with the information provided by the surveys.

A number of auxiliary elements contribute to a large extent to the successful implementation of the missions. These consist of a background review of the industrial situation of the country, the compilation and summary of existing material and other preparatory work done at headquarters culminating in a thorough briefing of the mission. The continuous technical and substantive back-stopping of the mission's operational activities through written advice, directives and the occasional dispatching of short-term specialists is also of considerable importance. Survey missions are likewise briefed by the United Nations regional commissions and by the UNDP resident representatives. They benefit from the assistance of UNIDO field advisers and resident experts. Finally, counterpart services are made available by the host Government, including the provision of material facilities and expert local personnel.

#### *Other forms of industrial survey assistance*

UNIDO offers other types of assistance to developing countries to facilitate selected aspects of work being performed by national and regional co-operation surveying institutions and/or to strengthen the latter.

Short-term advisory missions undertaken by staff members of UNIDO's Survey Section represent one such instrument of assistance. Their purpose is to provide temporary help in the implementation of important and/or difficult tasks of a specific nature. The bulk of the work is carried out by the aforementioned institutions with their own financial and technical resources. The selective tasks undertaken by advisory missions usually relate to survey methodology and design, drafting and testing of questionnaires, and the interpretation of results. These missions are often followed by additional work at headquarters by the staff members involved. This tends to create a flow of continuous contacts at the technical level between UNIDO and the beneficiary countries and institutions.

Another form of industrial survey support falling within the conventional scheme of technical assistance is the long-term assignment of experts for one or more years in advisory, operational and training capacities to reinforce and develop national and regional co-operation agencies working in that field. This type of assistance may be provided on a large scale through industrial Survey and Promotion Centres established under the UNDP Special Fund programme.

The training workshops in methods of industrial surveys organized by UNIDO on an interregional basis should also be mentioned. They aim at improving the skills of officials in developing countries responsible for industrial surveys and at facilitating the exchange of experience between them. A workshop for English-speaking countries was held in August 1970. Two additional ones for French- and Spanish-speaking countries are scheduled for 1971. These activities are expected to have a beneficial long-term impact upon the national capacity of developing countries to carry out industrial surveys.

#### **Follow-up of industrial surveys**

The basic character of the industrial survey as an information tool to support action and promote and guide industrial development requires that as much importance be attached to an adequate follow-up as to the original implementation.

Apart from assessing industrial potential, the recommendations emerging from an industrial survey mission may embrace a wide spectrum of activities such as feasibility studies, promotion of investment, technological adaptations and changes in policies, programmes and institutions, concerning both the public and the private sectors. Although these activities call primarily for national initiatives and efforts, external assistance is necessary to ensure their rapid implementation. Within UNIDO's scope of activities, technical assistance is the main catalyst

in bringing about the realization of the opportunities detected by the industrial survey.

A preliminary draft of a survey mission report is usually made in the field, where its broad conclusions are discussed with various government agencies. The process of follow-up and management of technical assistance begins with the extensive debriefing of the mission at headquarters. Its findings and recommendations are circulated among the substantive units for comments, suggestions and revisions with regard to technical content, technical assistance aspects and the implications and suitability of the latter for UNIDO. Further co-ordination of survey mission recommendations with country technical assistance programmes is envisaged in the context of the recently inaugurated long-range technical assistance programming scheme. After the report is in its final form, the officially revised version is submitted to the Government of the country concerned as a document containing an appraisal of the industrial potential of the country and a proposed UNIDO programme of technical assistance to help translate information and analysis into action.

Once the report is accepted, the Survey Section controls the provision of technical assistance by monitoring projects requested by the Government and maintaining regular communications with the substantive units to ensure prompt implementation. UNIDO experts and field advisers assigned to the country may also be requested to assist actively in the realization of the programme of action arising out of industrial surveys. In addition, UNIDO strives to maintain continuous follow-up contacts with the countries concerned, including, if required, subsequent short-term missions for the evaluation of implementation and updating.

#### *Current follow-up experience*

To give an idea of what has been accomplished by the industrial survey programme to date, the main results of the completed projects as well as follow-up actions are briefly outlined below.

**Ecuador.** A four-man industrial survey mission spent four months in Ecuador in 1969 at the request of the Government. On the basis of a thorough assessment of the country's industrial potential, the mission's final report indicated several ways to strengthen existing manufacturing activities and to promote further industrialization. It recommended that UNIDO assist the development of inter-related groups of activities in a number of sectors - agro-industries, light industries, wood and cellulose, chemicals and petrochemicals, metalworking - as well as the promotion of industrial exports. Proposals were made for the co-operation of other United Nations agencies, in some cases within Special Fund projects. A substantial number of recommendations were made to the Government regarding desirable changes in policies and institutions in the areas of industrial programming, incentives, location, standardization, design and quality control, especially in the light of the current Andean Subregional Integration Treaty. Special requirements for national action and external assistance in connexion with this agreement were outlined.

Following its official approval of the mission's report, the Government forwarded to UNIDO four requests for assistance closely aligned with the recommendations of the mission. Projects for which expert assistance was requested include: the development of an agroindustrial complex in the Guayas River Basin; the development of wood, cellulose pulp and paper and petrochemical industries by the Development Centre (CENIDES); the establishment of a Bureau of Industrial Standards; and strengthening of the external trade unit of the Ministry of Industries for the promotion of exports. These requests are now being processed.

**Kenya.** The industrial survey mission to Kenya, composed of three experts, returned from the field at the beginning of 1970. In accordance with its terms of reference and the particular requirements of the country, most of the efforts of the survey mission were devoted to the identification and preliminary appraisal of specific investment opportunities in manufacturing. As a basis for these tasks, a general review of existing industry and its future prospects was carried out in terms of organization, markets, finance and investment, manpower, location and opportunities offered by rural development.

The main activities identified as having excellent chances of success included the development of building materials industries (cement, asbestos, fibreboard, lime and gypsum products, wood-wool cement board and strawboard); agro-based industries (processing of castor oil and maize, milling and refining of edible oils); chemical industries (alcohol, charcoal and by-products, sulphuric acid and derivatives, resins); and miscellaneous industries such as bicycles and solar water heaters. Detailed feasibility studies as well as investment-promotion efforts were recommended for these projects. The mission also examined a number of important policies affecting industrial development, in particular the role of the Government in appraising and promoting industrial projects, incentive measures, industrial co-operation arrangements within the East African Common Market, the location of manufacturing activities with reference to rural development, tariff management and the collection and processing of industrial information.

One of the most important follow-up actions to the Kenya industrial survey is the establishment, with the assistance of the UNDP Special Fund programme, of an industrial survey and promotion centre. The project has already been approved by UNDP for two years at a total cost of \$640,000, 22 per cent of which will be borne by the Government. Staffed by seven resident international experts, short-term consultants and national counterpart personnel, the centre will continue the work initiated by the survey mission, undertake additional activities in the fields of project identification, evaluation, and promotion and advise the Government on industrial development policy.

**The Gambia.** The industrial survey of The Gambia was completed over a two-month period in early 1970 with the assistance of two UNIDO experts. The conclusions and recommendations of the mission's report reflect the assessment made of existing manufacturing activities and of the potential for industrial development. Considerable

stress was laid on the expansion of manufacturing based on natural resources, particularly agroindustries, and on the organization of small-scale industries. The report reviewed the institutional background and policies for industrial development with attention to programming, incentives, financing, tariff protection and government participation. Requirements for industrial data were also emphasized.

Various new projects in food processing were singled out for particular consideration. The mission recommended that priority be given to assistance in the following areas: programming and policies, evaluation of a food products complex, establishment of food standards, short-term technological consulting and development and industrial utilization of natural resources. Co-operation with other specialized agencies of the United Nations system was suggested for several of these projects. It is expected that the Gambian Government will request assistance from UNIDO in the near future along the lines proposed in the report.

**Lesotho.** In response to a request from Lesotho, UNIDO assigned a survey expert in August 1969 to undertake a short-term mission to assist in the preparation of that country's medium-term development plan and the evaluation of assistance requirements in the field of industry from both UNIDO and bilateral sources.

In assessing the country's industrial potential, three main factors were underlined: deficiencies in basic economic conditions for industrial development, the small size of the local market, and the prevailing customs union arrangements that require the potential manufacturing units in Lesotho to be competitive in price and quality with similar units in South Africa. In view of these constraints, further opportunities for industrial development were found to be mainly in agroindustries, including selected export activities, and small industries catering to the local market. Twenty-seven such industries were identified. Similarly, with respect to the drafting of the medium-term development plan, the expert recommended a course of action in the industrial sector emphasizing pre-investment activities, manpower training, labour-intensive industrial projects and the development of an adequate institutional framework for small-scale industries.

With these objectives in mind, three requests for technical assistance to strengthen the government machinery for the programming, appraisal and promotion of small industries and the development of an industrial estate were officially sent to UNIDO. These requests are now being implemented. UNIDO was also urged to assist in the operation and expansion of existing manufacturing activities, with particular reference to the processing of wool, mohair, skins and hides, and is at present awaiting official requests

for assistance in these areas. In addition, the mission report points out the need for assistance in establishing a board of industrial standards. The list of specific investment opportunities identified is to be used by the Government as a basis for investment promotion and negotiations on external aid.

### **Evaluation of the industrial survey programme**

When a new technical assistance activity claims resources that have alternative uses, the question arises of justifying it, gauging its performance and determining its evolution. Industrial survey assistance is still at the trial stage. Although it is designed to meet genuine and pressing needs in the developing countries and has operated well in the above-mentioned cases, it is too early to evaluate the programme as a whole. What can be and is being done is to keep the provision of such assistance under constant review to appraise its results, detect its weaknesses, correct its deficiencies, improve its efficiency and provide a rational basis for decisions on its future development as regards adaptation, contraction or expansion.

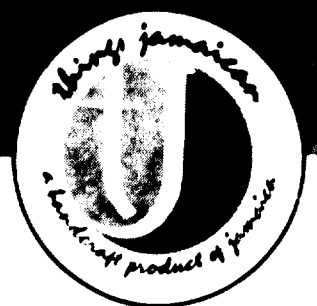
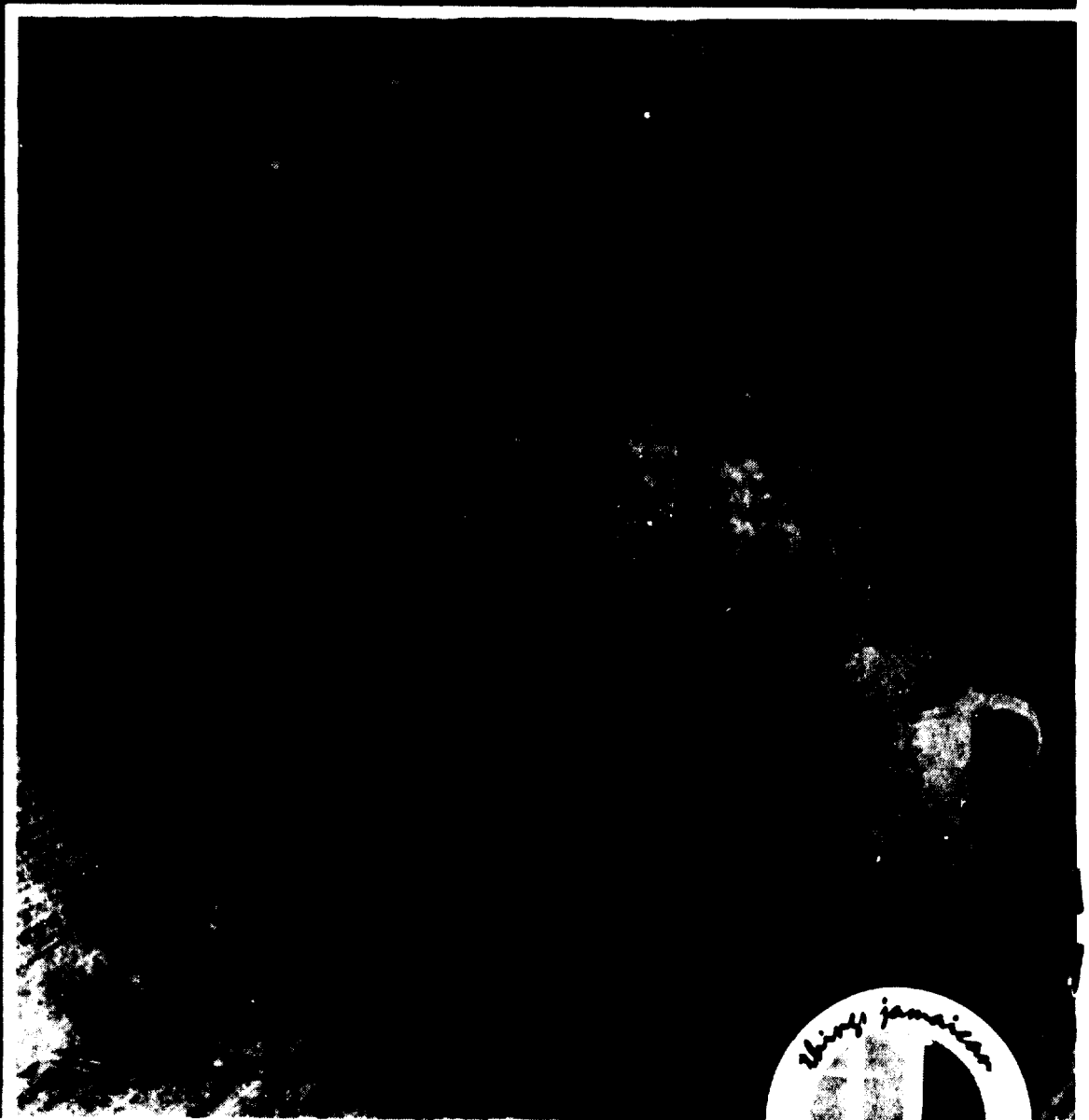
Many of these tasks are carried out during the debriefing of survey missions. Staff members of the Survey Section and mission experts make a detailed listing and analysis of difficulties encountered in the preparation, organization and implementation of the completed project and endeavour to identify any opportunities for improvement. This procedure is now being expanded and formalized into an automatic and continuous assessment by means of project evaluation questionnaires embodying basic data about each mission as well as observations and suggestions of participating experts. It is expected that the exploitation of these questionnaires, not only individually but also through cross-project analysis, will reveal further ways in which the programme could be improved.

A close check is kept on the concrete results and implementation of recommendations of survey missions through the follow-up method described earlier. This allows for effective implementation evaluation and control within UNIDO and in the country assisted.

In a broader context, UNIDO exerts special care to avoid duplicating the activities of other international organizations working in the area of industrial surveys, particularly those of the World Bank, with which UNIDO maintains close contacts.

An expert group meeting is scheduled for 1971 to assess UNIDO's experience in carrying out country industrial surveys and the assistance given through advisory missions. The recommendations of this independent group will serve as a guide for modifications in the approach, organization and management of the programme.

# THINGS JAMAICAN LIMITED





**C**RRAFT INDUSTRIES have blossomed into a promising operation in Jamaica since the Government set up Things Jamaican Limited, a company fostering the organized development of crafts in this small, independent country within the British Commonwealth.

Under the guidance of an ILO consultant, a design development unit was started. A team of local craftsmen and designers are now developing new, original designs in wood, pewter, straw, leather and ceramics. Things Jamaican has systematically reorganized the island's craft development operations and is successfully carrying out its main objective to promote craft work through research, training of workers, marketing and publicity. The company has a modern workshop with six production units including a department for straw-weaving and embroidery, a mechanized unit for wood products, a cast metal sector for pewter, a leather department, an art ceramics unit and a training and experimental weaving department.



**Jippijappa straw hats**

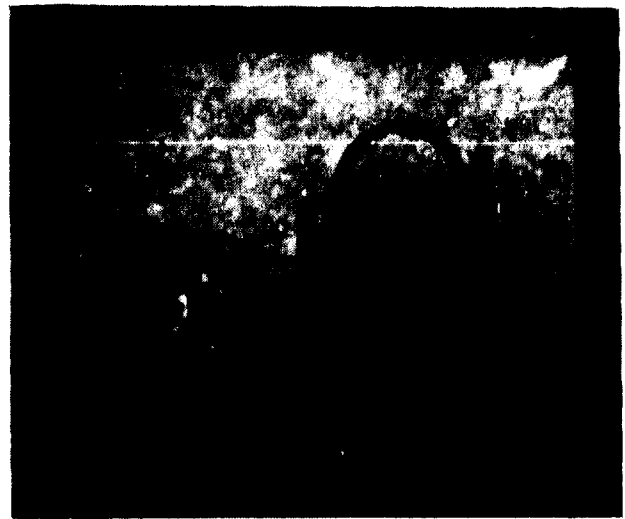
The product line of each craft has increased considerably under the guidance of the United Nations expert. Some of the craft products now being handled by Things Jamaican include: straw baskets, hats, bags, belts and dolls; wooden trays, bowls, boxes, spice racks and furniture; pewter ashtrays, spoons, plates, knives, coasters and coins; ceramic ashtrays, mugs, tankards and jars; and leather sandals, pouches, placemats and buccaneer belts.

At present eleven retail shops throughout the island are serviced by Things Jamaican. Both airports - Kingston and Montego Bay - greet tourists with an attractive display of Jamaican craft objects. Other islands in the Caribbean are being supplied with the handiwork of the Jamaican people, and Things Jamaican is developing its export contacts with the United States, Canada and Western Europe.

Organized craft activity began in Jamaica about thirty years ago through the Cottage Industries Agency of

Jamaica Social Welfare Ltd. Now known as the Craft Development Agency of the Social Welfare Commission, this organization is chiefly concerned with the production of straw goods and has nearly 100 community centres throughout the island. In 1965 the Government of Jamaica set up Craft Things Jamaican, a company for the more organized development of crafts; this was succeeded in 1968 by Things Jamaican Limited, which sponsors a wider field of activity than its predecessor, including cultural activities as well as the promotion of crafts.

The company is managed by a board of directors composed of representatives of the Ministry of Finance and Planning and prominent businessmen experienced in production, marketing, advertising and tourism. Except for the managing director who is a full-time employee, all directors, including the chairman and vice chairman, hold honorary posts. Directors are responsible for specific areas such as finance, production, marketing and advertis-



**Embroidered handbags from banana fibre and big thatch**

**Wooden candle holders**



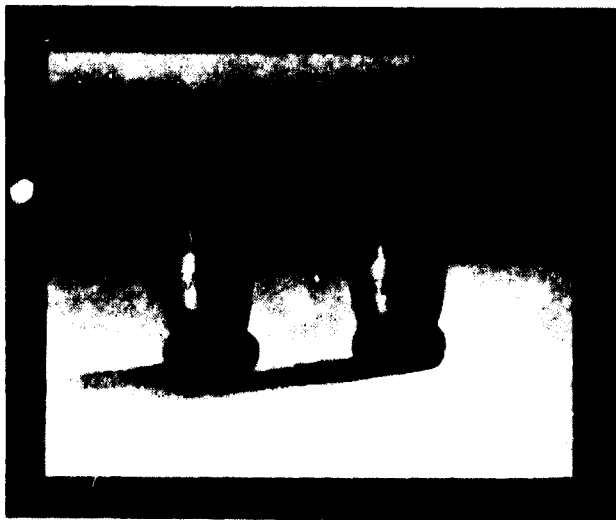


**Sandals of suede and straw**



**Wooden bread board**

**Turned wood salt and pepper shakers**



ing, and they maintain close liaison with the executive staff of the company.

A committee of five directors manages Devon House, one of the great mansions of Jamaica that has been opened as a display house where Jamaica's colourful historical development is revealed in all its fascination from the age of the swashbuckling pirates to the time of governing royalty. Things Jamaican has supplied Devon House with furniture and furnishings. A compact shopping centre on the estate displays the numerous handicraft products and garments of the island, while the Grog Shoppe, a popular tavern evoking the atmosphere of old Port Royal, attracts a steady tourist clientele.

The training of skilled workers has been one of the main contributions of Things Jamaican. For example, in fabric weaving, an entirely new craft introduced by the company, surprising accomplishments have been made. Young Jamaican girls trained to weave for the first time are producing beautiful handwoven drapery and upholstery materials.

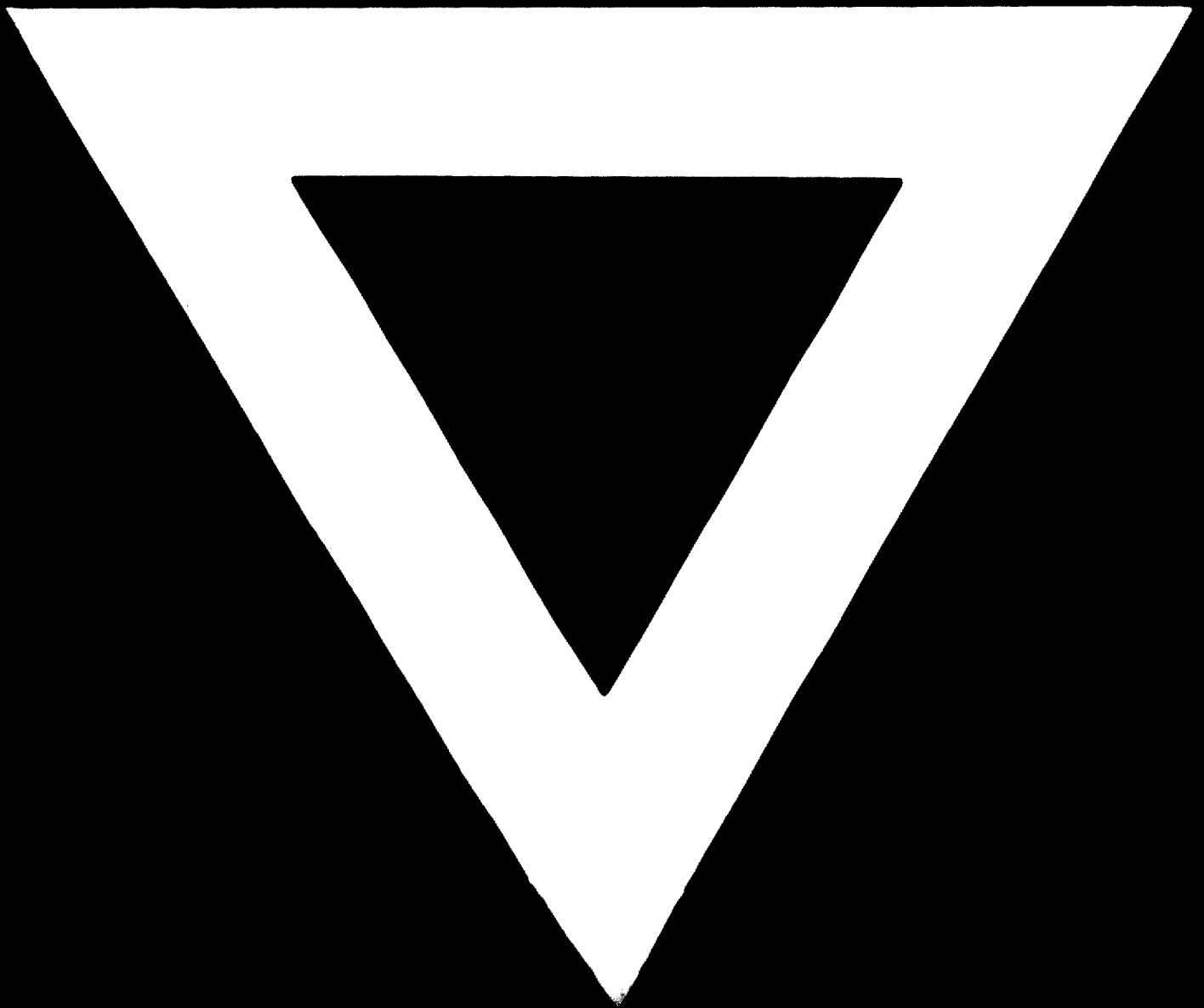
The company assists independent craftsmen and private production units by arranging for the sale of their products. Design guidance is provided free of charge, and workers are counselled concerning market reaction to their workmanship. Things Jamaican serves the craft industries by providing promotion and publicity and by arranging exhibitions and individual displays of all craft products.

The future of craft industries in Jamaica is promising. Skills learned at the production workshops are being used to build profitable cottage industries, and it is hoped that in the near future Things Jamaican will be able to introduce new crafts based on bamboo, glass, marble and metals other than pewter.

This small island country in the Caribbean, rich in natural wealth and beauty, has an agreeable climate that continuously attracts visitors, who now take back home with them the story and evidence of the many beautiful "Things Jamaican" being offered on the island.

**Yoyo - A popular toy made out of big black seeds**





**74.10.17**