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ADVISORY SERVICES IN THE PLANNING AND PROGRAMMING OF INDUSTRIAL DEVELOPMENT AND RELATED INFRA-STRUCTURE

M A U R I T I U S

(IS/MAR/71/004)

Consultant's Analysis

Terminal Report prepared for
The Government of Mauritius

by

Rune Ulfsax
UNIDO Expert

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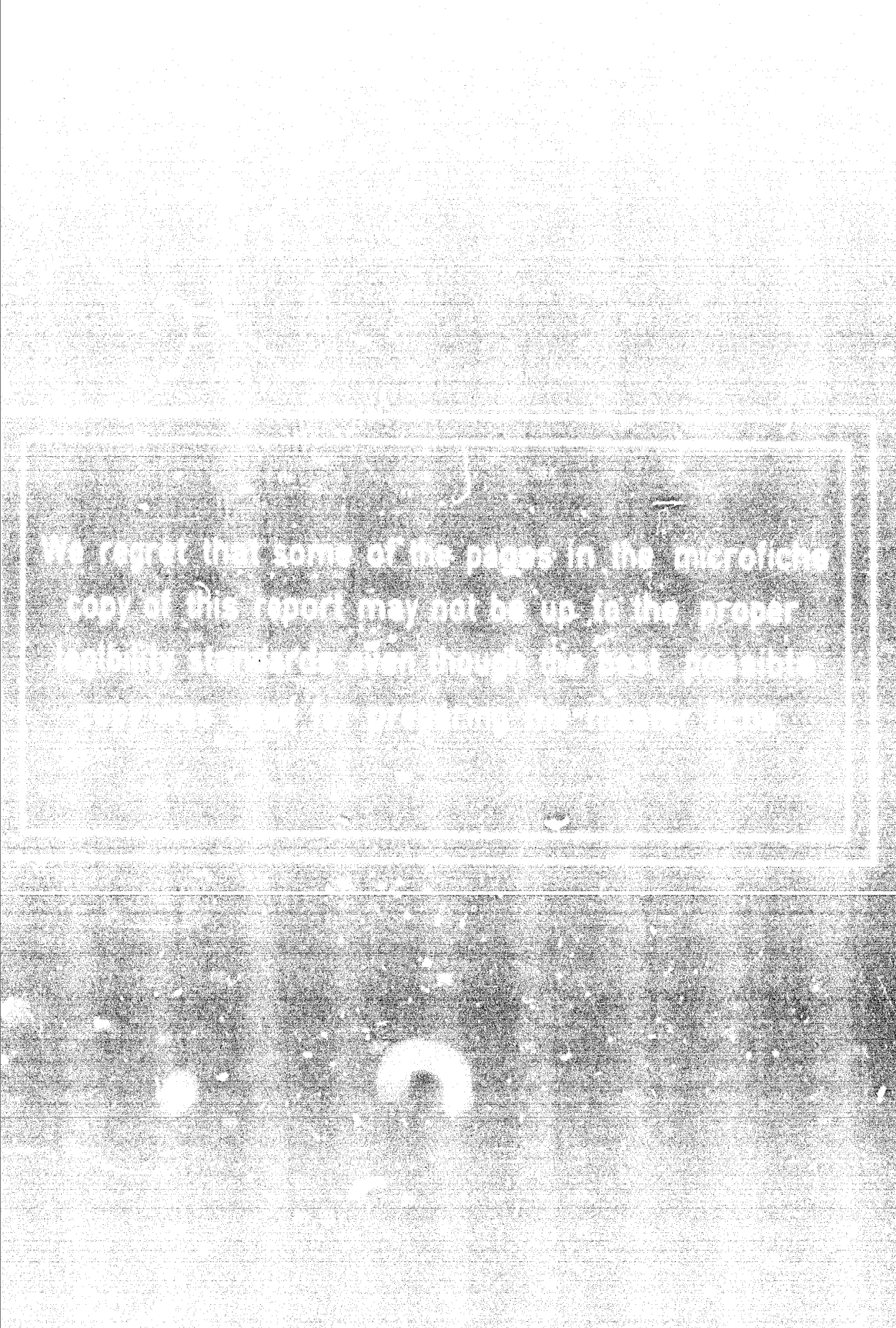


Reference: MAR/71/004

December 10, 1973

Mr. Arno Maneck
Chief
Section for Africa
Technical Co-operation Division
United Nations Industrial Development Organization
P.O. Box 707
A 1010 VIENNA
Austria

Final Report per 14.12.1973

Dear Mr. Maneck,

As previously reported I have kept a log over my activities from July 5, 1970 in accordance with which I have accounted for official working hours as distributed over main groups of activities. The break-down over the whole period of service is as follows, expressed in percent of the total official working time in Mauritius:-

		%
1.	Preparations for and drafting of the 4-Year Development Plan 1971-1975	21
2.	Duties connected with participation in the meetings of the Working Party to the Industrial Development Committee	10
3.	Formulation, control and revision of the Industrial Programme and Master Plan	9
4.	Formulation of evaluation criteria and methods, and individual project evaluation	10
5.	General duties related to the day to day operations of the Economic Planning Unit	8
6.	Duties related to the preparation, request and utilization of technical assistance	17
7.	Duties connected with major public sector projects (port development; airport; industrial estates)	8
8.	Follow-up and revision of policies related to industrial development	9
9.	Free Zone Feasibility Study	5
10.	Sundry (mainly winding up activities at the end of assignment such as arranging working papers and literature to be left behind; assistance to the drafting of "Evaluation Report on the Contribution of UNIDO to the Industrial Development in the Last Five Years")	3
	TOTAL	100

The distribution of work invites the following comments:-

(i) the great proportion (47%) absorbed in connection with the production of the Development Plan, and the follow-up of policies, and with the co-ordination and utilization of technical assistance of all types, reflects the overall specialization of my services due to my being attached to the Ministry of Economic Planning and Development, rather than the Ministry of Commerce and Industry as originally intended;

(ii) the time spent on my original assignment - Free Zone Feasibility Study - is small;

(iii) the time spent on technical assistance covers a variety of multilateral and bilateral projects; it would have been useful to have divided this account between UNIDO and others, which I regret I have not;

(iv) the winding-up activities have absorbed considerable time 3%; some of this was spent on assisting in the drafting of the "Evaluation Report on the Contribution of UNIDO to the Industrial Development in the Last Five Years"; most of this time was used in going through and arranging Working Papers, and other documentation to be left behind, in such a way that they could be usefully consulted; (see attached Annex E "Registration of Working Papers etc.")

(v) the break-down of activities does not feature "training" for the reason that it has not occurred; my Mauritian counterpart was academically well qualified and generally of a high calibre; we have simply worked together on all functions, gradually transforming my role first to advisory functions only and ultimately, from October 1973, to that of a consultant available on request, while winding up the assignment;

Although the post to which I am attached is funded for another year, I consider the mission completed with the now complete take-over of my former counterpart, who is eminently capable of undertaking all functions connected with the planning and programming of industrial, infrastructural and trade development, without the services of a resident adviser. Consequently I consider that the project could be discontinued with the expiry of my current contract, December 21, 1973, and have advised the Ministry of Economic Planning and Development accordingly.

As my period of service started with the preparations for the 4-Year Development Plan 1971-75, and has covered a complete range of aspects of the development of industry, trade and infrastructure the results otherwise of my activities are best indicated by the Government's own evaluation of the mid-term (June 1972) progress of these sectors of the Plan. In Annex "A" I quote for this purpose the relevant sections of the Government paper "Economic Survey 1970-1972", published in July 1973, to which I have added comments concerning principal Government development activities, in which I have been particularly involved. This exercise summarises both the character and extent of the totality of my services (excluding advise an free zones) and results of the efforts in which I participated.

The Industrial Programme has achieved so far what it was planned to achieve, in terms of employment creation. As pointed out, however, in "Economic Survey" there have occured deviations from policy as to the type of industry and employment created. Also the creation of human and physical resources has not been consistent with the schedules of the Industrial Programme and has therefore not

kept pace with industrial establishment, both actual and being prepared. The resources are therefore critically over-stretched. These negative factors, occuring in spite of clear-cut policies and detailed programmes, are serious enough to endanger the whole industrial programme if corrective action is not taken urgently. They depend on a variety of circumstances, some of which beyond the control of the Government, e.g. the unexpected slowness of international agencies to provide assistance agreed on. They also reflect the failure of my own efforts to overcome the difficulties in bringing about a full implementation of the required administrative tools for project evaluation and for programming, analysis, promotion, follow-up and control of implementation, designed and agreed on at an early stage in consultations between myself and concerned Government agencies. The partial implementation up to now has, however, been of benefit as it has co-ordinated attitudes to and influenced the handling of related matters.

The delays in receiving the findings of studies requested from UNIDO and other agencies, aiming at providing data for the planned selective industrial promotion, have also contributed to the present situation.

To summarize: the Industrial Programme has by mid-term been successful in achieving the principal and all important aim of employment creation. The Government is aware of such developments in the industrial sector, which are inconsistent with declared policies and programmes, and is preparing both to start emphasizing a more selective industrial promotion and to reduce the dangers of developing industry ahead of resources, by a systematic project evaluation and implementation analysis and control. My own activities have helped prepare for those pending Government actions through my participation in the following principal development activities: (i) the formulation of the UNIDO project "Technical Assistance to Industrial Development Services"; (ii) the restructuring of the administrative apparatus dealing with industrial development (proposed already in the Development Plan document); (iii) initiating, formulating the terms of reference of and supporting the series of consultancy studies aiming at providing data for selective industrial promotion; (iv) the elaboration and adoption of administrative tools for project evaluation and for programming, analysis and systematic follow-up of plan implementation; (v) securing continuity by handing over all functions concerning the Ministry of Economic Planning and Development in this context to a national official.

Free Zone Feasibility Study

A few separate comments are required concerning my original assignment. Little time was spent on this, due to the fact that the Government when I arrived had already decided to go ahead with the Export Processing Zone Scheme, which it had designed without any external technical assistance. I was therefore immediately attached to the Ministry of Economic Planning and Development with radically changed duties.

All the same I did a preliminary study of the feasibility of free zones and a preliminary market study. Although the industrial policy elements of my preliminary report, dated September 1970, on the feasibility study were subsequently used in advising on Plan policies, it was not circulated or generally made use of. As the advisability of establishing free zones for specific purposes may eventually be resuscitated, and as report contains still valid analyses and suggestions on free zones in Mauritius and on general industrial and trade policy matters, I attach a copy of it (Annex B) for the purpose of reviving it. I also enclose a copy of a circular letter used in making the market study (Annex C) and a copy of the result of the study, listing products, principal suppliers and Mauritian trading organisations of possible interest in free zone processing for and distribution to the Indian Ocean region (Annex D).

The report contains comments or recommendations e.g. on the following questions which may eventually be of interest to the Government.

* The Export Processing Zone system is a sound and workable alternative to Free Zones and offers the advantages of flexibility and immediate application, crucial in the Mauritian context. The following features are critized:-

  (a) the name "Export Processing Zone" is confusing as the scheme does not involve any zone but a system of "bonded factories";

  (b) the incentives are over-generous both in relation to the needs of the type of investors foreseen and to probable margin in the national economy for the granting of such incentives - which has not been determined; it is proposed that the minimum tax holiday period of 10 years is cancelled and that the incentives are not offered as a package but as a range of available incentives, negotiable according to circumstances in each case;

  (c) the scheme does not provide for the promotion of linkages between EPZ operations and the local industry and trade interests;

  (d) the exemptions from ordinary labour legislation is incompatible both with the concept of this type of facility and with the prime policy of maximising employment (to let young people and women work during periods normally excluded naturally reduces the potential employment rate)

* The Export Processing Zone scheme, together with other existing forms of concessions, make it unnecessary to establish also free zones to promote export manufacturing.

* The potential for Mauritius to establish itself as a base for regional distribution - including or not processing, manipulation, final packaging - may justify the establishment of a free zone in the Mer Rouge area, if cost of reclamation is found acceptable.

* A free zone might also be particularly attractive to international subcontracting activities.

* The particular attractions of a free zone would make it possible to offer limited fiscal incentives, provided such incentives granted outside the free zones were harmonized with those offered in a free zone.

* As the general import tariff pressure on imports is fairly substantial, also the trading organisations supplying the local market are likely to be attracted by free zone facilities.

The pending report from consultants Maxwell Stamp, requested by the Government from UNCTAD, on i.a. the potential benefits of the geographical position of Mauritius from a point of view of economics of distribution, is expected to illuminate the possibilities indicated in my report of promoting Mauritius as a centre for regional manufacturing and/or distribution.

Retaining the conclusions and recommendations I made in the 1970 report - and pending the Maxwell Stamp report - I would like to add the following observations:-

* The need to create job opportunities in keeping with the high educational level and expectations of a great number of young, male entrants to the labour market over the next decade, is becoming increasingly acute.

* Industrial employment may not always be considered sufficiently attractive for this large category of job seekers; activities connected with international trade and distribution, including marketing and other types of services sold to foreigners, would provide ideal employment opportunities; in the same time this would constitute an optimum utilization of the most important resource of the country, including a local business community with resources and experience of international trade.

* It would therefore seem highly worthwhile to pursue all possibilities of promoting such activities and to create the necessary facilities.

* It may not be necessary to establish free zones for the following reasons:-

  (a) free zones require a rather complicated re-structuring of port- and customs administrations and imply a concentration of heavy infrastructure to one area with somewhat restricted availability;

  (b) the only feasible area, Mer Rouge, will carry a substantial development cost and its use is of crucial importance to the Port Louis area; it would seem advisable to retain for the time being a maximum flexibility in the potential allocation of land in this area for various purposes;

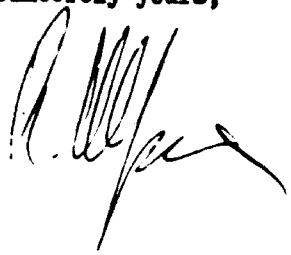
  (c) it is also important to retain the flexible and administratively relatively simple concessions now operating successfully, in particular the Export Processing Zone facility, through which export manufacturing and sub-contracting and similar activities are adequately facilitated and promoted, although for reasons of state revenue it will be necessary eventually to reduce the fiscal concessions;

* To facilitate and promote international and regional transit and trade activities including such activities related to the local market, it is likely that it would suffice to liberalise and reform the already existing system of "bonded warehouses", thereby creating a trade counterpart to the "bonded factories" - system, now operating under the name of Export Processing Zone; although this would mean a radical modification of the "bonded warehouse" facilities, and would entail stream-lining of other parts of customs administration, such a reform could be introduced without considerable technical difficulties entirely by locally available national experts; a suitable system of fiscal incentives has already been suggested in consultations between the Ministries of Economic Planning and Development and of Commerce and Industry.

* Both Export Processing Zone activities and the proposed "bonded warehouse" activities could be accommodated in the Mer Rouge area, together with other activities appropriate for a port area; no doubt this will entail some security problems which may lead to some loss at state revenue; the risk seems worth taking, but will necessitate very strict admission policies and a managing authority with well defined responsibilities as to general order and security in the area which should preferably be surrounded by a policed fence.

To conclude I am glad to state that the assignment with the Mauritian Government, under the auspices of UNIDO, has been most rewarding on a personal level. The job satisfaction has been complete and I hope that my services can be considered reasonably useful.

Sincerely yours,



Rune Ulfsax

ANNEX A

"MANUFACTURING SECTOR" Extract from "MAURITIUS ECONOMIC SURVEY 1970-1972". Mid-term review published by the Government in June 1973 on the performance of the 4 Year Development Plan	Brief Reference to directly related major developments activities in which inputs of assistance on the part of UNIDO adviser Rune Ulfsax have been substantial June 1970 - December 1973

1. General introductory notes (referring to "Brief References etc." only)

(i) The "4 Year Plan for Social and Economic Development 1971-1975" was elaborated in the period June 1970 - May 1971, was published in June 1971 and started operating July 1, 1971.

(ii) "Mid term" refers to mid term of plan period: end of June 1973.

(iii) A substantial part of the assistance activities of UNIDO has been co-ordinated through the Working Party to the Industrial Development Committee (WP/IDC), comprising permanent members from the Ministries of Finance, Commerce and Industry, and Economic Planning and Development. The Adviser on Planning and Programming of Industrial Development has participated in the work of the Committee on a regular basis, the other advisers occasionally in connection with particular projects.

Quotation from Government Paper "Mauritius Economic Survey 1970-1972"	Comments
This sector is expected to provide most of the planned employment opportunities (42,000) to be created by 1980. It would then have become the leading sector in terms of contribution to Gross Domestic Product. However, new employment creation in manufacturing by 1975 is estimated to be only 14,000 due to the time required for the building up of necessary infrastructure.	
POLICY	
2. The policy designed to bring about this marked structural change in the economy takes into account both the limitations of Mauritius and its comparative advantages. The limitations are due mainly to the insignificance of the local market, the lack of local raw materials, the high degree of import-substitution already reached, and the difficulty of establishing an independent export manufacturing sector on such a narrow base. The advantages include: a labour force which is intelligent and adaptable to high levels of technology but which is relatively inexpensive; an experienced and resourceful business	2. The formulation of industrial strategy, targets and policies. The drafting of the following Chapters of the 4 Year Plan for Social and Economic Development 1971-1975. "INFRASTRUCTURE" (Harbour and shipping; airport and air transport; electricity); "MANUFACTURING AND RELATED ACTIVITIES", "COMMERCE BANKING AND CREDIT INSTITUTIONS".

community willing to go into joint ventures with foreign promotors; a large pool of well educated young people who can be easily trained for supervisory and lower managerial duties; and the geographical location of Mauritius. In this context, the policy aims at encouraging international suppliers with established markets to locate labour intensive processing in Mauritius.

EMPLOYMENT CREATION

3. The Development Plan 1971-1975 projects a creation of 10,000 new jobs in manufacturing. In the subsequent master plan for industrial development, the target was raised to 14,000 by the end of 1975. The situation in April 1973 is summarized in the following Table:-

A = Employment Creation; B = Plan Targets

	A	B (Cumulative)
a) Employment creation by December 1972	2,200	2,200
b) Employment creation by December 1973		
i) Actual employment creation March 31st, 1973	3,300	...
ii) Foreseeable additional employment creation (Factories under construction and increase in existing plants)	5,400	5,000
c) Projected employment creation up to December 1975	...	14,000
d) Estimated balance of projected employment creation by December 1973	...	8,600
e) Indications of employment potential 1974 and 1975 (excluding projects where probability of realisation is low):		
i) Export enterprises approved but not yet operating (excluding projects accounted for in (b) (ii); 23 establishments	9,900	

3. The drafting of criteria and of a model for evaluation of industrial projects, securing consistency with policy, in particular emphasis on labour intensive industries.

Although the evaluation model elaborated and agreed on had not been implemented in full by mid-term, due to shortage of national staff, the extensive work of preparation, in which key Mauritian officials were involved, co-ordinated attitudes towards project evaluation criteria and helped maintain consistency in the evaluation of a rapidly growing number of project proposals. At a meeting of the MP/IDC on October 5, 1973 it was resolved that the full implementation of the evaluation model, as subsequently somewhat abreviated and modified by the Ministry of Commerce and Industry would now start in view of the recently completed recruiting of national staff to the Project Formulation and Evaluation Group of the Ministry of Commerce and Industry.

	A	B
		(Cumulative)
ii) Export enterprises under consideration for approval by Govt. 40 establishments	10,800	
iii) Import substitution industries approved but not yet operating, 21 establishments	1,100	
iv) Import substitution industries under consideration for approval by Government 15 establishments	1,300	

New applications are being submitted regularly to the Government. Actual development by April 1973, as shown above, clearly indicate that the industrial strategy and objectives are technically and quantitatively feasible.

PROGRAMMING

4. The implementation of this complex and ambitious industrial programme requires the co-ordinated efforts of various government departments, the private sector in Mauritius and abroad, and extensive technical assistance from bilateral and UN sources.

5. A detailed Industrial Development Programme has been set up, where the industrial policy outlined above has been translated into well-defined activities which were in turn time-scheduled and related to each other according to elementary principles of network programming. This Master Plan provided a system of references whereby performance (or non-performance) could be measured and constraints identified.

5. The elaboration of the programme and related systems for analysis and systematic follow-up of implementation. The systems had by mid-term not been implemented in full, due to shortage of national staff. The part implementation up to now, has however facilitated the co-ordination of the complex inputs to the Industrial Programme, including the UNIDO assistance. At the meeting of the WP/IDC on October 5, 1973 it was resolved to start full implementation of the systems without further delay as the required national staff had now been recruited.

ADMINISTRATIVE STRUCTURE

6. An important part of the Master Plan - i.e. the allocation of specific groups of activity to individual officials - has not been fulfilled, mainly on account of lack of personnel in the Ministry of Commerce and Industry. The administrative structure of this Ministry has, however, been strengthened by establishing the following functional units which have started operating:-

   (a) Project Formulation and Evaluation Group

   (b) Foreign Trade and Marketing Services Group

   (c) Industrial Development Promotion Group

   (d) Industrial Standards Bureau

6. The determination of the required character and extent of the strengthening of the administrative structure of the Ministry of Commerce & Industry.

7. These are currently operated mainly by UN experts (Industrial Economist Industrial Engineer, Foreign Trade Adviser, Industrial Standards Adviser) two UK projects evaluators and one Industrial Economist from France. The nine national staff posts foreseen and identified at an early stage, which were to take over from expatriate experts at dates specified in the programme of UNDP assistance to this Ministry, have to date not been filled. This lack of counterpart personnel has become a serious limiting factor for the effective use of technical assistance in building up national capacity.

7. The formulation of UNIDO project "Technical Assistance to Industrial Development Services" aiming initially at the reinforcing of the Ministry of Commerce & Industry by i.a. providing experts/advisers to Groups (a), (c) and (d), referred to in paragraph 6 of the "Economic Survey".

BASIC FEASIBILITY STUDIES

8. Among the basic feasibility studies which have been planned and prepared in order to implement the industrial programme, the following have already started:-

   (a) A study of transportation facilities in order to determine ways of improving and reducing the heavy costs of surface and air transportation of goods. Trade flows in the Indian Ocean Region are also examined so as to identify commodities whose flow could advantageously be interrupted in Mauritius to allow for processing, with subsequent packaging and distribution. The consultants who carry out this study (financed by UNCTAD) are currently in Mauritius and their report is expected by the end of 1973.

8. The initiation of studies (a) and (b), in connection with the elaboration of the industrial programme, and the drafting of the terms of reference of studies (a), (b) and (c). From November 1973 studies (a) and (c) will start to provide essential inputs to the planned, selective industrial promotion activities.

(b) A product oriented study in order to identify in international industry manufacturing processes which are inherently labour-intensive or which could be modified in order to suit more labour-intensive technologies in Mauritius. The consultants who will carry out this study are currently being selected by UNIDO.

(c) Preliminary work has already started at the Ministry of Commerce and Industry in order to carry out a market-oriented study of labour-intensive processes, based on the structure of the export industries and on the trade patterns of some highly industrialised countries. Technical assistance is given or will be required at later stages from UNIDO, UK, France and Germany.

MAIN FEATURES OF INDUSTRIES ESTABLISHED

9. It is estimated that during 1972 the value added in this sector has increased by 17 per cent over the previous calendar year. This corresponds to the annual growth rate of 17.4 per cent projected in the development Plan for manufacturing industries other than processing of agricultural crops.

10. In the industrial sector as a whole, investment in fixed assets in industries established since the start of Development Plan is on average Rs 7,200 per employee and the percentage of female employment is 76. In export enterprises and import substitution industries taken separately the corresponding averages are about Rs 5,000 and 80 per cent and Rs 24,000 and 43 per cent respectively. The Strategy of relying on export enterprises in order to create labour intensive new industries has thus proved amply justified. The high percentage of female labour in the export enterprises is accounted for by the large number of textile firms, mainly from Hong Kong, at present established. This predominance of textile firms is considered a temporary feature, due to the fact that Hong Kong industrialists are among the few who actually benefit from the tax holiday, and are also eager to set up textile and garment production in Mauritius in order to qualify for preferential treatment in the Common Market. A more balanced differentiation could be achieved if more firms from Western Europe and North America became

9. The determination of and assumptions, targets and
10. projections used in the Development Plan for the industrial and related sectors, and the research on which they were based. These assumptions have been borne out to a reasonable degree by the actual performance of the Plan by mid-term. There are however some significant inconsistencies, notably the predominance in the export sector of textile and garment industry and therefore of female employment and low investment figures.

established in Mauritius as a result of the more selective promotion made possible by the studies mentioned in paragraph 8 above. The new industries established in Mauritius since the start of the Development Plan can be grouped as follows:-

	Number of Establishments
Textile and garments	9
Food and drink	9
Chemical Industries	4
Electronics	3
Wood working	3
Travel goods and gloves	3
Steel working	1
Dry cells	1
Particle board	1
TOTAL	34

INDUSTRIAL SITES

11. Government is committed to the provision of serviced industrial sites and buildings (in advance of actual demand) both in the context of incentives to industry and for the purposes of physical planning. This part of the industrial programme has been delayed. The first industrial site (Lower Coromandel, 50 acres) has been favourably reported upon by the consultants engaged by the financing agency (the World Bank) but will not become available before 1974. Another industrial site, the reclaimed zone of Mer Rouge, is currently being studied by the UK financing agency, but will not become available before 1975 at the earliest. Given the surge in industrial development, an emergency program for additional industrial sites is being prepared, as well as a revision of the medium and long term programme.

11. The elaboration of a detailed development plan for industrial zones in connection with the first Industrial Programme, and participation in subsequent attempts to work out alternative plans and achieve coordination of the activities in this sector of various government agencies and international financing organisation.

CONCLUSION

12. The industrial development policy and programme have progressed satisfactorily on the whole. Employment targets are being met at present and appear feasible in the future. Some development is, however, not entirely consistent with policy, in particular the predominance of the textile and garment industry and of female employment. A greater diversification of industry will have to be sought through a more selective promotion - based on the ongoing studies mentioned above -

12. Strong, persistent emphasis in all policy documents - starting with the Preliminary Report on Free Zones dated September 1970 - on selectivity in industrial promotion, favouring labour intensive but high level technology, and an

and through the introduction of incentives attractive to a wider range of investors. At present the tax holiday provisions are often made inoperative by the fact that the tax foregone by Mauritius will have to be paid anyhow to the investor's domicile country.

appropriate and more efficient formulas for fiscal and other incentives.

ANNEX B

Table of Contents

1. Definition of and comments on the concept of free zone, its purposes, advantages and disadvantages, including a comparison with alternative facilities.

1.1 Definition and purposes

A "Customs Area" is an area in which a single customs administration exercises control over the entry and/or exit of goods. A "free zone" is a precisely delimited geographical area, taken out and physically separated from the customs area, and considered as foreign territory by that customs administration concerning the levying of duties and other taxes on import and export and concerning the control of the movement of goods and transport media connected therewith.

The basic principle and function of any free zone is precisely this freedom from intervention from the customs administration, whatever denomination, special purpose or added facilities and incentives are given to a free zone.

The function of a free zone is to facilitate, and minimize the costs of, selling, buying, transportation, storing and handling of commodities in international trade. It is here not appropriate to distinguish between trade and industry, as the latter is as much a function of trade - purchase of raw materials; selling of products - as of manufacturing. This function is, however, put to many varying specific purposes.

The original purpose was to facilitate transit and consignment trade. Free Zones with this purpose are still in successful operation. In its simplest form they operate merely as transit stations for goods destined to nearby, often landlocked areas. In its developed form they serve as regional centres for the stocking, marketing and distribution of goods, involving varying degrees of manipulation, processing and manufacturing.

Another purpose is to facilitate and rationalize imports to countries with huge internal markets and difficult customs and other barriers. In this context free zones can in fact be considered as a complement to a protective tariff system.

A purpose that has developed more in modern times is to use the free zone to encourage export manufacturing in countries with high tariff barriers, complicated controls over trade and exchange and in general heavy controls over business. The essential concept of freedom of operation - rather than other incentives, which inevitably carry with them some administrative control - is in a free zone of this type of particular significance.

1.2 General background and comparison with alternative facilities

In order to establish a basis for the definition of criteria to be applied in measuring the degree of feasibility of free zones in Mauritius, in order to avoid confusion with other measures with the same aim - sometimes applied in free zones but in principle outside the concept of free zones - it will be useful to summarise the underlying principles.

Import duties constitute a taxation applicable only on imported goods. However, technically speaking, the import duty should be considered as a tax liable only on imported goods consumed within the customs area. It would, therefore, be theoretically more correct to levy this tax in connection with the consumption, instead of at the time of import. A system of this kind could be considered under certain circumstances, and would bring advantages

to external trade. The practical difficulties connected with the administration of import duties levied in this way would, however, be considerable unless they were restructured to comprise only a few unified rates. Also the use of import duties as instrument for commercial policy would be almost eliminated.

The principle of import duties being in fact a tax on consumption is important to bear in mind when considering the various measures, including free zones, introduced all over the world, aiming at alleviating the consequences to trade depending on import and export, of the levying of import duties at the time and place of entry into the customs area. All these measures make possible either the postponement of the payment of import duty, in order to connect it as closely as possible with the consumption, or the exemption from payment of import duty - in some case the refund of duty paid - in relation to imported goods which are not consumed in the customs area but are re-exported, wasted, abandoned etc.

The most common facilities of this type, apart from free zones, are transit warehouses, bonded warehouses, customs drawback and customs credit. Less common are provisions for customs supervised factories and for customs rebate. For the purpose of comparison with advantages offered by free zones, which has to be done when considering the feasibility of establishing free zones, a summary description of these facilities is of interest.

TRANSIT WAREHOUSES provided by the customs administration and kept under its lock and key, are intended for temporary storage of imported goods, prior to assessment of duty and pending the importer's decision how to dispose of it. No manipulation or even breaking of packages is as a rule permitted. The maximum time of storage is usually short.

BONDED WAREHOUSES are permitted for various trade and industrial activities depending on imported material. The payment of import duty, usually assessed at the time of entry, is postponed until such time that the goods are withdrawn for sale or for processing in the customs area, or are re-exported. As the name indicates, the person liable for the assessed duty is requested to submit a bond or a security. Usually a bonded warehouse is owned by the importer and is kept under the lock and key of both the customs administration and the owner. There is a recent tendency to liberalize the control by permitting the owner to keep the bonded warehouse under his own lock and key only. As a rule no processing is allowed, but manipulation of goods, such as repacking, relabelling, sorting, grading, drawing of samples etc. are generally permitted. The time of storage is limited but usually generous.

Common basic characteristics for all customs supervised warehouses are the restricted possibilities for the owner of stored goods to dispose of them while under storage and the often cumbersome physical and administrative control exercised by the customs.

Credit as to the payment of periodically assessed import duties on goods, which are released to the importer for his free disposal - immediately upon importation, is sometimes granted registered importers. The credit periods are usually short.

The customs supervised warehouses, such as those described, serve mainly the import and export trade. Of greater importance to export industry proper are the provisions for customs supervised factories, customs drawback and customs rebate.

The facilities given to customs supervised factories are based mainly on principles similar to those of the bonded warehouses. The duty is accordingly assessed at the time of entry but not paid. The importer is in principle held liable for the duty and is requested to submit a bond or security and the entire operation is supervised and controlled by the customs administration. The system differs from that of the bonded warehouses in the respects that it comprises only materials used for processing and manufacturing, that such processing and manufacturing is a condition for the granting of the facilities and, finally, that the facilities are usually tied to specified export performances. As facilities of this kind are meant as incentives for export industry, and as only selected operators are licensed, the customs control is as a rule based to the extent possible on documentary evidence, with limited physical control.

The customs drawback system, of which the system of customs supervised factories can be considered as a liberalized version, is similar to that system except in one important respect: the import duty is paid upon entry and subsequently refunded for such portion of the imported goods, as is proved exported as part of manufactures. From this follows also that no bond or security is required and that the supervision and control of the customs administration as a rule is mainly limited to ascertaining the correspondence between imported and exported specifications and quantities. Identical systems for customs drawback exist also for trade purposes, involving no processing or manufacturing. Although the customs drawback system has the advantage of exposing state revenue to limited risks, and is comparatively easy in application, it has the essential disadvantage to the importer that he has to tie interest - carrying capital in customs duties. He also tends to consider the formalities cumbersome.

The less common customs rebate system is in principle different from the other facilities. It is here not only a question of postponing payment of duty, or exempting from such payment, goods which are subsequently re-exported, but an unconditional exemption from payment of import duty on specified materials for specified industries. In principle such facilities are temporary subsidies with the function of encouraging the establishment and consolidation of vital import substitution and/or export industries.

The common and basic characteristic of all the described facilities as distinguished from the free zone concept, is that they are applied within the customs area and - being fairly open to misuse and fraud - constitute in varying degrees a risk to state revenue interests. This in turn necessitates an administrative control, which to some extent tends to minimize the intended value of the benefits.

2.3 Advantages of free zones

It follows that the basic characteristic of a free zone - that it is a geographically limited and from the customs area physically separated area considered as foreign territory as regards customs duties and control - determines the character of the advantages offered by a free zone as distinguished from those offered by the other facilities described above. To this contributes an additional characteristic, related to and normally added to the basic one, namely freedom from import and export control and, as a rule, a relative if not full freedom from restrictions on the movement of money.

The character of a free zone as foreign territory is on principle restricted to the aspects referred to. In all other respects the free zone falls under the full jurisdiction of the state it belongs to. Laws and regulations

concerning e.g. public health, social welfare, labour/employer relations, company and individual taxation etc. are in principle applicable in the free zone. Facilities and incentives, other than those inherent in the free zone concept, are sometimes added to further increase the attraction to entrepreneurs and investors, such as tax holidays, exemption from fiscal fees and dues, loans on favourable terms, provision of industrial areas and buildings, provision of labour training facilities, contributions to export marketing and other research. It is important, however, to bear in mind that such incentives can be and are offered, and may function as efficiently, without free zones. Although they are to some extent inconsistent with the free zone concept, with a view to the fact that economic privileges of this type must entail specific conditions and controls, they may add considerably to the attraction thereof. In spite of the importance of these added incentives it has to be emphasized that the inherent incentive of a free zone-freedom from control and red tape in general is probably the most powerful one to the modern entrepreneur, dependent as he is for his success on quick and unhampered decisions and on the unrestricted choice of suppliers and markets in the international world of trade and industry.

The main specific advantages to the users of a free zone - not taking into account added incentives of the kind referred to above - can be listed as follows:-

TO THE MANUFACTURER (particularly for export)

Freedom to choose the most convenient sources of supply of equipment and material.

Possibility to purchase material at occasions when the price is particularly favourable and store it duty free in his own warehouse until needed.

Reduced investment through duty free import of equipment.

Immediate and unrestricted access to and disposal of imported equipment and material, without the necessity of advancing sums for bonds and duty payment.

Unrestricted freedom, speed and flexibility in marketing operations.

Possibility to establish in the free zone regional headquarters for sale, stock-keeping and distribution, thereby avoiding the cost of establishing stocks and sales' organizations in each separate market of the region.

In general benefit from the low goods' handling and transfer charges, normally made possible by the reduced control on goods and transport media.

TO THE TRADER (import and export)
(Apart from the advantages listed for the manufacturer):

Increased possibilities for re-export, transhipment and in-transit trade, with or without manipulations such as breaking bulk lots into smaller consignments, repacking, relabelling, mixing etc.

Inexpensive and unrestricted stock-keeping of goods regularly imported for the immediately adjacent market, paying import and other duties only when withdrawn in connection with sales, thereby saving interest and avoiding tie-up of capital.

Savings in import duty and excise tax on commodities liable to shrinkage of content during storage, or which are rejected because of non-conformity with ordered specifications or because of damage during transport or port handling.

TO SHIPS AND PORT HANDLING

Better equalization of outbound and inbound ocean traffic.

Savings to ship operators by affording prompt docking, uninterrupted discharge of cargo, quick lading, early clearance and consequently quicker turnaround.

Increased possibilities to co-ordinate port activities and to modernize the facilities, thereby affecting reductions in port costs and charges, and increasing the cargo production potential.

1.4 Other observations on the character of free zones

The autonomous character of a free zone, which provides the basis for the advantages described, also carries with it heavy commitments as regards infrastructure and services, both public and private, within the zone itself. As the essential purpose of a free zone is to facilitate and encourage the development of foreign trade, whether connected with export manufacturing, processing, manipulation or not, it is absolutely essential that the users of a free zone, and their suppliers of services, particularly as to transportation and handling, are offered the most efficient and complete facilities possible, such as terminal facilities, piers, warehouses, industrial plots and buildings, roads, housing and social services (also outside the zone), cargo handling equipment of all types, bunkering, ships provisions etc. There must be available, within the zone, efficient services for banking, shipping, stevedoring, customs' clearance, ships' repair and other technical services. A free zone administration usually offers a wide range of additional services such as maintaining a pool of trained manpower at the disposal of zone operators, public warehouses, stock management and distribution services, often connected with manipulation.

The investment required in public utilities is therefore usually both heavy and lumpy. Also, the effort required by the business community is considerable. No free zone would succeed easily without the ability and willingness of the internal and external business community to provide the essential services required. The feasibility of a free zone depends to a considerable extent on these two factors.

Also the potential disadvantages and risks are largely depending on the autonomous character of free zones. A free zone could turn into a veritable centre of smuggling unless it is surrounded by a constantly supervised barrier and unless the exit and entry from and to the surrounding customs area are strictly policed. On the other hand it is obvious that the risks involved in granting facilities of this kind are less when their implementation is concentrated physically to a free zone - if properly supervised - than when they are granted to individual establishments operating within the customs area.

It has been pointed out previously that the consideration of a free zone as foreign territory is mainly limited to the levying of customs and other duties and the control and supervision connected therewith. It is important to provide safeguards against the potential development of free zone

activities infringing upon other fields of state jurisdiction, or being harmful to existing economic activities in the customs area. The overall state policies and measures concerning e.g. public health, protection of environment, building and factory codes, social welfare, wages, labour/industry relations should be applied on the whole on the same basis in a free zone as in the customs territory in order to avoid the risk of disturbing the overall economic and social structure. Such safeguards are in general built into the admission policy. Any exceptions to this general rule, which do occur, are naturally very carefully weighed before introduced.

As the essential characteristic of a free zone is freedom from institutional constraints on operations it would be inconsistent to oblige the operators to purchase equipment, material and services from the customs area whenever available, even if the qualification of comparable prices and qualities were added. For this reason there is an inherent risk that suppliers in the customs area will have difficulties in obtaining their legitimate share of business generated in a free zone, unless they are given opportunities, through institutional facilities, to compete on equal terms with foreign suppliers. The main difficulty in this context is the import duty element in offers to free zone operators from suppliers in the customs area. Offers from foreign suppliers would not include as a rule any duty element. Liberal rules as regards customs drawback and other institutional facilities are therefore essential in order to enable suppliers in the customs area to contribute as fully as possible to the development of the free zones operations. This is naturally of national interest, particularly in cases where the creation of job opportunities is essential. Also with a view to the importance of inter-industrial interdependence in the overall economic policy, a free zone should not be permitted to develop into an economic enclave, entirely without relations to the industrial and other economic activities in the customs area.

Finally may be mentioned a disadvantage, or rather complication of a customs technical character, connected with free zones. It concerns the customs procedures and supervision upon entry of goods from the free zone to the customs area - either stored or manufactured there or carried through in transit - and upon export through the free zone of goods emanating from the customs area. The complications arise from the fact that goods in the free zone are under the responsibility of the free zone administration as depositary and not under the direct control of the customs. Adequate procedures must therefore be devised to keep apart in the free zone goods that are declared for the purpose of import or export, and thereby are transferred to the responsibility of the customs administration, from other classes of goods in the free zone. This particular complication is important to attend to in the early stages of planning a free zone, for the reason that any port with free zone status offers quicker and cheaper services to all shippers and is likely to be used extensively for all import and export shipping, whether emanating from the free zone operations or from the customs area.

1.5 Basic prerequisites for the establishment of a free zone

The following are the basic prerequisites for the establishment of a free zone:-

High import tariffs and other substantial barriers and constraints on industry and trade depending on import and export.

Adjacent foreign markets for the development of export, re-export and transshipment trade, with consideration in particular to trade policies

and barriers, trade agreements and level of industrial development in such prospective markets.

Availability of raw materials, and/or ready access to raw materials from external sources. Availability of labour, management, finance and public and private utilities and services at attractive costs.

Ample and well organized terminal and transportation facilities at attractive costs.

1.6 General comments to basis prerequisites

The importance of the first listed prerequisites - high import barriers - is obvious, considering the analysis made above. If there were no import duties imposed upon the entry of goods, and therefore little customs control and other interference, there would be no need for a free zone. Consequently the need to consider the establishment of a free zone will be more or less proportionate to the height and character of the customs barrier and other constraints connected therewith. This constraint factor has then to be weighed against the customs facilities offered to trade and industry in the form of bonded warehouses, customs drawback, customs rebates etc. Again, in principle, the weight of the constraint factor inherent in the customs barrier is reduced in direct proportion to the extent and character of such customs facilities in operation. If these facilities function satisfactorily they could, together with other institutional incentives, form a sufficient basis for a desired development of trade and industry connected with import and export, thus avoiding the heavy investment usually required in free zones.

The second prerequisite, adjacent foreign markets etc., is partly of the same character as the first. If the constraint factor in adjacent foreign markets is high, and consequently the establishment of foreign trade and industrial activities there is difficult and costly, the value of a free zone in the area, serving as a convenient base for manufacture and/or distribution, could be considerable. The level of industrial development in relevant areas is, of course, a decisive factor to consider in establishing the potential output of a free zone as regards both the volume of business and the product range.

The third prerequisite, availability of raw materials, labour, utilities and services has already been referred to together with the prime importance of first class public and private utilities and services.

The requirements as to labour, financing and management are not in principle affected by the particular character of a free zone, but are equal to the requirements in any desired economic development outside a free zone. As to the availability of labour it is important to remark that although low or reasonable wages and social costs are important, the main consideration for any serious entrepreneur is the level of skill, adaptability and dependability. It is the experience of industrialists in some developing countries that the aggregate labour cost has turned out very high inspite of very low wages. A very important aspect in this context is naturally the level of organisation and negotiating abilities of labour organizations, with which the employers in a free zone will have to come to terms. Serious employers in a free zone would not expect freedom in this respect, but would consider indispensable the existence of a dependable machinery for consultations and negotiations in settling costs and conditions on long terms, on which he will have to depend in calculating his cost/return factors.

The availability of raw materials locally is not an absolute condition for the development of free zone industry, provided they can be brought from external sources at reasonable cost.

The fourth prerequisite given - ample terminal and transportation facilities - is of particular importance in cases where a major part of the materials needed for production has to be brought in from external suppliers. In fact, the advantages of a free zone take on a special importance in cases where industrial development is essential and has to be based mainly on imported materials and on the export of manufactures. The geographical position of a free zone in relation to sources of required materials and in relation to potential markets for the products, and the actual and potential freight costs depending thereon, will largely determine both the potential volume and the types of manufacture feasible. If transportation costs are high the tendency will logically be to look for feasibility as regards to operations involving materials and products having a high value/volume-weight ratio.

2. Summary review of conditions in Mauritius compared to the basic prerequisites

2.1 Import tariffs and other constraints

Although the customs duties play an important role in the fiscal policy of Mauritius, representing approximately 25% of the total state revenue, which gives the relatively high overall import taxation of approximately 15% of the total c.i.f. import value, the Customs Tariff as revised 1969, is liberal in the taxation of materials and equipment identifiable as being exclusively for industrial use, most of which carry a zero rate unless manufactured in Mauritius. Other commodities used by industry - but not classified as for exclusive industrial use - are generally low to moderately taxed. The rates of import duty are thus fixed with a view to the encouragement of industrial development.

In addition there are in operation two systems of customs concessions to industry, as provided for in the Customs Tariff (Drawbacks and Rebates) Regulations. Customs rebates to manufacturers, intended mainly as an incentive to the establishment of import substitution industries, are of a generous nature. They allow a number of specified industries to import free of duty (from preferential sources) a series of raw materials, semi-manufactured and even some manufactured materials. This is a straight forward tax concession, which furthermore, is not limited to a certain period or tied up with any export or other performance. There is no question of having to pay the duty first and then claim a refund as is the case with the second system, the provisions for customs drawback. This applies to imported materials listed as used in manufactures, pronounced economically feasible. The procedure is simply that the import duty is paid upon entry, and a proportion thereof, corresponding to the quantity of the imported commodities going into manufactured articles exported, is refunded upon a exportation.

An additional system of concessions has recently been introduced, which will become operational on the 3rd of November 1970. It is referred to as the Export Processing Zone but its operation is not confined to any delimited and from the customs area physically separated area. Single industries, or groups of industries, will be considered as export processing zones and will be granted complete exemption from payment of import duty on machinery and

equipment and exemption from payment of import and excise duty on raw and semifinished materials going into exported manufactures. In addition operators under this system are granted priority treatment assuring them shortest possible delays in issuing import - and export licenses and in completing customs inspection of incoming and outgoing commodities. The concessions are tied to export performances according to the classification of operators. There are to be two categories. Category "A" operators enjoy the concessions on condition of 10% export and Category "B" operators on condition of export of 20% of the value of the total sales. In addition Category "B" operators are granted duty free import of raw and semifinished materials for products manufactured for the local market during the first three years of operation. The Export Processing Zone facilities constitute in fact a liberal system of "customs supervised factories".

To the customs rebate system, and particularly to the Export Processing Zone system, are added tax - and other incentives. Category "A" operators under the latter system enjoy the widest benefits such as: corporate income tax holiday 10 to 20 years; loans at preferential rates of interest; electric power at preferential rates; export finance at preferential rates of interest; priority in the allocation of investment capital by the Development Bank of Mauritius; provision of factory buildings or loans up to 50% of total building cost; lease of plots at preferential rates; contribution to the costs of approved market research and collective advertising; agreement in principle to exempt from income tax profits earned from foreign investments to the extent that these are re-invested in Mauritius. In addition operators are granted a series of supporting facilities. The incentives offered to Category "B" operators are less important than those offered to operators in Category "A" of the Export Processing Zone and under the Customs Rebate Scheme, notably excluding the incentive of tax holidays.

The import duties on other classes of commodities, other than for industrial use, are generally high, although not higher than in most developing countries. A system of bonded warehouses is in operation which make possible the postponement of payment of import and excise duties until the commodities stored are withdrawn for consumption. The movement of goods through bonded warehouses is considerable, representing an annual value of about Rs 40 million. Apart from re-exported ships' stores and bunkers, representing an annual value of approximately Rs 18 million, the bonded warehouses are used almost exclusively for commodities for internal consumption. Due to the strict limitations of manipulation permitted in the bonded warehouses, they do not offer any significant facilities for transit and consignment trade.

Finally, there are provisions for customs drawback in connection with re-export without transformation and for the duty-free handling of transshipment, which are at present not widely used.

Conclusions

As far as the development of export manufacturing is concerned the customs barrier is negligible. The customs concessions available are complete and are as liberal as possible. In addition, the added incentives are very generous. Altogether the customs tariff and other institutional restraints in this sector of the economy do not in principle justify the establishment of free zones, unless the amount of administrative control and supervision, made inevitable by the fact that these concessions and incentives are applied within the customs area, turn out to diminish critically their purpose of attracting additional industrial establishment.

Concerning the import of commodities for internal consumption the existing system of bonded warehouses may adequately serve the purpose of moving the burden of taxation from the time of entry to the time of consumption. Due to the small volume of the internal market it would not be justified to consider the establishment of free zones in order to offer wider facilities to the import trade than are now available.

As regards a possible development of transit and consignment trade in large scale, with or without manipulation or processing, the required customs concessions and facilities are not available. If such - usually labour intensive - activities are found feasible with a view to accessible markets and transportation facilities, it would be justified to consider the establishment of free zones.

2.2 Potential markets

The consideration of this prerequisite is particularly crucial in the Mauritian context as there are practically no established markets today for manufactures, apart from the markets for sugar, molasses and tea. In a preliminary evaluation of the marketing potentials it is convenient to divide the possible markets in the following three main groups:-

(a) Markets - in principle geographically limited - depending mainly on distributional factors such as transportation facilities and costs, traditional trade routes and position of competing free zones.

(b) Markets - in principle <u>not</u> geographically limited - depending mainly on the attraction of the supply of skilled and/or inexpensive labour.

(c) Markets - in principle <u>not</u> geographically limited - depending mainly on trade policy factors, such as trade agreements, commonwealth preference and politically motivated restrictions on trade between specific countries.

In actual trade such strict division is, of course, seldom found. The different types of marketing operations are often mixed and support or even depend on each other.

MARKETS TYPE (a)

The Mauritian market itself is too small to be of much importance in considering the feasibility of free zones. The total imports amount only to about 375 million Rupees of which manufactures represent approximately 50%. Furthermore the existing industries' legitimate need of protection would probably necessitate restrictions on the imports of manufactures to the customs area from free zones.

The geographical position of Mauritius, and existing and potential shipping routes, indicate a potential main geographical market area for both eastward and westward trade flows, covering the neighbouring islands, South and East Africa and adjacent landlocked areas in Central Africa. There are no competing free zones in this area, except an entrepot for Ethiopia in Djibouti and entrepots at Beira and Lorenzo Marques for Rhodesia, Swaziland and South Africa.

These markets generally present high customs and other barriers. Principal suppliers to them may therefore find it convenient to supply them from a distribution base - with or without manipulation, processing or manufacturing - in a free zone in Mauritius. There are indications that Madagascar is considering the possibilities of a free zone. This will have to be investigated and, if need be, measures taken to eliminate the risk of a mutually damaging competition.

In Table I are given examples, with annual import values, of classes of goods, imported to South and East Africa, which may be considered for this potential function of free zones in Mauritius.

A second range of markets depending on the geographical position of Mauritius may be found in the Arabian Gulf, Iran, Pakistan, India, New Zealand and Australia for the west to east trade flow, in spite of the numerous free zones, free areas and entrepots operating in these areas. The feasibility of such a function will, however, to a large extent depend on the possibilities of basing it - as any additional activity - on facilities created for the above suggested main marketing area. In Table II are given examples, with annual import values, of classes of goods imported to Australia, which may be considered in this context.

MARKETS TYPE (b)

The second type of market, not depending in principle on the geographical position of Mauritius but on the attraction of the availability of skilled and reasonably inexpensive labour, can be subdivided in two groups.

One group concerns very labour intensive products, the manufacture of which tends to be too costly in highly industrialized countries, where labour is expensive and scarce. Examples of this type of product are textiles and clothing, which are imported to such countries - and also to developing countries - in great quantities from suppliers in e.g. Hong Kong, Singapore, Taiwan and Korea, as shown in Table III. It seems, however, doubtful if Mauritius is in a position to establish a successful competition for the markets of such products, or even if it would be advisable to try to encourage to a great extent that type of industry, which is characteristically subject to marketing hazards. Wage levels in Asian countries - taking a longer view - are in general likely to be lower than in Mauritius. Also the basic characteristic of manpower in Mauritius is not its low price but its potential adaptability to more advanced, and more profitable, industrial technology.

The second group within this type of market is connected with the possibilities to attract international subcontracting. There is already a perfect example of such an activity in Mauritius, the Micro Jewel factory, which is undertaking, on behalf of clients in Europe, a processing of industrial diamonds, requiring great manual skill and advanced technological methods. The background to this potential function of free zones in Mauritius is the fact that many technologically advanced products are labour intensive in some stages of their production and that the principal supplying countries pay the world's highest wages. In the same time the competition between these countries both on their home markets and on export markets is fierce. Logically, the manufacturers of these products are increasingly searching for sources of inexpensive labour and are subcontracting the production of component parts, subassemblies and finished products in areas with inexpensive labour for export to other areas and for sale in the home markets. U.S. companies started this trend by subcontracting work to firms in Japan

and Western Europe. Recent examples of such subcontracting are: Ford Motor Co. - generators manufactured in Japan; Signetics (U.S.) - ships components to Korea for assembly into integrated circuits - flown back to U.S. for fitting into computers; Fairchild Camera and Instruments (U.S.) - subassembly of integrated circuits in Singapore; Rollei-Werke (West Germany) - plant in Singapore for the manufacture of cameras for sale in the U.S. and East Asia; Societa Generale Semiconduttori (Italy) - plant in Singapore for the manufacture of transistors; Motorola (U.S.) - assembly of transistors in Korea; Philips (Holland) and Plessy (U.K.) - planning plants in Singapore for electronic products; Philips (Holland) and General Electric (U.S.) - plants in Taiwan.

Although the aim of these manufacturers is to reduce their costs by taking advantage of low wages in other countries, compared to the wages in their home countries, technical skill and adaptability is decisive in their choice of subcontractors.

Great advantages from this type of activity to the countries of subcontractors are: introduction of technological and managerial know-how; great financial resources and therefore reduced need to offer far-going tax - and other financial incentives; established markets and therefore limited export marketing risks and export promotion costs.

With a view to the evidence of the adaptability of Mauritians to technical skill, and the reasonable wage level, there is likely to be a considerable scope for international subcontracting in Mauritius, either within the framework of the Export Processing Zone facilities or within free zones.

MARKETS TYPE (a) and (b)

As an illustration of the product range and scope feasible both for subcontracting and regional marketing operations, separately and combined, in the suggested main market area, the annual import values in South and East Africa for some selected items have been compiled in Table I (see also Table II). The commodities have been selected according to one or more of the following criteria:-

high value/volume-weight ratio;

speciality: not likely to be considered for manufacture in reviewed markets;

speciality: involving a few very big suppliers with established markets;

suitability for part processing or manufacturing and/or final processing before distribution;

requirements as to continuous technical after sales services and supply of spare parts;

requirements as to flexible stock keeping with connected manipulation, such as breaking of bulk lots, repacking, relabelling etc.;

As a complement, the annual import values for groups of commodities in several markets in the Indian Ocean area, are shown in Table IV. The main purpose of this table is to indicate the total volume of the trade considered and the relative volumes of commodity groups and markets discussed.

Although this preliminary evaluation covers only a few countries and commodities, it does indicate a possibly sufficient potential volume of business for free zones in Mauritius for the types of commodities indicated. The additional volume of potential supplies to other markets, outside the suggested regional marketing area, including subcontracted production intended for the highly industrialized countries themselves, is difficult to estimate, but may be assumed to be considerable.

MARKETS TYPE (c)

Trade policy factors do not create markets but may play a decisive - inhibitory or supporting - role in exploiting marketing potentials. Free zone operations in Mauritius will for this reason depend on a flexible and aggressive official trade policy.

Existing positive factors in considering the feasibility of some of the suggested free zone operations are the commonwealth preference accorded, at least for the time being, in the U.K. to goods of Mauritian origin and the tariff preferences and quotas for some manufactures imported to Australia from developing countries, including Mauritius. The list of manufactures granted preferential treatment in Australia includes several items listed in Table I and II, such as: gauze, bandages etc.; cosmetics and perfume; domestic refrigerators; domestic washing machines; typewriters; calculating machines (manually operated); electric fans; spectacle frames; medical instruments; wrist watches; clocks; toys.

This type of preferential treatment to developing countries is at present granted only by Australia. The UNCTAD Special Committee on Preferences is at present working on proposals for the introduction of a generalized system of such preferences in developed countries. If these efforts will be successful, which seems not unlikely, the attraction of free zone operations in Mauritius may be enhanced. It has to be pointed out, however, that strict rules of origin will be applied. Australia e.g. requires that manufactures will be treated as originating in a developing country if the last manufacturing process has been performed in that country or if not less than one half of the value of the goods is represented by the value of labour and/or materials of that country or of one or more of the other developing countries or of Australia itself. Also it is at this stage not clear how processing in and export from free zones may be considered with reference to the rules of origin. Developments in this aspect must be closely followed and measures taken, if necessary, to counteract any possibly negative attitudes.

2.3 Raw materials, labour, management, services and finance

There are very few raw materials of potential importance to free zone activities. Sugar may be of interest to export manufacturers of sugar confectionary, and alcohol to manufacturers of e.g. perfumery and toilet preparations. The annual import values of these products in some of the markets in the potential marketing area are included in Tables I, II and IV. They may be sufficiently important to indicate some possibility of attracting large scale exporters of these products to manufacture in free zones in Mauritius, provided they would in the same time find advantage in using such free zones as regional centres for sales, stock-keeping and distribution.

A distinct advantage in considering the feasibility of free zones in Mauritius is the existence of manufacturers of packaging material, labels etc., of experienced civil - mechanical - and electrical engineering firms and of suppliers of industrial accessories and services. Also, there are ample services as to banking, shipping agents, chartered accountants, lawyers, internal transportation etc. The experience and growth potential of these organizations can in general be estimated sufficient to meet any demand in connection with any possible free zone operations.

The most important resource in Mauritius is the labour force. It can be estimated that the number of workers available for export manufacturing, or other activities connected with export trade, will increase at a fast pace during the next decade to reach approximately 30,000 in 1980. The wage level is likely to remain comparatively low as the supply of labour is likely to continue to be greater than the demand. However, with a view to the character of the suggested main marketing possibilities, the skill and adaptability to industrial technology must be considered - and promoted - as the principal feature.

Although the exports so far have been confined to sugar, its by-products and tea, Mauritius has been a trading nation for hundreds of years. Experience has been accumulated to a sufficient degree to indicate an adequate potential as to managerial skill in administration and commercial operations, which could be developed without great difficulty to meet the demands of free zone operations. The by tradition technologically highly advanced sugar industry provides an equally adequate potential as to technical management. The University of Mauritius is already contributing to the development of managerial skills, and free zone operators of the type envisaged would in their own interest undertake the training of managerial staff.

The financial resources are scarce. The heavy investment in free zone infrastructure only will require financing from external sources, which may not easily be obtained. It would be even more difficult to raise loans from external sources for Mauritian public or private participation in the financing of free zone entreprises. This state of affairs indicates the desirability to attract - in the first place - the type of operators referred to above, who would have adequate financial resources of their own and who would therefore have relatively limited requirements as to local financing and tax - and other financial incentives.

2.4 Terminal and transportation facilities

Terminal facilities

There is one commercial port in Mauritius, the Port of Port Louis on the North-West coast.

In part II of the E.C.A. "Preliminary Survey of Factors Contributing to the Level of Freight Rates in the Seaborne Trade of Africa and Related Matters" the following statement is made concerning the port:-

"The port of Port Louis is noteworthy for a number of positive features. High productivity figures for cargo handling, good organisation by the port and the cargo handling contractors and a high standard of maintenance of port, equipment and appliances. It is an excellent natural harbour where most of the cargo is handled by lighterage."

"One of the most interesting aspects under discussion is the potential influence of the extension of deepwater berths and construction of sugar silos upon productivity of the port. Port management as well as cargo handling contractors are of the opinion that the investments in deep-water berths for cargo vessels would prove uneconomic since it would cause deterioration of present productivity figures and dispatch to general cargo vessels. Justification of the big investment in infra-structures is challenged in as much as the over-all cost of cargo handling, too, is not expected to be lowered in such manner. To maintain the present dispatch rate it is estimated that an addition of up to five deepwater berths would be required."

The quoted report was published in 1966, but the conclusions arrived at are still valid. The cargo production rate, with the existing system of cargo handled by lighterage, is high, ranging from 80/100 tons per day and gang for general cargo and to about 150 tons per gang and day for bagged goods.

The main channel is about 7,600 feet in length with an average width of about 600 feet. Ocean going ships are moored to buoys, laid each side of the inner part of the channel. The channel has a depth of not less than 32 feet at low water ordinary spring tides throughout its length. For large vessels, up to about 30,000 tons there is one berth in the outer channel. For medium size vessels, up to about 15,000 tons, there are 10 berths, including one deep water quay with a length of 500 feet. In addition there is one special berth for tankers and bunkering with a length of 750 feet and a minimum depth of 32 feet, and berths for small vessels. A new deepwater quay with a length of 400 feet and a minimum depth of 35 feet is being constructed and will be ready at the end of 1971.

In 1969 1,500 ships called at the port, carrying 615,000 tons of goods to Mauritius, of which about 55% general cargo and the remainder bulk commodities - mainly petroleum products. The cargo exported in 1969 was 760,000 tons, of which sugar and by-products 725,000 tons.

The great majority of the ships call at the port because of the services available such as bunkers, water, stores. In fact, only approximately 150 ships of present types and sizes per year would suffice to cater for the present trade of Mauritius, using the present methods and equipment.

The port dues and fees are generally considered reasonable with a view to the volume handled, as are the rates charged by the private dock and other service organizations.

The present organisation, methods and equipment are not only adequate for the actual relatively small quantities of general cargo handled, but have an additional potential, which could be utilised initially for additional traffic generated by free zone activities.

This unutilised capacity can be estimated to at least 150,000 tons per year. If and when bulk handling of sugar is introduced, a further capacity of 400,000 tons per year will be released, bringing the total capacity of general cargo handling up to about 900,000 tons, without any major investment in additional equipment. On the longer term technological developments as to ships and cargo handling will necessitate a transformation of the port, involving quay berth facilities for large vessels and mechanised cargo handling methods and equipment. A planned port development study will produce a phased development plan. Pending the conclusions of the study it

would seem reasonable to consider the potential of the present terminal facilities - complemented by provisional landing-piers for lighters in direct connection with a free zone area - sufficient to justify an immediate start of a free zone project, if otherwise deemed feasible.

Adjacent to the northern part of the port is an area covered with shallow water, named Mer Rouge, of approximately 250 acres, which, provided pending technical studies show that it can be reclaimed at reasonable cost, would form an ideal site for a free zone. It is immediately adjacent to the new deep-water quay referred to above and to the part of the port, which technical studies already made indicate as suitable for the development of quays and facilities for general cargo, and where provisional landing-pier for lighters could be constructed without difficulty (along Chaussée Tromelin).

Average depth to hard strata can be estimated to about 7 feet. Reclamation up to 4 feet above high water level, and providing a surface load carrying capacity sufficient for industrial building, can be estimated roughly to require about 18,000 cubic yard per acre at an approximate cost of Rs 7 per cubic yard. The total cost of reclamation can on these assumptions be calculated to approximately Rs 25 million (including 70 acres already reclaimed). The cost of development - roads, sewage, water, electricity etc. - can be estimated to about Rs 70,000 per acre, which would give a total of Rs 24.5 million.

Provisional landing piers for lighters and access roads can be estimated to roughly Rs 15 million. The total immediate investment needed - excluding land value - would consequently be around Rs 65 million. Assuming that one third of the area will be built with flatted factories and the rest with one storey buildings, this area could accommodate approximately 30,000 employees.

Transportation facilities

Regular cargo services exist to and from U.K. European continental ports, South Africa, Madagascar, East Africa, Far East, Australia and South America. The freight rates are at present generally high, due mainly to the small volumes involved. The Conference Lines rates will increase a further 12½% on October 1, 1970.

Due to the geographical position of Mauritius, on or close to the shipping routes between Europe/Africa and the East, it can already at this preliminary stage safely be assumed that adequate freight services will be available at reasonable rates, based on more attractive volumes generated by free zone operations. This is particularly evident as long as the Suez Canal remains closed. If and when it is re-opened, the potential of the transportation facilities may be negatively affected, although probably not to a prohibitive extent. The shipping industry has gradually adjusted its operations to the Cape route, which seems likely to retain much of its actual importance even in the eventuality of the re-opening of the Suez Canal.

The general freight rates will stay high and possibly even increase during an initial period of free zone operations. Past experience shows, however, that the shipping companies are prepared to negotiate special rates for individual shippers, based on specified quantities and periods. Particularly for outward freight the prospects of obtaining special, favourable rates, are good. As sugar is carried by tramps from Mauritius, the regular line ships, carrying imports to Port Louis as the last port of call on the run of general cargo vessels from Europe, leave Mauritius empty. Consequently there

is an immediately available potential for outward transportation. The possible introduction of a bulk terminal for sugar will entail the use of a smaller number of larger bulk carriers, calling at the port more regularly over a more extended period than is now the case. It may be possible to use these carriers systematically for inward freight at favourable rates.

One of the criteria used above for the selection of commodities, which have been preliminarily evaluated as feasible for free zone operations, is high value/volume-weight ratio. One reason for using this criterion is the obvious prospect of distributing finished products by air in the geographically limited market area, possibly by a fleet of Mauritian based freight aircraft. The present volume of air freight is very small, about 800 tons per year, and the terminal facilities for air cargo handling are not sufficient for a significant increase in air freight. The potential for air freight in connection with free zone activities is, however, likely to be considerable and will have to be evaluated, as well as the feasibility of a free zone, including an industrial area, adjacent to the international air port.

3. Summary of indications on the nature and direction of further studies

Concerning export manufacturing the customs barriers are negligeable and the customs concessions and other incentives are as liberal and far-going as possible. There is no need to consider the establishment of free zones for this purpose, unless existing facilities, contrary to reasonable expectations, fail to attract additional export industry to the extent required.

The volumes of trade in selected commodities in selected markets within the assumed regional marketing areas (see Tables I, II and IV) indicate a potential for free zones in Mauritius to function as regional distribution centres and/or as bases for sub-contracting operations. Other factors indicating such a potential are: abundant labour, adaptable to industrial technology and reasonably inexpensive; adequate terminal and transportation facilities both immediately available and offering a sufficient growth potential; an ideal area - provided it can be reclaimed at reasonable cost - adjacent to the port which can be developed into a free zone area.

Concerning sub-contracting operations in particular, for which the potential is likely to be considerable, it can be assumed that the freedom and flexibility of operation offered by free zones may constitute a powerful attraction as being highly consistent with the concept of international subcontracting in its various forms.

The following factors support the desirability of exploiting the indicated potential functions. Both types of operators involved offer the advantage of established trade marks and markets, which is of particular importance in the Mauritian context as no established markets exist for manufactures other than sugar and tea. Possibly interested foreign firms have ample financial resources of their own and can be assumed not to request far-going financial incentives. The operations involved, also those not directly industrial, are by character labour intensive. Infrastructure for industrial development remains to be provided for under all circumstances, if free zones are established or not. Therefore, only the additional investment caused by the establishment of free zones - mainly the higher cost of developing land in port areas - is directly relevant to the consideration of feasibility.

In general the weighing of the positive and negative factors determining feasibility must in the Mauritian context be made in the light of the imperative need of rapidly creating additional job opportunities in manufacturing, based on export markets. This also emphasizes the great importance of the time factor. The feasibility or not of free zones should be decided as speedily as possible and, if found feasible, a project in the port of Port Louis should be worked out in such a way that a first phase could get started within maximum 2 years. This seems possible. The cargo handling capacity reserve in the port seems to make possible the start of initial free zone operations with the construction only of provisional landing pier(s) for lighters and with the use, when completed in 1971, of the new West quay. This capacity will increase radically if and when bulk handling of sugar is introduced. Assuming that this may take place in approximately 3 years' time, it seems likely to coincide with major developments of free zone activities. The utilization for some years and for this purpose of existing lighterage equipment and manpower would also help neutralise the serious effects on employment of the introduction of bulk handling of sugar.

The reclamation and the development into industrial area of 250 acres (or such smaller area that may be found sufficient initially) could presumably be completed in two years, simultaneously with the building out of electricity and water generating facilities. The major and long term development of the port facilities, entailing heavy investments in the building of quays and mechanized cargo handling equipment eventually made necessary by technological developments in shipping and cargo handling could, provided these preliminary assumptions prove correct, be phased in a development plan after an initial period of free zone operations of 5-8 years.

With a view to the above preliminary conclusions the following further studies should be undertaken as a matter of priority, within the terms of the work plan established for the study:-

(i) Revise and complement identification and evaluation of commodities and markets for free zone function as regional distribution centre.

(ii) Revise and complement identification and evaluation of commodities and markets for free zone function as base for sub-contracting, partly combined with regional marketing.

(iii) Identify principal individual foreign manufacturers relevant to functions (i) and (ii).

(iv) Verify assumptions concerning initial reserve cargo handling capacity in the port in connection with the planned port development study.

(v) Estimate costs of initially required port development and of area required for free zone in the port, its cost of reclamation and development.

(vi) Estimate costs of other infrastructure required for establishing a free zone in the port on the assumptions indicated.

(vii) Estimate operational costs for a free zone in the port on the assumptions indicated.

(viii) Estimate the economic margin for additional incentives to be offered in the free zone, with a view to debt servicing requirements and to a reasonable rate of state revenue returns from free zone operations.

(ix) Estimate of possible excess of air cargo handling facilities at the international airport and preliminary estimate of costs for the construction of facilities and for the establishment of air cargo operations adequate for a volume of traffic assumed on the basis of investigations according to (i) and (ii) above.

(x) Draft prospectus concerning admission policy, incentives, lease rates, service rates and other conditions for free zone operations.

(xi) Consultations with prospective users identified according to (iii) above, in co-operation with existing Mauritian agents or representatives.

4. Comments on pending EXPORT PROCESSING ZONE facilities

The purpose of this report has been to review the basis prerequisites for the establishment of free zones as a customs concession in addition to other existing customs concessions. A free zone, whatever its specific purpose, is an administrative instrument of a customs technical nature and the evaluation of its feasibility or not has to be made primarily in that context and in relation to the character of the customs systems as a whole, including existing instruments with the same or similar purpose.

As it has been emphasized above, fiscal and other incentives and inducements are on principle added, not inherent, features, which can be applied equally within any system of customs concessions or even outside such systems. Consequently the form and extent of added incentives do not affect the basic evaluation of the feasibility of free zones.

In a later stage of the study will be determined what added incentives should be offered in order to maximize the attraction of free zones - if found feasible - in relation to the estimated economic margin for incentives, having regard to a reasonable rate of state revenue returns from free zone operations. In spite of the fact that the powerful inherent incentives of free zones would reduce the need to offer very extensive added incentives, the character of the incentives' package proposed for Export Processing Zone operators will affect the form and extension of added incentives required to attract free zone operators. On this basis the following comments on the Export Processing Zone scheme are offered.

4.1 The liberal "system of customs supervised factories" offered by the scheme is sound, and should be adequate for the purpose of encouraging export manufacturing in general. It has some distinct advantages compared to free zones:-

(a) operations can start immediately on a modest scale and develop gradually;

(b) reduced investment in industrial land development;

(c) possibilities to spread industrial establishment;

(d) provision of infrastructure facilitated, at least initially.

4.2 The presentation of the scheme as Export Processing Zone has no doubt a psychological value. It may, however, cause confusion and reduce the psychological impact of a possible introduction of free zones.

4.3 The basic concession of the scheme is exemption from import duties on machinery and equipment and from import and excise duties on raw and semi-finished materials going into exported manufactures. Category "A" operators enjoy the concession on the condition of a 100% export, category "B" operators on the condition of export of 20% only. In addition category "B" operators enjoy exemption from import duty for a period of three years on raw and semi-finished materials going into products manufactured for the local market. Consequently the relatively less important type of operators, category "B", is given more favourable terms than category "A" operators, as far as the basic concession is concerned. This appears inconsistent with free zone, including "export processing zone", concepts.

4.4 The proposed exemptions from existing labour legislation are inconsistent with both the purpose of the scheme and with the concepts of free zones or export processing zones. The possibilities suggested for the operators e.g. to require young persons and women to perform night work will reduce the employment rate. For reasons pointed out in the DRAFT REPORT, an incentive of this type should not be considered. On the contrary, there would be more reason to introduce safeguards against any possible development of practices potentially disturbing the overall social policies of the Government.

4.5 Apart from the objections raised in paragraphs 3 and 4, each suggested incentive taken separately is consistent with the purpose of the scheme and is of an internationally common character. The corporate income tax holiday is, however, very generous according to international standards particularly with a view to the fact that also dividends paid to shareholders are proposed to be exempted from income tax during the first 5 years. This latter incentive seems to be an addition to the incentives originally proposed. The complete list of incentives is very comprehensive. It would seem inadvisable to offer generally and automatically the complete package of incentives to each approved category "A" operator. It is therefore suggested that the legislation now being prepared should provide that, apart from the basic customs concessions, the incentives are individually subject to negotiations and will be granted to each applicant according to his needs and to the overall value of the project to the national economy. In addition it would be advisable for the same reason to specify that corporate income tax holiday may be granted for periods up to maximum 20 years, deleting the provision for a minimum period of 10 years. Such a flexibility appears indispensable particularly for the following reasons:-

(a) infrastructure is at present insufficient for any significant industrial development; until the requirements have been estimated and costed, and in connection therewith a margin has been determined as to revenue sacrifices in the form of incentives, it will be necessary to grant certificates under the scheme selectively according to strict performance norms;

(b) as Mauritius has no established export markets it will be necessary to attract operators with established markets; this means in general big business organizations with ample financial and other resources, able to operate with a minimum of incentives;

(c) if free zones are to be established it is important to be able to take advantage of the possibility of limiting incentives to a minimum; this would be difficult in the presence of a generally and automatically applied system of incentives within the Export Processing Zone Scheme.

4.6 The drafted legislation does not contain any provisions obliging Export Processing Zone operators to establish links with trade, industry and industrial services outside the scheme. This is consistent with the basic concept of freedom of operation. However, it is of great importance that a linkage is brought about, particularly with a view to the basic purpose of job creation. An instrument for this would be the performance norms applied in granting certificates. Also it would seem essential to enable suppliers of industrial accessories and services to benefit from, and thereby contribute to, the development of operations within the scheme by according to them the necessary customs facilities.

4.7 As mentioned above, processing or manufacturing is a basic condition for granting concessions under a system of "customs supervised factories". This condition is an essential part of the system. The exclusive purpose of the Export Processing Zone Scheme - export manufacturing - and the extensive incentives granted, makes it imperative to exclude any possibility for the operator to use the concession for any other purpose. The drafted legislation does not seem sufficiently strict in this respect. According to paragraph 5 of the draft bill "any manufactured article, substance, matter or other thing or the produce of deep sea fishing .... "could be declared an export product. The underlined words should be deleted. In paragraph 12(2)(a) and (b) there are general provisions permitting the removal from a bonded factory of materials, required by the export enterprise for the manufacture of export products, for the purpose of being exported and for consumption in Mauritius. Such operations are definitely inconsistent with the purpose of the scheme and should not be provided for in a general way in the law. They belong to other types of customs facilities such as bonded warehouses and free zones.

4.8 The specific purpose of the scheme and the extensive character of the incentives justifies very strict export performance norms, as have been proposed for category "A" operators. Although the basis for granting certificates should be, on principle, an undertaking of the operator to export his entire production, there should be possibilities to sell exceptionally on the Mauritian market when this is found to be in the interest of the national economy and subject to the ordinary import restrictions, duties and excise taxes applicable for products so sold. This could be the case for products, which otherwise have to be imported from abroad, and for products which could constitute inputs to industries outside the Export Processing Zone scheme. The draft legislation does not seem to include provisions for such developments. Although sales of this type on the Mauritian market may be of considerable value to the economy the type and scope of export enterprises granted certificates under category "A" should, of course, be such that the potential of the Mauritius Market would under all circumstances play only a minor role. The exceptional character of sales on the Mauritian market should be emphasised in the Bill. It would seem convenient to modify paragraph 9, which now reads as follows: "It shall not be lawful for an export enterprise to carry on, during its tax relief period, any trade or business other than in the export product specified in its certificate." The following modification is suggested: "It shall not be lawful for an export enterprise to carry on, during its tax relief period, any trade or business other than directly related to the manufacture and the export of the export products specified in its certificate. The Minister may however, if he considers it in the interest of the national economy, request or permit occasional sales of export products in Mauritius, subject to at the time of transfer from the bonded factory applicable import restrictions, import duties and excise taxes."

TABLE I

Annual imports of selected items to South Africa, 1967 and East Africa, 1968 from principal supplying countries only (in Million Rupees)

S.I.T.C.	Commodity	South Africa	Kenya Uganda Tanzania
541.1	Vitamins	3.1	1.1
541.3	Antibiotics	20.1	2.7
541.7	Medicaments	67.7	53.2
541.9	Med. wadding, gauze bandages	2.4	5.0
541.9.9	Other pharmaceutical goods	6.4	0.7
	Subtotal	99.7	62.7
	S.A. + E.A	162.4	
724.1	Television receivers	-	1.5
724.2	Radio receivers	11.0	11.7
891.1	Gramophones and record players	11.3	3.1
891.1	Tape recorders, dictating machines	-	9.9
891.119	Other sound reproducers	16.3	
	Subtotal	38.6	26.2
	S.A. + E.A	64.8	
724.9.1	Elec. line telephone and telegraph equipment	75.1	24.3
724.9.2	Microphones, loudspeakers etc.	10.0	2.5
724.9.9	Other telecommunications equipment	25.4	19.0
	Subtotal	110.5	45.8
	S.A. + E.A	156.3	
599.2.0.1	Disinfectants	2.6	1.7
599.2.0.3	Insecticides	11.1	15.6
599.2.0.4	Weed killers	10.0	3.0
599.2.02	Fungicides	8.0	9.0
	Subtotal	31.7	29.3
	S.A. + E.A	61.0	

S.I.T.C.	Commodity	South Africa	Kenya Uganda Tanzania
861.1	Optical elements	4.0	0.3
861.2	Spectacles and spectacle frames	6.0	0.9
861.3	Binoculars, microscopes and other instruments	5.9	1.1
861.4	Photographic cameras	25.4	3.5
861.5	Cinematographic cameras and projectors, etc.	10.5	1.4
	Subtotal	51.8	7.2
	S.A. + E.A	59.0	
861.7	Medical instruments	18.6	3.3
	Subtotal E.A. + E.A	21.9	
861.9	Controlling and scientific instruments N.E.S.	-	6.7
861.9	Surveying and measuring instruments	40.4	
	Subtotal S.A. + E.A	47.1	
714.1	Typewriters	10.0	4.0
714.2	Calculating and adding machines	40.0	7.5
714.9	Other office machines	10.3	1.1
	Subtotal	69.3	12.6
	S.A. + E.A	81.9	
714.3	Electronic data processing and other stat. machines	65.1	
725.0.1	Elec. domestic refrigerators	11.3	4.6
725.0.2	Elec. domestic washing machines	8.8	0.8
725.0.3	Elec. Vacuum cleaners	5.7	
725.0.3	Elec. room fans	5.1	0.8
725.0.3	Other electromechanical appliances	5.5	1.8
725.0.4	Elec. shavers	3.8	0.2
725.0.5	Elec. heating equipment	13.8	6.2
	Subtotal	54.0	14.4
	S.A. + E.A	68.4	
862.4	Film in rolls; sensitised, unexposed	12.6	5.0
	Subtotal S.A. + E.A	17.6	

S.I.T.C.	Commodity		South Africa	Kenya Uganda Tansania
894.2	Children toys		22.3	3.8
		Subtotal S.A. + E.A	26.1	
864.1	Wrist and pocket watches		36.1	2.1
864.2	Clocks		8.4	1.9
		Subtotal	44.5	4.0
		S.A. + E.A	48.5	
553	Perfumery, cosmetics, toilet preparations		5.5	6.4
		Subtotal S.A. + E.A	11.9	
962	Sugar confectionery		2.0	6.1
		Subtotal S.A. + E.A	8.1	
		TOTAL	648.1	230.2
		TOTAL S.A. + E.A	878.3	

TABLE II

Annual imports of selected items to Australia 1967 from principal suppliers only

S.I.T.C.	Commodity	Million Rs
541.10	Vitamins	6.5
541.30	Antibiotics	28.5
541.70	Medicaments	120.0
541.91	Wadding, gauze, bandages	7.8
541.99	Other pharmaceutical goods	1.2
	Subtotal	164.0
724.10.20	Television and radio receivers	14.6
891.11	Gramophones, tape recorders, etc.	22.6
	Subtotal	37.2
724.91	Elec. line telephone and telegraph equipment	37.3
724.92	Loudspeakers, microphones, etc.	4.0
729.99	Other teleocommunications equipment	110.6
	Subtotal	151.9
599.20	Insecticides, etc.	27.5
861.11	Lenses, prims and other optical elements, unmounted	5.2
861.21	Spectacles, spectacle frames	6.2
861.31	Binoculars, microscopes	10.9
861.50	Motion picture cameras etc.	11.7
	Subtotal	34.0
861.71.72	Medical, dental, surgical veterinary instruments	19.8
714.	Office machines (total import)	299.0
725.01	Elec. domestic refrigerators	16.5
725.02	Elec. domestic washing machines	4.7
725.03	Domestic electromechanical appliances	10.5
725.04	Elec. shavers, hairclippers	3.0
725.05	Elec. space heating equipment	1.7
	Subtotal	35.4
862.42	Films in rolls, sensitised unexposed	36.3
894.22	Children toys and dolls	27.8
864.	Watches, clocks	71.2
553.	Perfumery, cosmetics	6.3
	TOTAL	871.9

TABLE III

Export values 1967 of some groups of commodities with high labour content from Taiwan, South Korea, Hong Kong and Singapore

(in Million Rupees)

S.I.T.C.	Commodity Group	Taiwan	South Korea	Hong Kong	Singapore
65	Textile yarn and fabrics	463	272	1,270	225
724	Telecommunication apparatus (ind. radio, television receivers)	161	13	280	20
841	Clothing	259	328	2,138	89
851	Footwear	44	45	212	
893	Articles of artificial plastic	112		39	
894	Toys	36		532	
899.9.5	Wigs, etc.		126	183	
696.697	Cutlery, household equipment of base metal			114	
812.4	Lighting fixtures, fittings, parts			124	
831	Travel goods, handbags etc.			75	
814	Watches, clocks and parts			110	22
899.9.(3)	Artificial flowers etc.			265	
729.1	Batteries, accumulators				36
732	Road motor vehicles (assembly and parts)				181
	Principal buying countries (all commodities)				
		United States	United States	United States	West Malaysia
		Japan	Japan	United Kingdom	Vietnam Republic
		Vietnam Republic	Hong Kong	Japan	United States
		Hong Kong	Sweden	Indonesia	United Kingdom
		West Germany	Canada	West Germany	Japan
		Thailand	United Kingdom	Singapore	Hong Kong
		Canada	Vietnam Republic	Australia	East Malaysia
		Korea, Rep.	Thailand	Canada	Australia
		Singapore	West Germany	Thailand	France
		Indonesia	Singapore	Sweden	West Germany
		Netherlands	Netherlands	Netherlands	Netherlands
			Belgium	Taiwan	Italy
					South Africa

TABLE IV

Annual imports 1967 of selected commodity groups to markets which may be considered within a geographical marketing area for free zones in Mauritius

(in Million Rupees)

SITC Code	Commodity Group	Australia	South Africa	Iran	New Zealand	Kuwait	India	Nigeria	Pakistan	Zambia	Kenya	Sudan	Tanzania	Uganda	
653	Miscellaneous textile fabrics	347.9	535.9	101.1	168.2	37.1		106.2		36.2	41.5	25.7	17.8	28.1	1495.7
541	Medicinal and pharmaceutical products	225.2	134.2	249.9	91.1	28.1	129.6	85.6	94.9	26.5	27.1	23.1	15.9	11.4	1142.6
729	Other electrical machinery & apparatus excluding Elec. power machinery	280.3	291.4	133.7	120.0	108.9	180.0	66.0	100.0	47.0	20.0				1347.3
599	Chemical materials and products N.E.S.	246.4	192.6	173.7	60.4	36.7	111.7	35.4	124.6	6.9	31.8	36.0	11.1	2.5	1069.8
724	Telecommunications apparatus, incl. radio & TV receivers	277.3	219.6	58.7	62.6	97.5	109.2	65.6	59.0	8.4	24.7	16.3	15.5	9.1	1023.5
861	Scientific instruments	354.7	256.0	77.9	53.9	23.8	90.9	35.1	49.2	20.8	14.6	8.0	6.7		091.6
841	Clothing	154.1	194.3	4.1	16.6	155.2		71.5	0.6	30.0	13.6	23.2	5.5		668.1
851	Footwear					30.6		15.6		37.3	4.2	6.3	2.4	1.7	98.0
714	Office machines	301.2	186.6	24.2	69.3		39.4		14.3	17.1	10.1		3.4	1.7	667.3
862	Photographic and cinematographic supplies	83.6	61.5	20.4	20.7	7.8	50.0	10.0	10.3	2.1	5.0				271.4
725	Domestic electrical equipment	64.4	77.2	53.8		34.7		12.8		5.6	6.7	3.1	4.1	3.2	256.6
891	Musical instruments, phonographs etc.	123.8	73.6	10.6		16.2		20.0			6.2				250.4
864	Watches and clocks and parts	78.3	61.6		10.6	40.1	4.0	10.0	4.3	6.6	5.0				220.5
894	Toys etc.	117.1	57.6		14.8					6.5					196.2
553	Perfumery, cosmetics, dentifrices etc.					15.9				7.9	2.0		1.9	1.7	30.0
554	Soaps, cleaning and polishing preparations			6.4						7.8	2.9		7.7	1.6	26.4
062	Sugar preparations and confectionery					13.8				4.8			1.9		20.5
		2654.3	2342.3	914.5	688.2	696.3	714.8	533.8	457.2	271.5	215.4	141.7	93.9	61.0	9784.9

ANNEX C

Economic Planning Unit

Brief notes on free zone as base for regional marketing

A free zone is an area, physically separated from the customs area and regarded as foreign territory concerning the levying of customs duties and concerning the control of the movement of goods and transport media connected therewith. To this is normally added a relative, if not full, freedom from export and import and foreign exchange control. This permits to free zone users a flexibility of operation and a freedom from administrative control and red tape in general, which is the principal advantage and attraction of a free zone, whatever its specific purpose.

The function of a free zone is to facilitate and minimize the costs of all types of operations connected with international trade. It is here not possible to draw a clear line between the various commercial and industrial operations making up a complete marketing operation. The free zone function can be applied at any one phase of this operation, from the full manufacturing to the stockpiling and distribution only of products.

One important purpose of free zones is to provide a base for regional distribution of products, connected with manufacturing, part processing or manipulation. This may be of particular interest to suppliers of brand name commodities with established sales in a region divided in a number of separate markets. The principal region for a free zone in Mauritius - serving both the west-east and east-west trade flow - would comprise the markets in Southern and Eastern Africa and the land-locked markets adjacent to them, the neighbouring islands and the Persian Gulf markets. Another region - at least for the west-east trade flow - would comprise markets in the Far East, in particular Australia, New Zealand, India and Pakistan. The main advantages of a free zone when used as a distribution base can be summarised as follows:-

- It will not be necessary to maintain extensive inventories in each separate market, thus avoiding the always present risk of excess inventory for one market while shortages occur for another.

- Capital tied up in inventories can therefore be significantly reduced and capital allowed to turn over quicker.

- Coordinated sales supervision for a group of markets.

- Flexible stockpiling, i.e. orders can be quickly processed on the spot for a group of markets to fit current requirements to specific markets.

- Skilled clerical and manual labour at low cost for the operations involved, leading to substantial savings, particularly when any form of manipulation or processing is carried out.

- For commodities more regularly shipped by air, substantial savings in transportation costs when shipped in bulk by sea to the free zone and redistributed by air. Due to the much quicker turn-about of ships in a free zone, and subsequent lower costs to shipowners, favourable sea freight rates are possible. The greater volume of individual shipments (in bulk) to the free zone will have the same effect. Consequently the total transportation costs for commodities both received and distributed by sea may be equal to or even lower than for a direct delivery by sea to any individual market in the region.

With a view to the adaptability of Mauritian labour to industrial technology, and the very low labour costs compared to highly industrialized countries, suppliers in these countries of brand name commodities may find it attractive to add part-processing or full manufacturing to the free zone operations. In this case they may also effect considerable additional savings by buying locally produced materials, particularly packaging material In cases where the value added in Mauritius is considerable, say 50% or more, their products may have the advantage of the preferential tariff treatment in Australia for a number of products from developing countries, a system that is now expected to be adopted by all developed countries.

It is important to bear in mind that in cases where part processing or full manufacturing are found feasible, the possible scope of the free zone operations is not necessarily limited to the regional demands. Particularly if the operations constitute manufacturing under sub-contract or otherwise of components and products on behalf of manufacturers in highly industrialized countries, the manufactures of the free zone would be absorbed also in the industrialized countries themselves and in export markets outside the region.

It may finally be added that naturally also the distribution in Mauritius will benefit from being supplied from stocks in a free zone.

List of important suppliers of "brand name specialities" in Indian Ocean Area, represented in Mauritius

List of important suppliers of "brand name specialities" in Indian Ocean Area, represented in Mauritius

A. According to commodity groups

I. Pharmaceutical Supplies

Beecham Overseas Ltd.	Great West Road Brenford Middlesex Folsworth 5151 U.K.
Pharmaceutical Manufacturing Co. Ltd.	Ashley Works Ashley Road Epsom Surrey U.K.
Ethicon Ltd.	P.O. Box 408 Bankhead Avenue Edinburgh EH11 4HE SCOTLAND
Beechams Research Ltd.	Beecham House Great West Road Brentford Middlesex U.K.
Pfizer Ltd.	Sandwich Kent U.K.
Roussel Laboratories	Columbus House Wembly Park Middlesex U.K.
Burroughs Welcome & Co.	The Welcome Building Euston Road London N.W.1 U.K.
Crookes Laboratories Ltd.	Telford Road Houndmills Estate Basingstoke Hampshire U.K.
E.R. Squibb & Sons Ltd.	Reeds Land Moreton Wirral U.K.
Organon Laboratories Ltd.	Gown House London Road Mordon Surrey U.K.
Riker Laboratories Ltd.	Morely Street Loughborough Leicestershire U.K.

Smith & Nephew Ltd.	Bessemer Road Welwyn Garden City Hertfordshire U.K.
British Drug House Ltd.	Laboratory Chemical Division Poole Dorset U.K.
Distillers Co.	12 Torpichen Street Edinburgh EH3 8YT SCOTLAND
E.C. de Witt & Co. Ltd.	Seymour Road LONDON E.10 U.K.
G.D. Searle & Co.	Lane End Road High Wycombe Bucks U.K.
Imperial Chemical Industries Pharmaceutical Division	Alderley House Alderley Park Macclesfield Cheshire U.K.
Johnson & Johnson (Great Britain Ltd.	Slough Bucks U.K.
Reckitt & Colman (Overseas) Ltd.	Hull Horkshire U.K.
Boots Pure Drug Co. Ltd.	Nottingham NG2 3AA U.K.
Cyanamid of Great Britain Ltd.	Bush House Aldwych London W.C.2 U.K.
Griffin & George Ltd.	Ealing Road Alperton Wembley Middlesex HA0 1HJ U.K.
J. Glover Distributors (Pty) Ltd.	Talavera Road North Ryde P.O. Box 104 North Ryde U.K.
Laporte Industries Ltd.	P.O. Box 8 Luton Bedfordshire U.K.
Ortho Pharmaceuticals Ltd.	Saunderton Bucks U.K.

Roche Products Ltd.	15 Manchester Square London W.1 U.K.
Ward Blenkinsop & Co. Ltd.	Fulton House Empire Way Wembley U.K.
Wright Dental Co. Ltd.	Industrial Estate Kingsway West Dundee SCOTLAND
Vick International Division of R-M Pharmaceuticals (Pty) Ltd.	P.O. Box 456 Kempton Park SOUTH AFRICA
Parke & Davis Laboratories	P.O. Box 24 Isando Transvaal SOUTH AFRICA
Sterling Drug International	P.O. Box 942 Nairobi KENYA
Farben Fabrieken Bayer A.G.	Leverkusen WEST GERMANY
Scherling A.G.	1 Berlin 65 Postfach, 65-03-11 WEST GERMANY
Farbwerke Hoechst A.G.	Vormals Meister Lucius & Bruning Uborsee 6230 Frankfurt (M) WEST GERMANY
Sandoz Laboratories	14 Boulevard Richelieu 92 Reveil Malmaison FRANCE
Omnechanges S.A.	80 Rue Taitbout Paris 9eme FRANCE
Ciba - Geigy Ltd.	Rosental P.O. Box CH - 4002 Basle SWITZERLAND
Ames Company Limited	P.O. Box 203 Springvale 3171 Victoria AUSTRALIA
Miles Laboratories Ltd.	P.O. Box 203 Springvale 3171 Victoria AUSTRALIA
Eli Lilly S.A.	P.O. Box 11667 Fernandez Juncos Station San Juan PUERTO RICO

Wulfing Chemical Products Ltd.	Oosteinde 1 Amsterdam C HOLLAND

II Insecticides, Pesticides and Weed Killers

Kiwi Ltd.	Brunswick Road Ealing London W.5 U.K.
Airwick (Horlick) Ltd.	11 Slough Bucks U.K.
Fisons Products	Agrochemical Division Export Sales Dept. Harston Cambridge CB25H4 U.K.
May and Baker Ltd.	Dagenham Essex U.K.
Plant Protection Ltd.	Bolton House 61 Curzon Street London W.1 U.K.
Sandoz	Sandoz Products Ltd. Sandoz House 23 Great Castle St. London W.1 U.K.
Shell Chemicals U.K. Ltd.	Shell Centre Downstream Building London S.E.1 U.K.
Sofex (London) Ltd.	159 Victoria Street London S.W.1 U.K.
Murphy Chemicals	Wheathampstead St. Albans Hertfordshire U.K.
Universal Crop Protection	U.K.
Farbwerke Hoechst A.G.	Farbwerke Hoechst A.G. 6000 Frankfurt/Main 70 GERMANY
B A S F - Badische Anilin & Soda Fabrik A.G.	Ludwigshafen Am Rhein FEDERAL REPUBLIC OF GERMANY
Farben Fabriken Bayer A.G.	Leverkusen FEDERAL REPUBLIC OF GERMANY

Solo Kleinmotoren GmbH (spraying equipment)	7034 Maichigen bei Stuttgart FEDERAL REPUBLIC OF GERMANY
Pechiney Progil	B.P. 139 69 Lyon B.P. FRANCE
M.V. Chemische Industries Denka	Denka Chemie N.V. Voorthuizen HOLLAND
Aseptafabriek N.V.	Delft HOLLAND
Du Pont de Nemours	Wilmington 98 Delaware U.S.A.
Monsanto Chemicals Ltd.	UNITED STATES
Rohm & Haas & Co.	Independence Mall West Philadelphia P.A. 19105 U.S.A.
Toyo Menka Kaisha Ltd. (spraying equipment)	Central P.O. Box 61 Osaka JAPAN

III Radio & Television Sets, Sound Recording & Reproducing Equipment

Reditune Ltd.	Cray Avenue 2, Orpington Kent U.K.
Radiomobile Ltd.	Cricklewood Works London N.W.2 U.K.
Ekco Export Ltd.	Southend-on-Sea Essex U.K.
Ekco Radio & Television Ltd.	Southend-on-Sea Essex U.K.
Pye Ltd.	St. Andrew's Road Cambridge U.K.
Rank Organization Bush Murphy Division	Power Road Chiswick London W.4 U.K.
TELEFUNKUN	FEDERAL REPUBLIC OF GERMANY
Radio Corporation of America	224, Rue du l'Ieuvre Geneva SWITZERLAND

N.V. Philips	Eindhoven HOLLAND
NATIONAL	JAPAN
SANYO	JAPAN
AKAI	JAPAN
SONY	JAPAN
Waltham Electronics Ltd.	Dublin 8 REPUBLIC OF IRELAND
Bush Murphy Export Ltd.	Shanawen Road Whitehall Dublin 9 IRELAND

IV Office Equipment (Except Furniture)

Art Metal Inc.	199/903 Buckingham Palace Road London S.W.1 U.K.
Blick Time Recorders Ltd.	44/46 Sickfold Street London C.1 U.K.
Chubb & Sons Lock & Safe Co.	Tottenham Street London W.1 U.K.
Gestetner Ltd.	Fawlay Road London N.17 U.K.
Twinlock Ltd.	86a Station Road West Wickam Kent U.K.
Pitney Howes Ltd.	Harlow Essex U.K.
Varityper Inc.	Vari-typer Ltd. Cleveland Road Hemel Hampstead Heaths U.K.
The Shannon Ltd.	Tamworth TW 2069 U.K.
Imperial Typewriter Co. Ltd.	East Park Road Leicester U.K.
Paillard S.A. (Hermes Typewriters)	1401 Yverdon SWITZERLAND

Addressograph - Multrigraph	Cleveland UNITED STATES
National Cash Register Co. Ltd.	Dayton 9 Ohio UNITED STATES
S.C.M. Deutchland Gmbh	SCM International S.A. 30 Rue Joseph 2 Bruxelles 1040 BELGIQUE
Facit	Facit AB Export Dept. S-103 Stockholm 7 SWEDEN

V. Electrical Appliances (Mainly Household)

Atlas Lighting Ltd.	Upper Street Martin Lane London W.C.2
Hoover	Western Avenue Perivale Greenford Middlesex U.K.
General Electric Company	U.K.
Antar Air Conditioners	U.K.
Belling & Co. Ltd.	Bridgeworks Southberry Road Enfield Middlesex U.K.
British Domestic Appliances International Ltd. (merged with GEC)	U.K.
Ekco Electronics Ltd.	Southend-on-Sea Essex U.K.
Pye Engineering Services Ltd.	80 Newmarket Road Cambridge U.K.
Pye Process Heating	Abbey Walk Cambridge U.K.
Kelvinator Int. Corp.	New Chester Road Bromborough Cheshire U.K.
The English Electric Co. Ltd.	English Electric House Strand London W.C.2 U.K.
Henry Gardner & Co. Ltd.	143 Royal Exchange Manchester 2 U.K.

Simplex Electric Co. ("Creda")	Blythe Bridge Stoke-on-Trent Staffs U.K.
Radiation International Ltd.	Radiation House North Circular Road London N.W.10 U.K.
Santon Ltd.	Somerton Works Mon U.K.
Hawker Siddeley Electric	Crompton House Aldwych London W.C.2 U.K.
A.E.G. - Allgemeine Elektricitets Gesellschaft	6 Frankfurt Main S.10 FEDERAL REPUBLIC OF GERMANY
B O S C H	FEDERAL REPUBLIC OF GERMANY
Telemecanique Electrique	FRANCE
Sunbeam Electric Ltd.	5, Gibelstrasse Jourb SWITZERLAND
N.V. Philips	Eindhoven HOLLAND
Weatherite Air Conditioners	U.S.A.
Norge Refrigerators	Washington Appliance Wholesaler Inc. 10501 Ewing Road Beltsville U.S.A.
General Motors Ltd.	General Motors Distribution Corp. 767 Fifth Avenue New York N-Y 10022 U.S.A.
Trane	Trane S.A. La Crosse Wisconsin U.S.A.
Usha International	4 B-Rani Jhansi Road New Delhi 55 INDIA
Brcele Marelli & Co.	ITALY

VI.	Photographic Equipment and Supplies	
	Kodak	Kodak Ltd. Kingsway London U.K.
	AGFA-GEVAERT A.G.	FEDERAL REPUBLIC OF GERMANY
	ASAHI PENTAX	JAPAN
	Canon Camera Co. Inc.	P.O. Box NO50 Tokyo International Air Port Tokyo JAPAN
VII.	Clocks and Watches	
	Rolex Watch Co. Ltd.	Heathend Road Bexley Kent Crayford U.K.
	Rolex Montres S.A.	Rue du Marche Geneva SWITZERLAND
	Longines	Longines Compagnie des Montres Francillon S.A. Berne SWITZERLAND
	Jaeger - Le Coultre (Vacheron Constantin)	1, Rue des Moulins 1211 Geneve, 11 SWITZERLAND
	Omega	SWITZERLAND
	Oris	SWITZERLAND
	Tissot	SWITZERLAND
	Certina	SWITZERLAND
	Junghans	SWITZERLAND
	Hattori Trading Co. Ltd.	M/S Hattori Trading Co. Ltd. 5-11, 4-Chome Ginsa, Chuo-ku Tokyo JAPAN
	RICOH	JAPAN
VIII.	Cosmetics and Perfumery	
	Coty Limited	Great West Road Brentford and 239 St. Vincent Street Glasgow, SCOTLAND

Yardley (Subsidiary of International Tobacco Co.)	Yardley of London Ltd. 33 Old Bond Street London W.1 U.K.
Cussons	Cussons & Sons Co. Ltd. Soap Manufactures Kersal Vale Manchester 7 U.K.
Max Factor	P.O. Box 3 Bournemouth U.K.
Bristol - Myers (Pty) Ltd.	Stonefield Way Victoria Road South Ruislip Middlesex U.K.
"4711"	Cologne FEDERAL REPUBLIC OF GERMANY
Diparco (Houbigant)	141 Avenue du Roule 92 Neuilly/Seine B.P. 137 FRANCE

IX. Chocolate and Sweets

Edward Sharpe & Sons	Trebor - Sharpe Ltd. Trebor House Woodford Avenue Illford Essex U.K.
Cadburry - Fry	Cadbury Bros. Ltd. Bournville Birmingham 30

X. Sundry Suppliers

Ball Bearings

S K F	Gothenburg SWEDEN

Transportation Equipment

Vespa	ITALY

Medical Instruments

SIEMENS	FEDERAL REPUBLIC OF GERMANY

Radio Communications

Pye Telecommunications Ltd.	Newmarket Road Cambridge U.K.

Conglomerate

British Ropes Ltd.	Farnsworth Hall Doncaster U.K.

Components

British Insulated Callender's Cables Ltd.	21 Bloomsbury Street London W.C.1 U.K.

B. According to representatives in Mauritius

1. Blanche Birger & Co. Ltd.

Radio & Television Sets, Sound Recording & Reproducing Equipment

Radio Corporation of America (Television Sets)	224, Rue de L'Ieuvre Geneva SWITZERLAND
Waltham Electronics Ltd. (Radios)	Long ha Dublic 8 REPUBLIC OF IRELAND
Reditune Ltd. (Recording Equipment)	Cray Avenue 2, Orpington Kent U.K.

Office Equipment (Except Furniture)

Addressograph - Multrigraph	Cleveland UNITED STATES
Art Metal Inc.	199/903 Buckingdam Palace Road London S.W.1 U.K.
Blick Time Recorders Ltd.	44/46 Sickfold Street London C.1 U.K.
Chubb & Sons Lock & Safe Co.	Tottenham Street London W.1 U.K.
Gestetner Ltd.	Tawlay Road London N.17 U.K.
National Cash Register Co. Ltd.	Dayton 9 Ohio UNITED STATES
Twinlock Ltd.	86a Station Road West Wickam Kent U.K.
Pitney Bowes Ltd.	Harlow Essex U.K.

Varityper Inc.	Vari-typer Ltd. Cleveland Road Hemel HAMSTEAD HEATH U.K.

Electrical Appliances (Household)

Atlas Lighting Ltd.	Upper Street Martin Lane London ,C.2 U.K.
Sunbeam Electric Ltd.	5, Gibelstrasse Jourb SWITZERLAND
Weatherite Air Conditioners	

Clocks and Watches

Jaeger - Le Coultre (Vacheron Constantin)	1, Rue des Moulins 1211 Geneve, 11 SWITZERLAND

2. Blyth Brothers & Co. Ltd.

Pharmaceutical Supplies

Ance Company Limited	P.O. Box 203 Springvale 3171 Victoria AUSTRALIA
British Drug House Ltd.	Laboratory Chemical Division Dorset U.K.
Distillers Co. (Malt Products Ltd.)	12 Torpichen Street Edinburgh EH3 8YT SCOTLAND
D.C. de Witt & Co. Ltd.	Seymour Road London E.10 U.K.
G.D. Searle & Co.	Lane End Road High Wycombe Bucks U.K.
Imperial Chemical Industries Pharmaceutical Division	Alderley House Alderley Park Macclesfield Cheshire U.K.
Johnson & Johnson (Great Britain Ltd.)	Slough Bucks U.K.

Parke & Davis Laboratories (Pty) Ltd.	P.O. Box 24 Isando Transvaal SOUTH AFRICA
Miles Laboratories Ltd.	P.O. Box 203 Springvale 3171 Victoria AUSTRALIA
Reckitt & Colman (Overseas) Ltd.	Hull Yorkshire U.K.
Boots Pure Drug Co. Ltd.	Nottingham NG2 3AA U.K.
Cyanamid of Great Britain Ltd.	Bush House Aldwych London W.C.2 U.K.
Eli Lilly S.A.	P.O. Box 11667 Fernandez Junooe Station San Juan PUERTO RICO
Griffin & George Limited	Ealing Road Alperton Wembley MIDDLESEX HAO 1HJ U.K.
J. Glover Distributors (Pty) Ltd.	Talavera Road North Ryde P.O. Box 104 North Ryde U.K.
Laporte Industries Ltd.	P.O. Box 8 Luton Bedfordshire U.K.
Ortho Pharmaceuticals Ltd.	Saunderton Bucks U.K.
Cumschanges S.A.	80 Rue Taitbout Paris 9eme FRANCE
Roche Products Limited	15 Manchester Square London W.1 U.K.
Ward Blenkinsop & Co, Ltd.	Fulton House Empire Way Wembley U.K.
Wright Rental Co. Ltd.	Industrial Estate Kingsway West Dundee SCOTLAND

Wilfing Chemical Products Ltd.	Oosteinde 1 Amsterdam C HOLLAND

Radio & T.V. Sets, Sound Recording & Reproducing Equipment

N.V. Philips	Eindhoven HOLLAND

Insecticides, Pesticides & Weed Killers

May and Baker Ltd.	Dagenham Essex U.K.
Plant Protection Ltd.	Bolton House 61 Curzon Street London W.1 U.K.
Sandoz	Sandoz Products Ltd. Sandoz House 23 Great Castle Street London W.1 U.K.
Shell Chemical Company of Eastern Africa Ltd.	Shell Chemicals U.K. Ltd. Shell Centre Downstream Building London S.E.1 U.K.
Sofex (London) Ltd.	Sofex (London) Ltd. 159 Victoria Street London S.W.1 U.K.

Conglomerate

British Ropes Ltd.	Wamsworth Hall Doncaster U.K.

Components

British Insulated Callender's Cables Ltd.	21, Bloomsbury Street London W.C.1 U.K.

Refrigerators

N.V. Philips	Eindhoven HOLLAND
Kelvinator Int. Corp.	New Chester Road Birkenhead Cheshire U.K.

Electrical Appliances (Household)

The English Electric Co. Ltd.	English Electric House Strand London W.C.2 U.K.
Henry Gardner & Co. Ltd.	143 Royal Exchange Manchester 2. U.K.
N.V. Philips	Eindhoven HOLLAND
Kelvinator Int. Corp.	New Chester Road Bromborough Cheshire U.K.
Simplex Electric Co.	Blythe Bridge Stoke-on-Trent Staffs U.K.
Radiation International Ltd. (Cookers)	Radiation House North Circular Road London N.W.10 U.K.
Santon Ltd. (Water Heaters)	Somerton Works Mom U.K.

Cosmetics and Perfumery

Bristol - Myers (Pty) Ltd.	Stonefield Way Victoria Road South Ruislip Middlesex U.K.
Diparee (Houbigant)	141 Avenue du Roule 92 Neuilly/Seine B.P. 137 FRANCE

3. Chunilal Jeevanlal & Co. (Mauritius) Ltd.

Electrical Appliances (Household)

Usha International	Messrs. Usha Intl., 4 B-Rani Jhansi Road New Delhi 55 INDIA

Clocks and Watches

Hattori Trading Co. Ltd. (Seiko)	M/S Hattori Trading Co. Ltd., Swil, 4-Chome Ginza, Chuo-Ku Tokyo JAPAN

4. Dóser de Speville & Co. Ltd.

Insecticides, Pesticides & Weed Killers

N.V. Chemische Industrieën Denka	Denka Chemie N.V. VOORTHUIZEN HOLLAND

Refrigerators

General Motors Limited General Corporation	General Motors Distributors Corporation 767 Fifth Avenue New York N-Y 10022 U.S.A.

Electrical Appliances (Household)

A.E.G.	Allgemeine Elektricitats Gesellschaft AEG Telefunken 6 Frankfurt Main S.10 WEST GERMANY
Belling	Belling & Co. Ltd. Bridgeworks Southberry Road Enfield Middlesex U.K.
British Domestic Appliances Ltd.	British Domestic Appliances Int. Ltd. Peterborough U.K.
General Motors Ltd.	General Motors Distribution Corp. 767 Fifth Avenue New York N-Y 10022 U.S.A.
Trane	Trane S.A. La Crosse Wisconsin U.S.A.

5. Dynamotors Ltd.

Electric Appliances

Telemecanique Electrique	FRANCE

6. Ehrahim Dawood Ltd.

Photographic Equipment and Supplies

Canon Camera Co. Inc.	P.O. Box M050 Tokyo International Air Port Tokyo, JAPAN

Electrical Appliances (Household)

Ekco Ltd.	Ekco Electronics Ltd. Southend-on-Sea Essex U.K.
	Ekco Export Ltd. Southend-on-Sea Essex U.K.
	Ekco Radio & T.V. Ltd. Southend-on-Sea Essex U.K.
Pye Ltd.	Pye Engineering Services Ltd. 80 Newmarket Road Cambridge U.K.
	Pye Ltd. St. Andrew's Road Cambridge U.K.
	Pye Process Heating Abbey Walk Cambridge U.K.
	Pye Records (Sales) Ltd. 132 Western Road Mitcham Surrey U.K.
	Pye Telecommunication Ltd. Newmarket Road Cambridge U.K.

Cosmetics and Perfumery

Christian Dior	13, Rue Francoisler Paris 8e FRANCE
Carven	3, Rue de Stockholm Paris 9e FRANCE
Consortium Mediterranean de Parfumerie	MONACO

7. Electric & Motor Car Co. Ltd.

Electrical Appliances (Household)

Ercole Marelli & Co.	ITALY

8. Roger Payd'herbe & Co. Ltd.

Radio & T.V. Sets, Sound Recording & Reproducing Equipment

Bush Murphy T.V.	Bush Murphy Export Ltd. Shanawen Road Whitehall Dublin 9 IRELAND
Bush Murphy Radio	Rank Organization Bush Murphy Division Power Road Chiswick London W.4 U.K.

Insecticides, Pesticides & Weed Killers

Du Pont de Nemours	Wilmington 98 Delaware U.S.A.
B A S F	Badische Anilin & Soda Fabrik A.G. Ludwigshafen A M Rhein Girokonto 51/82 GERMANY
Bayer	Farben Fabriken Bayer A.G. Verkauf Pflanzenschutz Leverkusen GERMANY
Aseptafarbriek	Aseptafabriek N.V. Chemical Products Delft HOLLAND
Murphy Chemicals	Wheathampstead St. Albans HERTFORDSHIRE U.K.
Rohm & Haas & Co.	Independence Mall West Philadelphia P.A. 19105 U.S.A.
Solo Kleinmotoren GmbH (Spraying equipment)	7034 Maichigen bei Stuttgart WEST GERMANY
Toyo Menka Kaisha Ltd. (Spraying equipment)	Central P.O. Box 61 Osaka JAPAN

9. Hall Geneve Langlois Ltd.

Insecticides, Pesticides & Weed Killers

Farbwerke Hoechst AG	Farbwerke Hoechst AG 6000 Frankfurt Main 70, GERMANY

Pechiney Progil	B.P. 139 69 Lyon R.P. FRANCE

Office Equipment (Except Furniture)

S.C.M. Deutschland GmbH	SCM International SA 30 Rue Joseph 2 Bruxelles 1040 BELGIQUE
Paillard S.A. (Hermes Typewriters)	1401 Yverdon SUISSE

Electrical Appliances (Household)

Antar Air Conditioners	
Norge Refrigerators	Washington Appliance Wholesaler Inc. 10501 Ewing Road Beltsvie U.S.

10. Ireland Fraser & Co. Ltd.

Insecticides, Pesticides & Weed Killers

Fisons Products	Agrochemical Division Export Sales Department Harston Cambridge CB25H4 U.K.

Photographic Equipment and Supplies

Kodak	Kodak Ltd. Kingsway London U.K.

11. Robert le Maire Ltd.

Office Equipment (Except Furniture)

The Shannon Ltd.	George Street Walsall (TA Shannon; TN 28305) & Leitfield St. Tamworth TN 2069 U.K.
Imperial Typewriter Co. Ltd.	East Park Road Leicester U.K.

12. Harel Mallac & Co. Ltd.

Office Equipment (Except Furniture)

Facit	Facit AB Export Dept. S-105 Stockholm 7 SWEDEN

Electrical Supplies (domestic and others)

General Electric Company	U.K.

13. Roger Mamet & Fils

Cosmetics and Perfumery

"4711"	Cologne GERMANY

14. Morison Son & Jones (Mauritius) Ltd.

Pharmaceutical and Medical Supplies

Burroughs Welcome & Co.	The Welcome Building Euston Road London N.W.1 U.K.
Crookes Laboratories Ltd.	Telford Road Houndmills Estate Basingstoke Hampshire U.K.
E.R. Squibb & Sons Ltd.	Reeds Land Moreton Wirral U.K.
Farbwerke Hoechst A.G.	Vormals Meister Lucius & Bruning 'Verkauf Arneimittel' - Ubersee 6230 Frankfurt (M) GERMANY
Ciba - Geigy Ltd.	Rosental Kad Ph 6 P.O. Box CH - 4002 Basle SWITZERLAND
Organon Laboratories Ltd.	Gown House London Road Morden Surrey U.K.
Riker Laboratories Ltd.	Morley Street Loughborough Leicestershire U.K.
Smith & Nephew Ltd.	Bessemer Road Welwyn Garden City Hertfordshire U.K.
Vick International Division of R-M Pharmaceuticals (Pty) Ltd.	P.O. Box 456 Kempton Park SOUTH AFRICA

Ethicon Ltd.	P.O. Box 408 Bankhead Avenue Edinburg EH11 4HE SCOTLAND
Sterling Drug International	P.O. Box 942 Nairobi KENYA

Insecticides, Pesticides & Wood Killers

Kiwi Ltd.	Brunnswick Road Ealing London W.5 U.K.

Cosmetics and Perfumery

Max Factor	P.O. Box 3 Bournemouth U.K.

15. Pharmacie Nouvelle Ltee

Pharmaceutical Supplies

Bayer	Leverkusen WEST GERMANY
Beechams Research Ltd.	Beecham House Great West Road Brentford Middlesex U.K.
Pfizer Ltd.	Sandwich Kent U.K.
Roussel Laboratories	Columbus House Wembly Park Middlesex U.K.
Sandoz Laboratories	14 Boulevard Richelieu 92 Reveil Malmaison FRANCE
Scherling A.G.	1 Berlin 65 Postfach, 65-03-11 GERMANY

Cosmetics and Perfumery

Coty Limited	Great West Road Brentford and 239 St. Vincent Street Glasgow U.K.

Chocolate and Sweets

Edward Sharps & Sons	Trebor - Sharps Ltd. Trebor House Woodford Avenue, Illford Essex, U.K.

16. Rey & Lenferna Ltd.

Radio & T.V. Sets, Sound Recording & Reproducing Equipment

Radiomobile Ltd. (Car Radios only)	Cricklewood Works London N.W.2 U.K.

17. Rogers & Co. Ltd.

Pharmaceutical Supplies

Pharmaceutical Manufacturing Co. Ltd.	Ashley Works Ashley Road Epsom Surrey U.K.

Insecticides, Pesticides & Weed Killers

Monsanto Chemicals Ltd.	UNITED STATES

18. Scott & Co. Ltd.

Pharmaceutical Supplies

Beecham Overseas Ltd.	Great West Road Brentford Middlesex Cables, Beechover Hoernslow Folsworth 5151 U.K.

Insecticides, Pesticides & Weed Killers

Airwicks (Horlicks) Ltd.	Airwick Ltd. Bucks U.K.

Refrigerators

Hoover	Western Avenue Perivale Greenford Middlesex U.K.

Clocks and Watches

Rolex	Rolex Watch Co. Ltd. Heathend Road Bexley Kent Crayford U.K. Rolex Montres S.A. Rue du Marche Geneva SWITZERLAND

Longines	Longines Compagnie des Montres Francillon S.A. St. Mier Berne SWITZERLAND

Cosmetics and Perfumery

Yardley (Subsidiary of International Tobacco Co.)	Yardley of London Ltd. 33 Old Bond Street London W.1 U.K.
Cussons	Cussons & Sons Co. Ltd. Soap Manufactures Kersal Vale Manchester 7 U.K.

Chocolate and Sweets

Cadbury - Fry	Cadbury Bros. Ltd. Bournville Birmingham 30 U.K.

19. Forges Tardieu Ltd.

Radio & T.V. Sets, Sound Recording & Reproducing Equipment

Pye Telecommunications Ltd. (Radio Communication)	Newmarket Road Cambridge U.K.

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ANNEX E

Registration of WORKING PAPERS - RUNE ULFSAX - UNIDO

Planning and Programming Adviser (industry and related infrastructure) to the MINISTRY OF ECONOMIC PLANNING AND DEVELOPMENT, MAURITIUS, June 1970 - December 1973
(Contained in 7 Foolscap ring files)

A. Development Plan drafts

B. Basic Data and Assumptions

C. Strategy. Policy. Programming

D. Production factors (including employment) and Incentives

E. Industrial land and water

F. Electricity

G. Port and shipping

H. Air port and air transport

I. Free Zones

J. Industrial training and mangement consultancy and training

K. Local market and production for local market
Commerce - Banking and credit

L. National economy

M. Selection of industries, products and markets

NO. International trade, policy, agreements, export promotion

PQ. Small scale industry

R. Evaluation individual projects and evaluation methods

S. General education

T. Tourism

U. Mer Rouge

V. Follow up activities

Z. Not specified

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