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INDUSTRIAL INFORMATION SERVICE UNIT

TS/YEM/75/001

YEMEN ARAB REPUBLIC

Mission report

Prepared for the Government of the Yemen Arab Republic
by the United Nations Industrial Development Organization

Based on the work of Bertil H. L. Kuhleman, UNIDO consultant

Id. 77-6199

Explanatory notes

The monetary unit of the Yemen Arab Republic is the Yemen rial (YRls). During the period covered by the report, the value of the Yemen rial in relation to the United States dollar was \$US 1 = YRls 4.55.

A full stop is used to indicate decimals.

A comma (,) is used to distinguish thousands and millions.

The following abbreviations of organizations are used in this report:

CPO	Central Planning Office
FID II	Second Committee of the Fédération internationale de documentation
IDA	International Development Association
IDCAS	Industrial Development Centre for Arab States
IISU	Industrial Information Service Unit
IPAU	Industrial Promotion and Advisory Unit

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ABSTRACT

The present report concerns a one-month preparatory mission to the Yemen Arab Republic on the Establishment of an Industrial Information Service Unit (IISU) within the Department of Economy (TS/YEM/75/001/09) by an industrial information specialist in July and August 1977 for the United Nations Industrial Development Organization (UNIDO).

It was found that the establishment of such an information service would be advisable, and a three-phase programme for doing so was elaborated, with emphasis on the first, or organizational, phase.

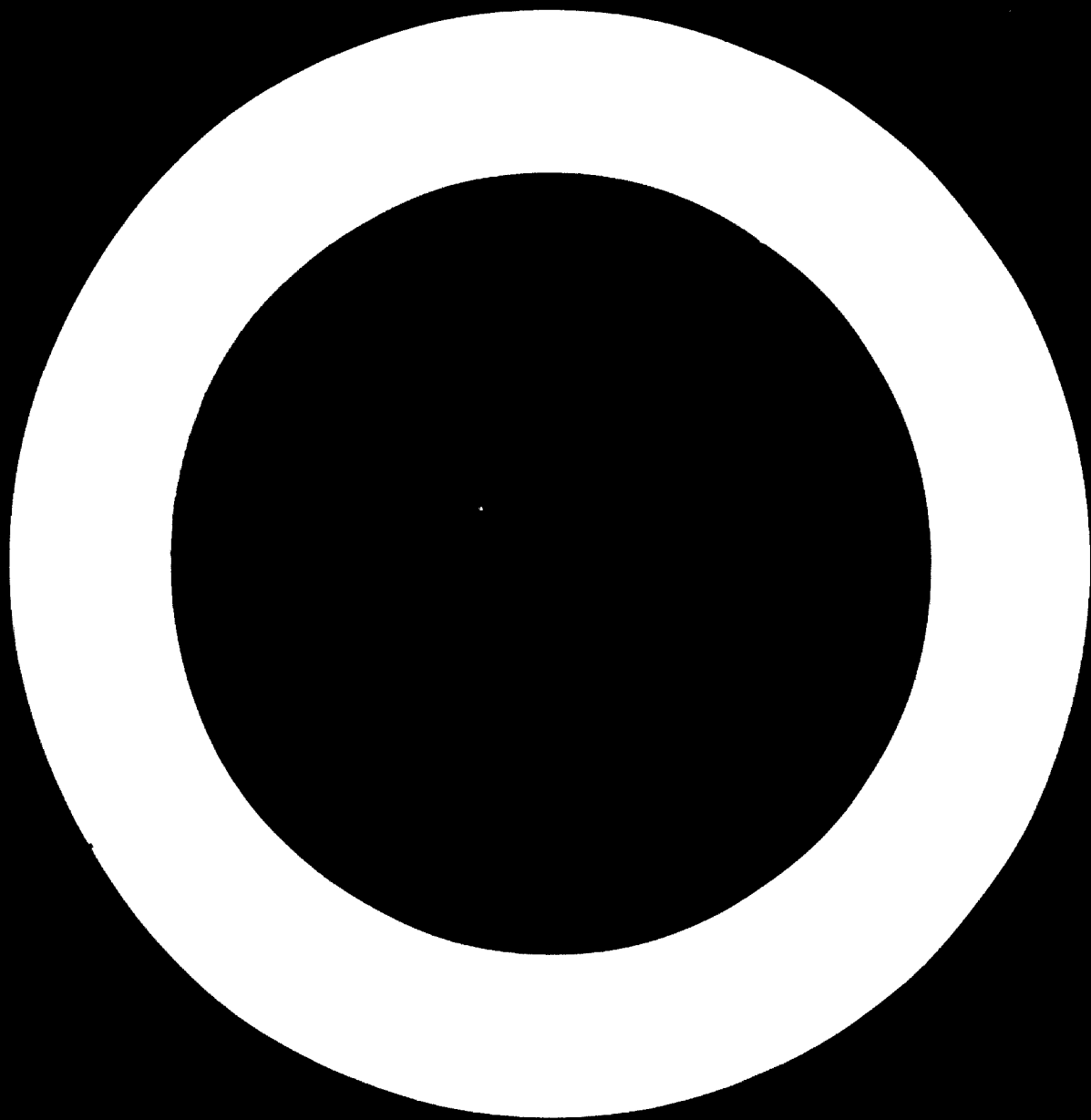
The work of the IISU is recommended to encompass the following three principal functions:

Extension services, in the form of visits to industrial establishments and governmental bodies to acquire and transmit information

A question-and-answer service to provide information in forms usable to inquirers within industry and government

Publication of a quarterly news-letter to maintain contact with the users of IISU and inform them of developments in various industrial fields.

A most important aspect of the work of IISU would be the linkage function between the various parties interested in the industrial development of the country.



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INTRODUCTION

The project reported here was set up after close consultation among the Government of the Yemen Arab Republic, the Resident Representative of the United Nations Development Programme (UNDP) and the Institutional Infrastructure Section of the United Nations Industrial Development Organization (UNIDO).

Objectives

As set out in the job description (dated 5 August 1975), the objectives of the project were the following:

To identify and survey the present and future requirements of Yemeni industry and industrial planners for information by making contact with the relevant Yemeni authorities, organizations and, above all, industries, to consider plans for growth in the industrial sector

To identify the presently available sources of information, both local and external, that supply data in such fields as technology, raw materials, markets, labour, industrial innovations, licensing and utilities

To survey the requirements for information of the industrial sector and industrial planners in the Yemen Arab Republic in co-operation with the relevant authorities at the Ministry of Economy and to define the priority areas of such information

To recommend the type of service to be established at the Ministry, its methodology, personnel needs and the fields of activity to which priority should be given on the basis of the above considerations and in close consultation with the project leader of the Industrial Promotion and Advisory Unit (IPAU) at the Ministry of Economy

To advise on the setting up and operating costs of the recommended information service, the type of equipment needed, the selection of staff and on-the-job training programmes

To prepare a draft project document based on the above recommendations, specifying the UNDP contribution and the counterpart contribution of the Yemen Arab Republic Government, in consultation with the Resident Representative, the IPAU project leader and the appropriate government authorities

Official arrangements

The mission of the expert was performed during one month, from 27 July to 26 August 1977, including travel time and briefing and debriefing at UNIDO headquarters. The remaining time (14 days) were spent primarily in Sana'a', with an additional round trip to Ta'izz and Al Hudaydah. The work performed fell into the following categories:

Reading of the background and statistical material (annex III)

Discussions with experts in relevant governmental bodies (annex II)

Visits to Yemeni industries (annex I)

FINDINGS

Principal socio-economic aspects of the Yemen Arab Republic in 1977

The population of the YAR is estimated to be 7,000,000, but this number includes the nearly 20% who work abroad. This group includes most of the able-bodied male workers. Of the remainder, 90% live in the rural areas and are engaged in agriculture, fisheries and other rural activities. The domestic industrial sector employs only about 25,000, a slightly greater number is engaged in wholesale and retail commerce, and the Government employs about 40,000.

In 1975, the foreign trade of the Yemen Arab Republic encompassed exports of the value of Yemen Rials (YRls) 60 million and imports of YRls 1,000 million. The deficit was covered by remittances sent to their families by the emigrated workers. The expenditures of the national Government exceeded its income; the deficit was made up by the Governments of Kuwait and Saudi Arabia. Practically all products of the industrialized countries are available in the principal cities of the Yemen Arab Republic. The rate of inflation varies, perhaps averaging 20%.

The Government is in a state of rapid transition, institutionalizing itself and drawing competent individuals into its network of public authorities and other bodies. A high proportion of the international development aid received has been - and continues to be - allocated to the development of basic infrastructure such as roads, ports, telecommunications, electrical power, water supply and housing.

The educational system has been assessed with regard to the future needs for trained manpower. This factor appears to be of critical importance for the long-term development of the country. This problem has many causes, among them the present high rate of emigration, the low level of literacy, the unpredictability of the role of women in the future socio-economic life of the Yemen Arab Republic, the present tendency of the educated to engage in wholesale merchandising and other trade, rather than in industrial activities, with a consequent preference for formal academic education rather than practical training in the industrial, commercial or administrative branches. These factors combine to form an apparently intractable problem for the planners of education and training.

With the aid of expatriate experts, the Government is seeking a way to guide the Yemen Arab Republic into rapid, harmonious and expansive development. In this context, the co-ordinating body is the High Commission for Planning; the Central Planning Organization (CPO) acts as the secretariat of the Commission.

In 1975 the share of the industrial sector of the Yemeni gross national product (GNP) was approximately 6%. According to the report Industrial survey: 1976 (annex III), the two primary lines of priority as regards industrial development are, first, the agro-industries, including fisheries, which are to be developed to rationalize agricultural production, and second, increased emphasis on industries whose products can substitute for imports. A system for gathering and analysing statistical data is to be developed in stages.

The development plan envisaged in the Industrial survey: 1976 thus diverges into two different fields, the agricultural and the industrial, indicating the need for co-operation between the Ministry of Economy and other ministries. The agro-industries will probably require statistical data regarding agricultural products. Co-operation with the Ministry of Agriculture and its research and extension activities will therefore, in all probability, be necessary.

As noted, the levels of skill of the present industrial workforce are unsatisfactory; they must be raised to increase productivity and reduce maintenance costs. The planned development of several vocational and technical training schools is probably the most valuable step in this direction. It is likely that afternoon and evening training facilities will be required.

The task of investigating the mineral resources of the Yemen Arab Republic is of great importance in its industrial development. The Government has invited a team of specialists on natural resources from China and Romania to undertake this work, which had already begun in July 1977.

The industrial sector

Most of the industrial establishments in the Yemen Arab Republic are privately owned, either solely by Yemenites or with private international participation. The Government has full ownership of seven factories and partici-

pates in another. The composition of the industrial sector of the economy of the Yemen Arab Republic is presented in table 1. The annual production and the numbers of workers employed in the various industrial sectors are summarized in table 2.

Table 1. Composition of the industrial sector of the Yemen Arab Republic

Industrial branches	Number of workers		
	1 to 4	5 to 9	10 or more
Food	6 785	77	22
Textiles	2 561	33	7
Chemicals, printing, wood and paper	95	59	13
Building materials (non-metallic)	506	13	8
Metals	<u>1 120</u>	<u>29</u>	<u>9</u>
Total	11 067	211	59

Table 2. Annual production value (YRls 1,000) and number of workers employed in the various industrial branches of the Yemen Arab Republic

Industrial branches	Production value	Number of workers
Food	225 443	12 209
Textiles	82 664	6 070
Chemicals, printing, wood and paper	84 659	1 048
Building materials (non-metallic)	69 762	1 811
Metals	<u>96 597</u>	<u>2 818</u>
Total	559 125	23 956

Despite the present limitations and shortcomings of the industrial sector of the Yemen Arab Republic, the industrial investment climate of the country may be said to be attractive; law No. 18 of 1975 on "Promotion and organization of investment in the Yemen Arab Republic" is a supportive measure for investors.

Plants visited during the mission

Of the 14 plants visited (annex I), the Sana'a' textile factory, was a large-scale enterprise (1,200 workers); two were small (a pump factory and a furniture plant, each with 10 to 15 workers), and the rest were medium sized (50 to 150 workers). None of the "mini-sized" (5 to 9 workers) or "micro-sized" (1 to 4 workers) establishments were visited.

Information on all of the plants visited was available from one or more of the following types of sources: international consulting firms, European or North American experts or Yemeni staff with university and basic professional training in Europe or the United States of America. The sole exception was the pump factory, which required additional information for its foundry production line.

All of the firms visited noted as their three major problems:

An insufficient labour force

Inadequate skill level of the labour force available

The need for more adequate maintenance

In addition, several firms noted the need for better quality control and measures towards some level of standardization (specifications). Most establishments would welcome a quarterly news-letter with news from the different fields of industrial interest: raw materials, methods, processes, new equipment, end-products, markets, maintenance routines, managerial and accounting systems.

A fundamental reason for the present rather mild interest of the visited factories in an industrial information service and for the priority given to the skills of the workers is that much of the needed operative production intelligence is actually built into the modern equipment which is used by those factories. It is by upgrading the workers' skills and of the quality of maintenance that will permit rapid increases in productivity and profitability.

Governmental strategy for industrial development

In the summary portion of Industrial Survey: 1976 (annex III) the Ministry of Economy pointed out the basic methodology and strategy for assessing

future efforts towards industrial development, as follows:

To initiate a preliminary plan for industrial development, based on a set of selected projects

To investigate the links between these projects as regards the raw materials and components that they would require and their optimal location as regards electrical power, means of transportation, fuel and labour force

To perform pre-feasibility studies for all of the suggested projects to determine their requirements for investment and their production costs, including preliminary surveys of local and foreign markets to establish the optimal production capacity for each project

To publicize the projects in order to attract investment

To perform feasibility studies in close collaboration with investors, using international consulting firms and giving priority to the projects according to their overall targets of the general industrial, economic and social development of the Yemen Arab Republic.

Some other efforts envisaged in the summary report by the Ministry are:

To develop existing workshops, for example, by bringing in external experts to study the current situations and to make suggestions to resolve the problems

To train workers for improved maintenance work

To study product costs in detail

To study products and marketing strategies

To modernize industrial statistical surveying and to use its results to encourage the industrialists to carry on with the industrialization of the country

The detailed plans for the industrial development, sector by sector, had not been made available in English.

CPO has the overall co-ordinating role in national, all-sector development planning. (Its five-year plan was not available for study.) As responsibility is delegated, sector by sector, below the national supra-level plan, it is within the Ministry of Economy and its Industrial Department that a great proportion of the investigative and analytical work must be done. The Ministry of Economy would thus be the principal governmental body to make use of an Industrial Information Service Unit (IISU) in its day-to-day work.

Within the Ministry of Economy there already exist (and more are planned) other sections or units that have, or will have, day-to-day contact with the

industrial establishments of the Yemen Arab Republic. These bodies and IISU would, in several ways, benefit from close collaboration. Among these activities would be industrial registration, licensing, contracts and agreements, standardizations and specifications, productivity and training, statistics, and project planning and follow-up.

Most of the present study was made in close co-operation with the Ministry of Economy and Department of Industry staffs and with that of the UNDP office at Sana'a'. Some discussions were held with experts from other international and binational aid bodies, the results of which have been of great value as regards vocational and technical training programmes and facilities and the availability of library resources.

II. RECOMMENDATIONS

Long-term perspective

The Yemen Arab Republic has a definite need for an Industrial Information Service Unit (IISU). Over the long term it should be developed in three stages, each with a different kind of balance services to governmental bodies and to industry.

Phase A

This stage would cover the first three to five years, partly depending upon the rates of development within Government and industry. It should include establishing the IISU, the appointment of a person to be responsible for it; training this person in the Yemen Arab Republic and abroad; creating a modest-sized library; starting a quarterly news-letter, initiating contacts with governmental bodies and industry and various industry-oriented organizations and with training centres, starting of the active service, following up etc. A most important function during this phase will be the linkage between different interested persons and organizations.

Phase B

By this time, governmental administrative infrastructure will have been further developed. Governmental bodies have expanded and will require an increasing amount of services but will also have opened up their own communication and information gathering channels to a higher degree and have qualified staff able to do most of the information analysis. Industry will have begun to require more services often including information analysis. This second phase should be the period of expansion for IISU. It is important that it be kept informed by experts within the governmental bodies about developments within their areas of competence. It is also important that the visits to industries continue; most probably they would need to be expanded. Both the library and its staff would need to expand, especially by the inclusion of some qualified industrial engineers. This second phase may also last for three to five years.

Phase C

Most governmental bodies will have expanded and have so many qualified staff that they would be mostly self-sufficient as regards information

gathering and analysis. The role of the services provided by IISU will have become marginal. Within industry, branch organizations may have been established, chambers of commerce most probably will have been activated, an effective net of international communications and co-operation may have been established, some research facilities may also have been developed etc. Nevertheless, this is not a period of decline for IISU but one of orientation. It will still have to serve the governmental bodies to some extent and provide the bigger industries with a wide range of information, but those will not be the main tasks. IISU may now be the central body for the following functions:

Small and medium-sized industries would continue to need support to increase their productivity. Much travel will be required, and there will also be a need for staff able to give appropriate answers to those industries

There will still be a need to develop managerial, production planning, marketing techniques, product development and other skills throughout the industrial sector

IISU may also serve as the national focus for all non-classified scientific, technical and industrial information gathered through the expanded network of official representation of the Yemen Arab Republic, all over the world

IISU may also serve as the national centre for information and documentation activities within the Yemen Arab Republic, specializing in the natural sciences, engineering, technology and industrial operations, including industrial economy. This centre would co-operate closely with similar centres and computerized service nets all over the world and also with domestic research science and technology.

IISU might also have the responsibility for training the information and documentation staff members needed in various governmental bodies and in industry.

The various steps mentioned in this phase may be initiated at quite different times. The first ones may be started only 5 to 8 years after the start of phase A, the other only after 15, 20 or even 25 years.

Recommendations for the immediate future (Phase A)

The Government should establish a special Industrial Information Service Unit (IISU). It is further recommended that it be established within the Ministry of Economy. The exact administrative location within the Ministry cannot be defined, but should be determined from the actual organizational structure when IISU is to become operational and at which operational level it would be most appropriate.

It is further recommended that the Government, in co-operation with the relevant United Nations bodies, agree upon a project (scheduled briefly above as phase A and in detail below) in which all parties contract their respective parts, responsibilities, and funding aspects of the project, and that the Government in due time appoint a person to be responsible for the IISU.

IISU should begin its operational activities on a modest level, concentrating upon the following three principal functions.

Extension service. Visiting governmental bodies and industrial establishments all over the country, of all sizes and of all branches. Detailed analyses of all principal factors for each industry will provide a registry of the industries in the Yemen Arab Republic that will be of the greatest value for the future activities of IISU. Many questions can arise at any time. They should be answered through:

The question/answer service. Each inquiry must be answered either by giving the relevant information in such a form that it can be used by the inquirer or by answering that no information is available (directly or through co-operating channels/bodies). This requires a modest-sized library, good co-operating channels and sources and competence of the person responsible for IISU.

The News-letter (quarterly). This is a necessary means of keeping contact with the companies visited and with other relevant bodies. In addition to information about industrial in connection with the Government (including, for example agricultural production aspects, infrastructure development and training facilities) it will inform about raw materials, methods, processes, technologies, new equipment, end-products/markets etc.

This information will be gathered through contacts with experts within the Government and by following international technical and industrial periodicals and by material published by IISUs in other countries.

If a more ambitious programme for the IISU should be contemplated, either with regard to its scope (to include more functions) or to a more intensified and expanded operational activity, this would have to be studied in much greater detail than was possible during the short mission on which the present report is based.

The success of the plan will depend, primarily, on the person selected to be responsible for IISU. He must be carefully selected and properly trained. Indeed, his training programme may be considered as the beginning of the creation of the IISU. At present there is a serious shortage of qualified personnel in the Yemen Arab Republic, although this situation will probably be eased when the young Yemenites now studying abroad return home. It has been suggested that a person with the suitable qualifications will soon be available.

This person should have training in engineering or industrial operations, and possibly some knowledge of agriculture, teaching methodology or both. Alternatively, a person trained in industrial economics or management could be chosen but such a candidate would require much study of engineering and technology of a general nature. If possible, the candidate should have some years of experience in industrial work. A good knowledge of English is essential.

The programme for the training of the person selected, in the Yemen Arab Republic and abroad, should be as shown in annex IV. It should be noted, however, that this programme assumes that the needed government actions have already been taken. Time will be needed for the Government to reach a decision to establish the IISU, for discussions between the Government and the relevant United Nations bodies concerning the project, for the recruitment and appointment of the person to be responsible, for the engagement of United Nations experts for the various phases of the project, and for the arrangement of fellowships for study abroad.

Details of the recommended programme

Visits in the Yemen Arab Republic

The visits to industries and governmental bodies will give the appointed person a good overview of the future users of the service that he is to head.

This original survey tour should be supervised by a senior staff member within the Ministry of Economy. The nucleus of the future industrial register should be formed during this period.

Studies abroad

The studies abroad should have two objectives:

Making the appointed person well acquainted with the conditions within industry in other countries, including different sizes of factories and various branches

Making the appointed person well acquainted with the work of IISUs abroad, their methodology, their documentary and other resources, their equipment etc.

In addition, consideration should be given to the work performed by such IISUs for governmental bodies. The studies should be performed both in countries with market economies and in those with centrally directed economies, with possibilities for some travel in each kind of country. The following plan for the studies abroad is suggested:

The Industrial Development Centre for Arab States (IDCAS), Cairo - two weeks

Czechoslovakia and the German Democratic Republic - three weeks each (alternatives, Hungary and/or Romania)

Denmark, Netherlands and Sweden - three weeks each (alternatives the Federal Republic of Germany and/or United Kingdom)

Since the central IISUs in all of these countries are in close co-operation with UNIDO through the FID/II, a proper study programme for the trainee should be able to be arranged.

The United Nations experts

The United Nations experts will be needed to help the responsible person to start up the practical work of the IISU:

The Librarian to advise on:

The practical arrangement of documents and cataloguing and loan procedures

The acquisition of reference books

Subscriptions to newspapers and journals

Possible co-operation with other library units within and outside the Yemen Arab Republic, including the procurement of literature difficult to obtain

IISU expert to advise on the full spectrum of activities needed to make the IISU a competently acting body.

A two-month follow-up effort may be needed after the agency has been in operation for some time

The Publications Specialist to advise on:

Methods of collecting items of interest

Procedures for selecting the items most suitable for publication

Layout techniques

Language questions

Printing and photoreproduction methods

Document distribution methods

For all three of these experts knowledge of Arabic would be an asset. In the last case it would probably be a prerequisite.

It is not unlikely that the person selected to perform the IISU work will be transferred by the Government into another position. It would then be important to assign a new responsible person for the IISU in as smooth and well-planned a manner as possible. The new head of IISU would certainly require studies abroad.

Equipment and similar requirements

Most probably, IISU will need access to a reliable photocopying machine with a good throughput capacity. Easy access to a telephone (for mainly local Sana'a' calls) is essential.

For the Library, there will be needed some shelving, a card catalogue and a set of reference books, some of which would have to be renewed annually or biannually, plus subscriptions to some newspapers, journals and selected abstracting publications. The estimated costs of these requirements are presented in table 3.

Table 3. Estimated setting-up costs (\$US) of IISU

Items	Amounts
Equipment	500
Reference works	1 500
Subscriptions to journals (annual)	1 000
Travel costs (visits to industries)	1 500
Printing costs (Newsletter)	500
Salary (annual) of responsible person	8 000
Envisaged United Nations support:	
Fellowship for studies abroad	9 000
Services of experts (10 man/months)	<u>65 000</u>
Total	87 000

Annex I

ENTERPRISES VISITED

<u>Dates</u>	<u>Enterprises</u>	<u>Cities</u>
7 July	Yemen Textile and Weaving Corporation Hossain El-Bahlouly, General Manager Mohammed Satarib, Director, Foreign Relations Mohammed Ali Alarabi, Financial Director Abdel Kawi Al-Deliy, Technical Director	Sana'a'
6 July	The Yumman Corporation for Trade and Industry (manufacturer of pumps) Obad Ahmed Jumaan, Director	Sana'a'
7 July	Unsuccessful efforts to visit two factories that were temporarily closed	Sana'a'
12 July	Visits to producer of biscuits, confections, cardboard boxes, sponge plastic material, rigid and soft PVC Ahmed Hayal Saeed, General Manager Soft drinks factory Production Manager Aluminium factory General Manager	Ta'izz Ta'izz Ta'izz
14 July	Cigarette factory Ali Addullah Amr, Production Manager	Al Hudaydah
16 July	Plastic shoe factory Production inspector	Sana'a'
16 July	Al-Bahd Furniture Factory Abdalla Salem Al-Mehdar, General Manager	Sana'a'

Annex II

GOVERNMENTAL BODIES AND PERSONS VISITED

- 9 July Central Planning Organization
Saad Mahroos, Director Loans and Technical Assistance
Department
Khalid A. Wali, Chief, Education Section
- 9 July Ministry of Agriculture
N. Orabo, the World Bank team, Ministry of Agriculture
- 10 July Ministry of Education
T. Elias, Project Manager
George Hamoui, Education Project
Saleh Shihata, IDA Education Project
Saleh el Mohallawi, Educational School, Sana'a'
- 11 July Ministry of Economy
Mohammad Abdul Wahab Jobari, Minister of Economy
The Government counterpart
Ministry of Economy, Department of Industry
Abdel Karim Ahmed Saleem, Director of Industries[✓]

[✓] Since succeeded by Mohammad Wizar.

Annex III

BACKGROUND DOCUMENTATION

UNIDO Vienna

Briefing Office

Yemen Arab Republic Country Sheet: List of UNIDO projects in the Yemen Arab Republic. UNIDO publications on industrial development within developing countries.

Library Yemen Arab Republic country files

Mathews Derek H. Background paper for a country programme UNDP 1974.

Sana'a' Yemen Arab Republic

Ministry of Economy

Industrial survey: 1976 (Seven-volume report)

Paper presented by Hussain Hamdani, Planning officer of the Ministry of Economy, Department of Industry, at the International Training Course on Industrial Planning, West Berlin, 24 April - 20 May 1977

Law No. 18 of 1975. Promotion and Organization of Investment in the Yemen Arab Republic

UNDP Office

CPO Statistical Yearbook 1976

El Ahmin Muddakhir. Summary of the facilities and the resources of in-plant (industrial) training in the Arab region. A report prepared for UNIDO by Muddakhir Architects and Consulting Engineers, P.O. Box 1920, Khartoum, Sudan, January 1977

Nehrt, Lev C. Report of a mid-term review mission. IDCAS April 1975
(RMB/71/288)

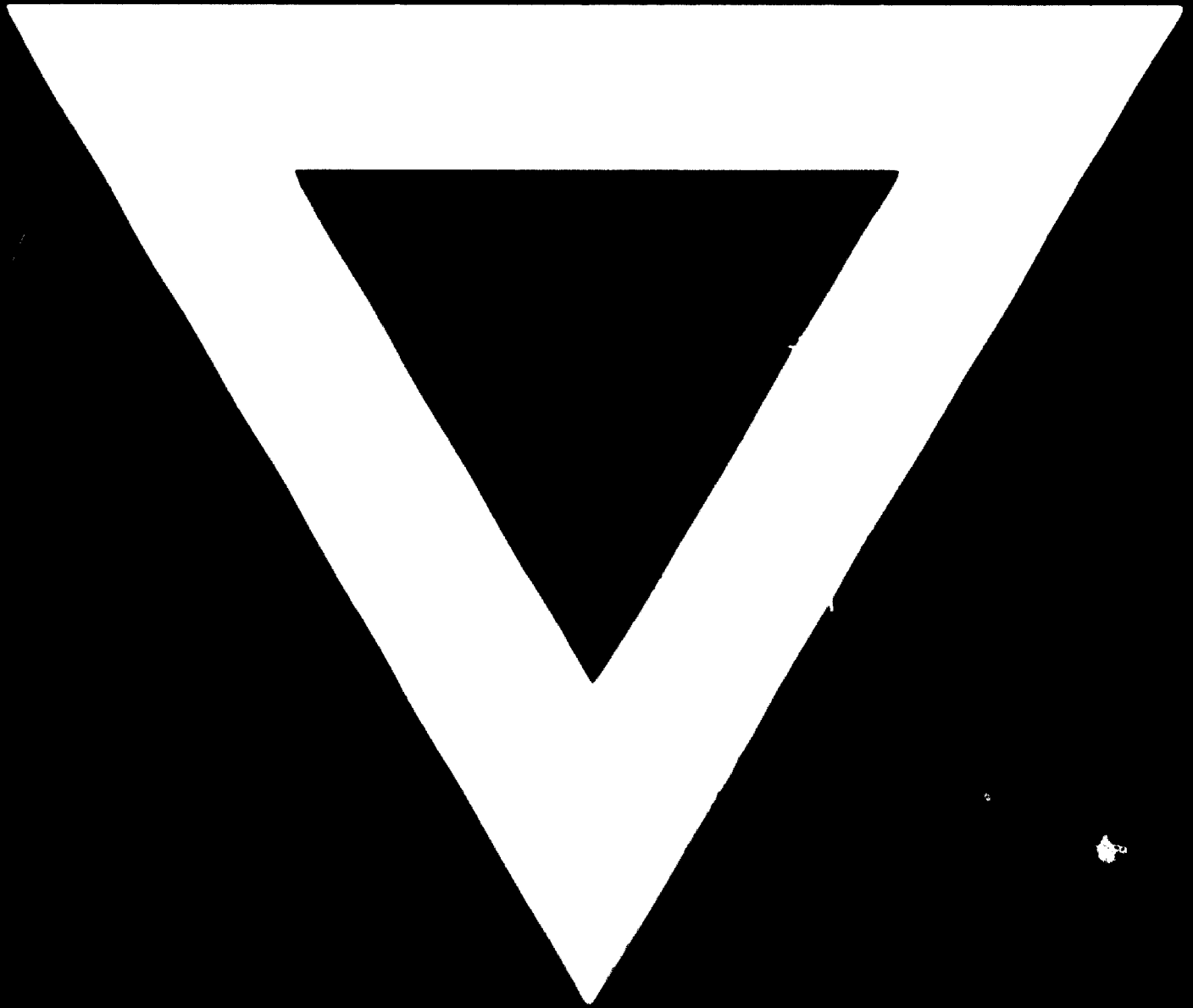
Sinclair, C.A. and Soohnat. Assessment of manpower development and policy and programme. Suggestions for the Yemen Arab Republic, January 1976
(ILO/UNDP)

Annex IV

CONTENT AND TIMING OF THE IISU PROJECT FOR THE YEMEN ARAB REPUBLIC

<u>Activities</u>	<u>Duration</u> (months)
<u>Yemani head of IISU</u>	
Visits within the country	3
Studies abroad (fellowship)	4
Active duty	43
<u>UN experts</u>	
Librarian	3
IISU expert	6 + 2
Publications specialist	2
<u>External contacts, domestic and international</u>	40

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