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ASSISTANCE TO THE GREATER COLOMBO ECONOMIC COMMISSION (GCEC)

PHASE III

DP/SRL/83/019

The Democratic Socialist Republic of Sri Lanka

Report of the evaluation mission*

Prepared in co-operation with the Government of the
Democratic Socialist Republic of Sri Lanka, the
United Nations Development Programme and the
United Nations Organization for Industrial Development

United Nations Industrial Development Organization
Vienna

* This document has not been edited.

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Explanatory notes

Currency Equivalents

(Annual Averages)

SRI LANKA RUPEES PER US\$. 1.00

1978	-	Rs. 15.61
1979	-	Rs. 15.57
1980	-	Rs. 16.53
1981	-	Rs. 19.25
1982	-	Rs. 20.81
1983	-	Rs. 23.53
1984	-	Rs. 25.44
1985	-	Rs. 27.16
1986	-	Rs. 28.02
1987	-	Rs. 29.44
1988	-	Rs. 31.70
On Jan. 19		
1989	-	Rs. 33.16

Principal Acronyms

B E P Z	-	Biyagama Export Processing Zone
E D B	-	Export Development Board
E P Z	-	Export Processing Zone
F I A C	-	Foreign Investment Advisory Committee
G C E C	-	Greater Colombo Economic Commission
I P S	-	UNIDO Investment Promotion Service
K E P Z	-	Katunayake Export Processing Zone
L B I	-	Louis Berger International Inc.,
P P E R	-	Project Performance and Evaluation Report
S I S	-	Special Industrial Services
T P R	-	Tri-Partite Review

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I. SUMMARY

1. Introduction

The Project DF/SRL/83/019 (Assistance to the Greater Colombo Economic Commission - Phase III) commenced its operations in August 1984 and is expected to be completed in November 1989. Nevertheless all major activities were already completed at the time of the Mission.

UNDP's first assistance to GCEC started in 1978 under SIS with the provision of consultancy services by Shannon Free Airport Development Company Ltd. Later on the project DF/SRL/78/012, Phase I started in June 1979 and lasted until April 1980. Phase II started in mid 1982 and terminated at the end of 1983. Phase III started in August 1984, as stated above.

UNDP contributions were \$.253,642 for Phase I and \$.39,972 for Phase II. Phase III was approved with a UNDP contribution of \$.332,000 and with the latest revision it amounts now to \$.531,411.

2. Objectives and Outputs

The objectives of Phase III can be summarised thus:

- * To strengthen the investment promotion unit of GCEC;
- * To improve the management capacity of GCEC;
- * To improve the recruitment service of enterprises.

The project foresaw three group of outputs which can be summarised as:

- * Strengthened management and administration;
- * Trained personnel through fellowships abroad and in-house on-the job training; and
- * Provision of computer hardware and software.

Almost all outputs have been by now produced.

3. Purpose of the Evaluation Mission

This mission was fielded at the request of GCEC and its mandate is to carry out an in-depth evaluation to determine whether:

- * the objectives of the project have been stated clearly and they are verifiable;
- * the project design is in consonance with the project objectives;
- * the project implementation has been efficient;
- * the assistance provided was timely; and
- * the assistance was effective and the results sustainable.

4. Findings

The findings of the mission, in brief, are as follows:

- * the project document was found, in general, well prepared with clear identification of objectives, outputs and activities;
- * the project was successfully implemented and it was, by and large, effective and created the expected impact;
- * almost all outputs have been produced ; and
- * the results are sustainable.

5. Recommendations

The mission recommends that:

- * the project should continue, though, certain modifications in the utilisation of the remnant funds are necessary;
- * no additional phase should be contemplated;
- * however, further technical assistance must not be ruled out. Infact, in specific areas, GCEC will need further assistance. This assistance should be considered when the policy stands of GCEC in implementing some of the recommendations made under Phase III becomes clear.

6. Conduct of the Mission

The mission was composed of:

Dr. Fuat M Andic. Team Leader, Consultant, Representative of UNDP
Mr O Gonzalez Hernandez. Chief, Evaluation Staff, Representative of UNIDO.

Each representative was briefed by the respective organization prior to the mission. Upon arrival to Colombo, the mission was briefed by the Deputy Resident Representative of the UNDP, the SIDFA and the Senior Adviser of the External Resources Division of the Ministry of Finance & Planning. Subsequently, the mission had the opportunity to meet all the assembled senior staff of GCEC, most of whom were also met separately in subsequent meetings. A new Director General had been appointed the same day of the mission's arrival to Colombo, with whom the mission met three times. The mission visited also some organizations whose work bear some similarity with GCEC's, such as EDB and FIAC. The mission met representatives of some of the factories established in the zones and also visited KEFZ.

Upon completion of the field work, the Resident Representative of UNDP called for a meeting which took place on 23rd January 1989 in the GCEC premises attended by the Director General and senior staff of GCEC, the Senior Adviser of the External Resources Division of the Ministry of Finance & Planning, the SIDFA and his JFO to whom the mission had the opportunity to present and discuss its finds and recommendations. It is the understanding of this mission that the report was well received by all parties. In particular, the Director General of the GCEC explicitly stated that he wished to follow the recommendations of the report.

Finally, the mission was de-briefed at UNIDO Headquarters on 27th January 1989.

The mission wishes to acknowledge hereby the helpful and excellent support, substantive and logistical, extended by the Director General of the GCEC and his staff, which enabled the Mission to complete its mandate successfully.

II. PROJECT CONCEPT AND DESIGN

Context of the Project

1. Historical Overview

Project DP/SRL/83/019 - Assistance to the Greater Colombo Economic Commission - Phase III, commenced its operations in August 1984 and its estimated completion date is November 1989. All major activities were completed by the end of 1988. The dates originally planned for starting and completion were respectively April 1984 and December 1985. The project's immediate objectives are the strengthening of the investment promotion activities of the GCEC, the design of management, information and administrative systems and the improvement of recruitment services for the enterprises in the Export Processing Zones (EPZs).

The context of the project may be best understood if the previous assistance were discussed here briefly. The Greater Colombo Economic Commission (GCEC) was established in early 1978 with the objective to facilitate and promote export oriented foreign investment, to create employment opportunities, to increase foreign exchange earnings and to facilitate transfer of technology. Two zones have been established, one for light industry at Katunayake (KEPZ) and the other one for heavy industry at Biyagama (BEPZ). For a variety of reasons, 21 bonded factories were established outside of these two zones.

UNDP's first assistance to GCEC started in 1978 under SIS and consisted in the provision of services of the Shannon Free Airport Development Company in drawing up a physical development plan for KEPZ and in advising GCEC on legislation, promotion and training. Later on, under DP/SRL/78/021-Phase I, a subcontractor, Louis Berger Int. Inc., provided intensive services to the GCEC in preparing of feasibility studies and plans as well as economic and industrial analyses. This Phase I lasted from June 1979 to April 1980. UNDP inputs amounted to US\$.253,642 and UNIDO was the executing agency.

The objectives of this project were stated as follows:

"The project is aimed at promoting planned industrial development in the Area of Authority of the Greater Colombo Economic Commission (GCEC), thereby providing employment opportunities in, and technology transfer to Sri Lanka, to promote foreign investment into Sri Lanka, foster economic development, diversify the sources of foreign exchange earnings and to increase export earnings.

To promote the establishment and further growth of the Investment Promotion (Free Trade) Zone adjacent to the Colombo Airport (Katunayake) and the setting up of light industries in this zone. To plan, promote and assist with industrial development in zones designated for heavy industries, one such zone being situated to the south of the Area of Authority of the GCEC, adjacent to the Kelani River in the region of Biyagama.

To assist the GCEC in preparing designs and specifications for the construction of all necessary infrastructure within the area of authority of the GCEC and to assist, as necessary, in evaluating all tender bids for the construction of the required infrastructure.

To prevent pollution and spoilage of the environment (eg., atmosphere, water, landscape, noise) and prevent health hazards within the area of authority of the GCEC, by advising on all aspects of environmental and effluent control and by designing the necessary preservation schemes and treatment plants.

To develop the staff capability of the Engineering Services Division of the GCEC".

A clearly drafted project document and a close cooperation between GCEC and the LBI team contributed to the successful completion of this phase of the project. Its objectives were met.

At the end of 1981 the GCEC was relatively well established; 42 factories were already in commercial production. Gross exports exceeded Rs.1,160 million during 1981 and about 20,000 Sri Lanks were employed in the zone. In order to avoid bottlenecks and to maintain the momentum gained, further assistance from UNDP/UNIDO was considered essential. This consideration gave rise to Phase II under project DP/SRL/81/003.

Development objective of the Phase II remained the same as Phase I, however immediate objectives as well as activities and outputs were different. Three major immediate objectives were foreseen;

a) to establish a system of development control for the entire area of the GCEC, formulate specific plans to promote industrial location, housing and other service amenities; b) to strengthen the investment promotion department of the GCEC and establish an industrial information system; c) to develop the skills of senior staff of GCEC.

The project foresaw to produce the following outputs :

- * A zoning plan and development control regulations for GCEC;
- * A set of policy guidelines for expansion of housing, services and infrastructural requirements;
- * Seven trained investment officers in investment appraisal and five overseas trained officials in investment promotion;
- * An adequately equipped auditorium in KEFZ; and
- * Trained senior GCEC staff in export processing, monitoring, legal counselling, project evaluation etc.,

The original project document signed mid 1982 budgeted UNDP inputs in the value of \$.208,000. However, it underwent a series of revisions, since the activities of the original project document did not reflect the most urgent needs of the GCEC, as perceived by its new Director General. Overseas training and promotional trips proved to be almost impossible to materialise due to difficulties in releasing staff. Because of such implementation problems, the Phase II was terminated at the end of 1983, after only \$.39,972 having been spent, mostly for study tours. A new phase, Phase III, under project DP/SRL/83/019 was prepared and approved in May 1984 with as UNDP contribution of \$.332,000. Operations commenced in August 1984 with a one month study tour related to the area of Industrial Relations. The most actual revision (N) signed on 30.11.88. states the UNDP contribution as \$.531,411. At the time of the in-depth evaluation, all activities with the exception of production of a video for training (sub-contract of \$.40,000) and the granting of a few individual fellowships and study tours (\$.19,832) had been completed.

The project's primary function is designated in the project document as Direct Support with Training being the secondary function. However, it aims clearly at upgrading skills of GCEC and therefore the project is really Institution Building with a strong component of Training.

2. GCEC in the Socio-Economic Context of SRI LANKA

Before we enter into the discussion of the project document, it is of some use to dwell briefly upon the functions of the GCEC and its place within the socio-economic set-up of Sri Lanka.

GCEC was established under the Law No. 4 of 31 January 1978. Its objectives are to foster economic development; to strengthen the economic base of the country; promote foreign investment; enhance foreign exchange earnings through exports; and create employment. It administers the industrial affairs of the Area of Authority designated as area of Greater Colombo (415 sq.km). GCEC operates two Export Processing Zones (EPZs); one at Katunayake (KEPZ) and the other at Biyagama (BEPZ). Their areas are 190 and 180 ha. respectively. (See Annex II) KEPZ is now almost fully occupied and BEPZ is about 35% occupied. GCEC has been in existence in about ten years and, as it will be explained in this report, it has had considerable success both in terms of attracting foreign investment, enhancing exports and generating employment.

Sri Lanka is a land of contrasts. It has a per capita income of US\$.360 (1986/87) which ranks it in the poorest one third of the world. Yet the country has achieved impressive levels in leading social indicators. The infant mortality is 7%, life expectancy is 70 years and the literacy rate is over 86%.

Two inter-related issues dominate the country's economic picture; the damages to its economic and social fabric over the recent years caused by ethnic violence and the worsening unemployment situation (about 18% in 1986/87), which in turn contributes to ethnic tensions.

Sri Lanka is an agricultural society with over 75% of its people living in rural areas. Tea, rubber and coconuts are the main cash crops. Not surprisingly, 27.7% of GNP is generated in the agricultural sector, 16.2% in manufacturing and 19.6% in trade. Its export structure also reflects the same structure. Up to 1985, more than half of its total exports was of agricultural origin. However, during the last three years or so, industrial exports expanded quite rapidly. While in 1987, industrial exports amounted to 48.6% of total exports, the share of agricultural exports declined to 42.2%. Within the industrial exports, textiles and garments occupy a predominant position (about 70% of total industrial exports). Notwithstanding the substantial increase in exports during the period of 1979-1987 at the average annual rate of 4.6%, the trade balance of Sri Lanka is still deficitary. The annual rate of growth of imports during the same period was 4.4%.

Historically, the growth in the industrial sector was rather slow, and in the past the sector has played a modest role in generating growth and employment. Import substitution policies and state enterprises characterise the general picture of industrial development until the late '70s. Private investors were rather cautious because of the lack of strong government commitment to the development of an independent private sector of industry. During the last decade or so, there has been genuine efforts to stimulate industrial activities and to encourage private sector industry and non-traditional exports. One such effort is exemplified in the creation of GCEC. As it will be shown in this report, the contribution of GCEC to export promotion and manufacturing activities is by no means negligible. Although internal strifes during the past 3 years or so were certainly not conducive to an accelerated expansion, now with the election of a new President, the apparent calmness in ethnic relations and the manifested posture of the President in favour of industrial development and export promotion, GCEC's activities are expected to be maintained.

The contribution of GCEC to export generation is worth noting. During 1987, gross export earnings of the enterprises which operate under the jurisdiction of GCEC amounted to over Rs.7m billion or 17% of the total gross export proceeds, textiles, apparel and leather products constituting the bulk of exports. Considering that in 1979, the share of the zone enterprises in the total exports was a mere 0.2%, one can appreciate the efforts made by the Commission to carry out its mandate.

Similar results also emerge if one looks at the foreign investment figures. while in 1979 total foreign investment amounted to Rs.33 million, in 1987 it exceeded Rs. 8 billion. This was of course, as a result of increasing number of enterprises locating their operations both at KEPZ and BEPZ as well as at outside of the zones. In 1979, total commercial operations amounted to 12 establishments. In 1987, 96 establishments and at the end of 1988, 101 establishments were in full operation and additional 32 were either in construction or in trial operation.

The same tendency is also observable with respect to employment figures. In 1979, total employment created in the enterprises under GCEC's jurisdiction stood at the level of 5,876. Preliminary figures for 1988 indicate that almost 55,000 workers are employed by the enterprises established in the two zones and outside of them. (For details see Annex V).

In short, GCEC has had considerable success in fulfilling its mandate. It helped to expand and modify the export structure of the country, attracted an ever increasing stream of enterprises, enhanced foreign exchange earnings and created employment opportunities where chronic unemployment has been the norm.

It is also worth noting that the overall expansion of industrial operations was made faster upto 1984. In 1985, some enterprises closed their operations due to the political unrest in the country and to uncertainties surrounding the business climate. Despite such conditions and despite the negative publicity in the foreign press in the subsequent years, GCEC has succeeded in attracting enterprises through perhaps the rate of increase in the number of enterprises as well as export have not as yet returned to the same rate of growth of the earlier years.

It is of course difficult to link UNDP/UNIDO assistance, in a quantitative manner, to the results described above. However, a certain measure of indirect quantification is possible. In what follows, the report expounds on the contribution that the project has made to the achievements of GCEC.

B. PROJECT DOCUMENT

1. The Problem and the Technical Approach-

Based on the type of assistance provided under the previous phases of the project, the UNDP/UNIDO and the Government of Sri Lanka came to the understanding that what was needed centered around strengthening the institutional set-up of GCEC. Such strengthening efforts should concentrate on the provision of upgrading GCEC's management information system; on increasing its administrative capacity; and on the development of a clear cut long term policy for GCEC.

To undertake such efforts, the project was built around a number of seemingly unrelated inputs, namely a one year investment promotion adviser, a series of short-term consultancy services, short duration fellowships and study tours totalling 15 m.m. and the provision of a computer Wang VS-65 with the necessary software. The management of the project did not require a CTA, but rather the Director of Investment Promotion assume this function. Given the relative strength of the recipient institution, the approach taken appears to be sound.

2. Objectives, Indicators and Major Assumptions -

The Development Objective of the project is to accelerate export oriented industrial development through foreign private investments, generating employment opportunities, foreign exchange earnings and technology transfer.

The immediate objectives are:

- I. To strengthen the foreign investment promotion unit.
- II. To improve GCEC's management and administrative capacity.
- III. To improve recruitment service for enterprises in the zones.

(twelve outputs were included in the project document, later on two being cancelled, while six were added.

The objectives and outputs were stated in the project document explicitly and with precision, with the exception of certain quantifications (number of manuals, a number of certain study tours), which were missing.

The activities listed were realistic except for a number of them (d,e and f, See document page 9) which refer to backstopping functions of the executing agency and cannot be considered as activities.

The inputs listed were realistic and commensurate with the activities to be developed and outputs to be achieved. Linkages between development objective/immediate objectives /outputs /activities/inputs were reasonable.

Major assumptions and clear success indicators in terms of achievement of outputs were implicit in the text of the project document, though not specifically mentioned.

3. Beneficiaries

As it can be discerned from the project document, the direct beneficiary of the project is the institution itself. More specifically the "foreign investment promotion unit" and the overall management (by computerising several activities related to management) are the beneficiaries. It should be stressed however, that the ultimate beneficiaries, the end users, will be the firms established in the zones which will benefit from an efficient zone management.

4. Work Plan-

This mission was unable to obtain a detailed work plan or a bar-chart. It appears that such a plan was never prepared and the national director of the project altered activities on a need basis. However, specific terms of references were prepared for each consultant's activities as it can be discerned from the reports prepared. e.g. final reports of Posts 11-01, 11-51 and 11-52 dated January 1987, June 1988 and August 1988 respectively. Furthermore, a framework for effective participation of national and international staff in the project, as foreseen in the project document, was not prepared.

III. PROJECT IMPLEMENTATION

A Activities

The document specifies ten distinct activities. These can be grouped in four areas:

1. Advise on foreign investment promotion. To appraise the promotional methods used by the GCEC and to advise on the implementation of an effective investment promotion strategy. In addition, on-the-job training to GCEC staff on investment promotion strategy and in developing contacts and negotiating with investors, would be provided. (See outputs 2 and 4 below).

2. Visit of one GCEC staff member to UNIDO/IPS in Japan, USA and Europe to establish direct contacts. (See output 5 below).
3. Training of senior and middle management in system analysis, review, approval and monitoring of enterprises and providing system analysis for the 'Job Bank'. This was to be undertaken by a sub-contract. (See outputs 6,8,9 and 12).
4. Provision of a computer hardware and software (related to the outputs 6,7,9 and 12).

B. Quality of Monitoring and Backstopping

For the monitoring activities this mission relies on two progress reports, one PPER and the reports of TRPs. The first progress report covers the period of January 1985 to June 1985 and the second July 1985 to September 1986. The PPER covers the period of October 1986 to March 1988. The first TPR was held on 26 September 1985 and the second on 4 November 1986. Both the progress reports and TPR reports appear to be quite detailed and candid with respect to project achievements and/or failures. Two major stumbling blocks seemed to have delayed the project. One was finding suitable candidates to fill the two short-term consultant posts and the other was the selection of staff to be trained. However, it appears that the project was rather well monitored, despite delays, which could not be avoided. UNIDO responded well to the changing circumstances in GCEC by frequently revising and rescheduling several activities and outputs, in order to ensure the successful implementation of project and satisfy the institution.

IV. PROJECT RESULTS

A. Outputs

The original project document foresaw twelve distinct outputs. Five of these outputs relate to immediate objective I, six to objective II and one to objective III. At a later stage (1987) and at the request of GCEC, three additional outputs were added to objective I and another three to objective II. Below, in tabular form, the outputs and their current status are listed.

Outputs

Status

Related to OBJECTIVE I. Investment Promotion

- | | |
|--|---|
| Output 1: An investment promotion strategy for the GCEC. | Completed. Further revision will be necessary in view of dynamic nature of the subject. |
| Output 2: Four staff members trained in methodology of investment promotion work, (local in-service training). | Completed successfully. Very useful to GCEC. |
| Output 3: Two staff members trained abroad in specific techniques of investment promotion. | Completed. Unfortunately, one left the organization. |
| Output 4: Promotion documents and manuals. | Completed satisfactorily. Newsletter and brochures have been prepared with the advise of the project. |
| Output 5: Direct contact established with UNIDO IFS Offices in USA, Japan and Europe. | Completed. Useful. Needs to be sustained. |
| Output 13: Study tours in Holland, UK, Belgium, Japan. | Completed. Result is satisfactory. |
| Output 14: A study to determine the advantages and supporting industries needed for industrialization ; active and immediate investment promotion. | Post II-52 contributed to the study jointly conducted with GCEC and National Development Banks and SRL Business Development Council. Results are satisfactory |
| Output 15: One staff trained in project preparation and appraisal. | Management of GCEC decided that this output is not required and therefore was taken out |

<u>O u t p u t s</u>	<u>S t a t u s</u>
Related to <u>OBJECTIVE II. Management & Administration</u>	
Output 6: Designed and installed computer based enterprise monitoring system.	Completed. Very useful.
Output 7: Installed computer hardware with capacity for expansion.	Completed. Very useful.
Output 8: Management information system identified for implementation during 1985-1990.	Completed.
Output 9: Trained staff in systems design, installation, maintenance and operation (local in-service training).	Completed. Very useful.
Output 10: Seven staff members trained abroad in specific areas of management and administration.	Completed satisfactorily.
Output 11: Project design for integrated area plan for Biyagama.	Output not required.
Output 16: Expansion of computer facilities to Biyagama.	Completed satisfactorily.
Output 17: Analysis and design of computer based system.	Completed satisfactorily.
Output 18: Training GCEC staff in water treatment technology.	Completed satisfactorily.
<u>OBJECTIVE III. Job Bank.</u>	
Output 12: Designed and installed computer	Completed satisfactorily.

Comments.

It may be concluded that with the exception of two outputs no longer required, all the others were produced satisfactorily with the assistance of the project.

B. Immediate Objectives

As it was explained in Section II, based on the experience of the previous phases of the project, DF/SRL/83/019 trimmed its objectives and concentrated its efforts on institution building. It is quite clear that the strengthening of GCEC was of immediate and primordial necessity. This was to be done by concentrating on strengthening the foreign investment promotion unit; by improving the management and the administrative capacity of the GCEC, particularly in terms of systems; and by improving the recruitment services for the enterprises in the zones through the Job Bank .

It appears that these objectives, which were in accordance with the immediate needs of the Commission, were met by the project.

C. Development Objective

The development objective of the project remained the same throughout the inception of the assistance. Both the previous phase emphasise that the development objective is to create employment opportunities, enhance foreign exchange earnings through export and provide technology transfer. The project has contributed to such goals as demonstrated by this evaluation. The only area where there was less results refers to technology transfer, since technology skills created outside the EPZs were relatively minor. However, EPZs are known not to be significant vehicles for technology transfer, so this cannot constitute a short coming of the project.

D. Unforeseen Effects

None could be ascertained by the mission.

E. Sustainability

As mentioned in this report, the project under review has, for all practical effects, completed its activities and all outputs have been produced. As a direct consequence of the project, a stronger and more capable institution has emerged which can better serve the interest of prospective and existing end-users. This could be attested by the continuous increase of industrial output of the zones and by the interviews conducted by the mission with selected industrialists established in the zones. (See Annex II).

The mission therefore concludes that the sustainability achieved by the project is highly satisfactory. However, due to the dynamic nature of foreign investment promotion, technical co-operation is required to complete and upgrade institutional know-how and data processing capabilities. This will be discussed in the following section.

V. FINDINGS

A. Related to the GCEC and its socio-economic environment

The mission found a well established institution with capable and motivated staff having good background and professional experience now enhanced by training. GCEC is an autonomous and relatively independent agency attached to the President's office but has to deal with and depends on the actions of a number of Ministries (eg., Textiles) where bureaucratic functions and delays may cause undue hardships to enterprises. A concerted effort from GCEC and related ministries would be needed in order to respond better and faster to the needs of the enterprises.

Despite the past social turmoil, the achievements of GCEC in terms of infrastructure, number of enterprises established, net foreign exchange savings and employment generation have been impressive. The Mission was particularly impressed with the high number of Sri Lankan entrepreneurs established in the zones.

In view of the dynamic nature of foreign investment promotion, GCEC is still weak with respect to having a vision for the future and therefore needs additional work in strategic planning, research and information.

The 'Job Bank' was established to assist enterprises in finding and selecting un- and semi skilled staff, but often seems to be a cause for delays and at times submit unsuitable candidates.

The mission hopes that the recent change in the top management of GCEC will enhance further internal relations in the Commission, the process of decision making and the relations with enterprises.

Certain infrastructure problems in the zones seem to persist, namely in telecommunications. GCEC should be instrumental in solving such problems. More on this is included in the report of post 11-52.

Working conditions, fringe benefits and amenities seem to be considerably better in the plants inside the zone than elsewhere. As far as social conditions are concerned, they may need certain upgradings but action by the GCEC in this area seems to be taking place (sports facilities) or are in the planning (hostels). We found that GCEC keeps vigilance of fringe benefits and amenities provided by the enterprises.

As far as environmental effects are concerned, the mission could ascertain that the GCEC is paying an increasing attention to this problem.

Some duplication seems to occur in investment promotion activities undertaken by GCEC and FIAC, which could be avoided by better co-operation between the two Commissions. The Mission could not ascertain the same duplication between EDB and GCEC, since their audiences and activities are different.

Based on casual observations of the mission in Colombo, in one of the zones and in several parts of the country, it seems that the social turmoil which prevailed in the country until the Presidential elections has considerably abated. This, in turn, should enhance the impact of GCEC in attracting foreign investment.

B. Related to Project

It is evident to this mission that all three phases of the Project have been satisfactory both in terms of its activities and outputs. Although at first glance the inputs may appear to be somewhat unrelated in their totality, all Phases achieved what it was aimed for and now they constitute an integrated package of technical assistance. It is especially worth noting that the output of the Phase I (report prepared by Luis Berger International Inc., August 1980) has been extremely useful in the macro planning of the zones.

Since Phase III weighs heavily within the overall project period, this report dwells upon it with some details. As it can be discerned from the previous pages, this Phase provided three groups of inputs. One group of inputs consisted of two experts, mainly in the area of promotion. Their reports were well accepted by GCEC and used by the counterparts in their daily conduct of business. One of the experts however had certain difficulties in day to day communications with the staff of GCEC and his adjustments to the conditions prevailing in Sri Lanka impaired his effectiveness. The expectations from his input therefore fell somewhat short, but certainly his overall contribution to the project, in the opinion of this mission, does not warrant the negative assessment made in the FPER.

The second expert produced two reports (11-51 and 11-52) both of which are of high quality. In addition, his day to day interaction with GCEC staff was very good; his suggestions were well taken and his training efforts were appreciated. In fact, the expert's suggestions, particularly the one dealing with the creation of the strategic planning unit are presently considered very favourably by the management for implementation.

The second component of Phase III was the provision of training, fellowships and study tours. The consensus within GCEC is that both training efforts (in-house and abroad) were quite successful and useful. It is the understanding of this mission that the staff who participated in training and study tours have been able to enrich their knowledge and experience and therefore the activities specifically geared to training has assisted them in the discharge of their duties. Two exceptions must, however, be noted. Training provided for the computer staff abroad appears to be good but not quite sufficient and at the required level in hardware use. The contacts and training provided by IPS appear to have been sporadic and somewhat short in duration and hence not fully beneficial. Such contacts are of better use if they are maintained on a more constant basis.

The third component, the provision of computer hardware and software, has also been completed successfully. The equipment was purchased locally and a local company provided the software and now it maintains the equipment. The equipment will eventually need upgrading through additional capacity and terminals. However, the choice of equipment was made with that eventuality in mind and it is conducive to upgrading. The mission ascertained that this equipment is now fully integrated in the management system of the GCEC and it is one of the key elements of the improved management.

Summing up, Phase III, in the opinion of the mission, was a key ingredient in the consolidation and upgrading process of GCEC and deserves some credit for the achievements of the Commission.

VI. RECOMMENDATIONS

A. Addressed to the G C E C

The mission recommends that GCEC continues its existing functions under the same tutelage (ie., in the President's Office) and should maintain its degree of autonomy.

A strategic planning unit, following the guidelines indicated in the report of Post 11-52, should be established. This unit should report directly to the Director General of the GCEC to assist him in promoting and marketing the GCEC more efficiently and effectively, within a new post-quota context and to maximize the economic impact of the EPZs in the country.

The Research & Documentation Unit should be strengthened with a view to promptly obtaining and processing accurate and update data on target countries and companies as required by the staff of the GCEC, more particularly by the proposed strategic planning unit.

An internal assessment should be carried by a Committee composed of GCEC and Zone Enterprises on the Job Bank to determine its effectiveness vis-a-vis the enterprises, with the aim of revising the policies and procedures of the Bank in accordance with the actual needs of the end users - the enterprises.

The mission recommends that co-operation with FIAC on promotion actions abroad be increased. In particular, it is recommended that GCEC should be a co-sponsor of the forthcoming Investment Forum which is planned to take place in Colombo in November 1989 with UNIDO's assistance.

8. Addressed to UNDP/UNIDO-

For the Phase III, this mission recommends that the remaining amount in the budget be disbursed, with some variations.

The budget allocated for producing a video for training at this point of time does not appear to be a priority. Instead, the amount should be allocated to expand computer services to the zones for acquiring two terminals to be placed in the management of the zones and to be linked to the main frame existing at headquarters. At the same time, "trade directories" of the target countries should be purchased immediately for the Research & Documentation Unit.

The amount allocated for training should be disbursed by providing study tours for the managers of the Zones to Shannon Free Airport Development Company.

It is advisable that the necessary modification of the project document be done as soon as possible, so that funds can be disbursed promptly and the project is brought to its end.

The mission does not recommend an extension of the present project or a new phase.

However, it is worth mentioning that in the near future, GCEC would need specific assistance in some well defined areas. These are:

- * Technical assistance of a short term duration to assist in setting up the "strategic planning unit", provided that GCEC agrees with the recommendations put forward in the report of post 11-52.
- * Short-term advisory services would be needed in the area of industrial safety. The consultant should develop guidelines, manuals etc., for monitoring industrial safety in the enterprises and provide on-the-job training for the officials of GCEC in charge of industrial safety.

In the area of equipment, funds would be needed for procuring :

- * additional equipment for upgrading computer hardware; and
- * environmental control and testing equipment.

Finally, it is of importance for GCEC to maintain contact on a much longer term with the IPS in the targetted countries. Fellowships for such a purpose, of a longer duration than upto now, would be valuable for GCEC to carry out its mandate.

VII. LESSONS LEARNED

EPZ's under the appropriate economic environment, play an important role in employment generation, particularly at low levels of skill, in generation of foreign exchange but less so in technology transfer.

Institution Building projects which have a series of inter-related but rather independent (un-coordinated) set of inputs, may achieve substantial impact provided the recipient institution is strong and cohesive and exercises a clear mandate.

Linkages between technical co-operation projects dealing with industrial investment promotion and the operations of the different IPS have a multiplying effect in the project's impact and therefore should be encouraged.

ANNEX I

UNITED NATIONS DEVELOPMENT PROGRAMME

Joint Evaluation Mission of the Government of
Sri Lanka/UNDP/UNIDO/ on DP/SRL/83/019 - Assistance to the
Greater Colombo Economic Commission (GCEC), Phase III

TERMS OF REFERENCE

1.0 Background

The Greater Colombo Economic Commission (GCEC) was established in 1978 with the objective to facilitate and promote export oriented foreign investment, to create employment opportunities and to increase export earnings. Within this authority two Export Processing Zones (EPZs) have been established at Katunayake (near the airport) for light industry and at Biyagama for heavy industry.

UNDP's first assistance to the GCEC (DP/SRL/78/021) from June 1979 to April 1980, provided intensive services to the GCEC in preparation of feasibility studies and plans as well as economic and industrial analyses. The second phase commenced in August 1982 (DP/SRL/81/003) with emphasis on investment promotion missions to the major industrial countries.

Following discussions between GCEC and UNDP/UNIDO in late 1983, the project entered a third phase which commenced in July 1984 (DP/SRL/83/019). It was aimed at developing an investment promotion strategy for the GCEC, designing information and administration systems and improving recruitment services for enterprises in the EPZs.

In June and July 1986 a UNIDO project formulation mission reviewed the implementation status as well as future development needs of foreign investment promotion under the GCEC. The ongoing project was extended and amended to further improve GCEC's computer operations, including the Garment Quota System, the Job Bank and the Enterprise Monitoring System. Specifically the hardware configuration was to be developed in connection with future expansion and staff trained in systems design.

In August 1988 the GCEC suggested to carry out a joint in-depth evaluation.

2.0 Purpose

The primary purpose of the evaluation is to make an assessment of the effectiveness, impact and relevance of the entire UNDP/UNIDO assistance given the GCEC.

As part of the above task, the mission will specifically review if the approach of the project has led to optimum results, and will assess the efficiency and effectiveness in achieving its goals.

The mission should feel free to review all steps in the formulation and implementation of the project (and make recommendations as to its future).

3.0 Issues to be covered

3.1 Are the project objectives, both long term and immediate, clearly stated and are they verifiable?

3.2 Is project design in consonance with project objectives?

The evaluation mission is to consider whether:

- a. the problem the project is supposed to solve is clear and the approach to be used is sound;
- b. the beneficiaries and the users of the project results are identified;
- c. the objectives are achievable and whether the relationship between the objectives, the outputs, the activities and the inputs, is clear, logical and commensurate given the time and resources available;
- d. a workplan is included in the project document and whether it has been followed.

3.3 Assessment of efficiency of project implementation

The evaluation mission has to examine the quality and timeliness of the inputs and activities as well as the quality and timeliness of the responsibilities of project management to changes in the environment of the project and the monitoring and backstopping by all parties to the project.

3.4 To assess the effectiveness of the assistance provided to the GCEC.

3.5 To ascertain the impact this assistance has had or is expected to have on the working of the GCEC as well as the significance of the results for Sri Lanka.

4.0 Lessons learned

The mission should record any significant lessons that can be drawn from the experience of the project and its results, in particular anything that worked well and that can be applied to other projects and anything that should be avoided in the future.

5.0 Composition of the mission

The mission will be composed of the following:

Dr. F.M. Andic	Consultant, representing UNDP
Mr. O. Gonzalez-Hernandez	Chief, Evaluation Staff, representing UNIDO

6.0 Timetable and itinerary of the evaluation

The mission members will receive briefings at UNDP and UNIDO headquarters. Upon arrival in Colombo, the mission will be briefed by the UNDP Resident Representative and the UNIDO SIDFA, who will also provide the necessary substantive and administrative support. The mission will attempt to complete its field work in Colombo within ten working days starting on 10 January 1989.

Debriefings will be arranged for the team leader at UNIDO headquarters in Vienna and UNDP headquarters in New York.

The mission will prepare its report in the form as indicated in the attached outline. The report should be completed as far as possible in the field to facilitate additional consultations as may be necessary. In any case at the end of the field work the mission will present its initial findings, conclusions and recommendations, and will discuss them with Government and UN officials.

The team leader is responsible for the preparation and distribution of the final evaluation report in accordance with UNDP regulations.

7.0 Desk Survey

The evaluation mission shall familiarise itself with the following documents with respect to the project before travelling to Sri Lanka:

- Project documents for phases I - III, (DP/SRL/78/021, DP/SRL/81/003, DP/SRL/83/019).
- Latest major project revision, (DP/SRL/83/019/M).
- Project Progress Evaluation Report (PPER), (November 1986 - April 1988).
- Progress Reports, 1/85 to 6/85; 7/85 to 9/86 and 26.4.88.
- Tripartite Review Reports, 26.09.85 and 04.10.86.
- Technical reports prepared by experts and consultants (Mr. J Gorie's report dated January 1987; Mr. I McElveen's reports dated June and August 1988).

8.0 Consultations in the field

The mission will maintain close liaison with the UNDP Resident Representative and the SIDFA in Sri Lanka, the concerned agencies of the Government, any members of the international team of experts, the counterpart staff assigned to the project, as well as UNIDO's field staff in the country.

Although the mission should feel free to discuss with the authorities concerned anything relevant to its assignment, it is not authorised to make any commitments on behalf of UNDP or UNIDO.

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A N N E X II

LIST OF PERSONS INTERVIEWED

GREATER COLOMBO ECONOMIC COMMISSION :

Mr Nissanka Wijewardena	Director General
Mr F R S Heeraratne	Deputy Director General
Mr A de Vass Gunawardena	Director-Investments
Mr G L Perera	Director-Technical Services
Mr H C Peiris	Director-Finance & Administration
Mr S P Wijenayake	Senior Manager-Administration
Mr G K Amaratunge	Senior Manager-Area Administration
Mr L Wijetunge	Senior Manager-Industrial Relations
Mr M P T Cooray	Senior Manager-Appraisal
Dr S P Anarakone	Senior Manager-Environment
Mr Ajit Ekanayake	Senior Manager-Information Systems
Mrs Thulika Wijeratne	Manager-Promotion
Mrs. I. Pestonjee	Asst Manager-Research & Documentation

MINISTRY OF FINANCE & PLANNING :

Mrs. V. de Silva	Advisor-External Resources Dept.
Dr. Kumar Fernando	Actg. Director-Foreign Investment Advisory Committee.

MINISTRY OF TRADE & SHIPPING :

Mr. Camillus Fernando	Director General, Export Development Board
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ENTERPRISES :

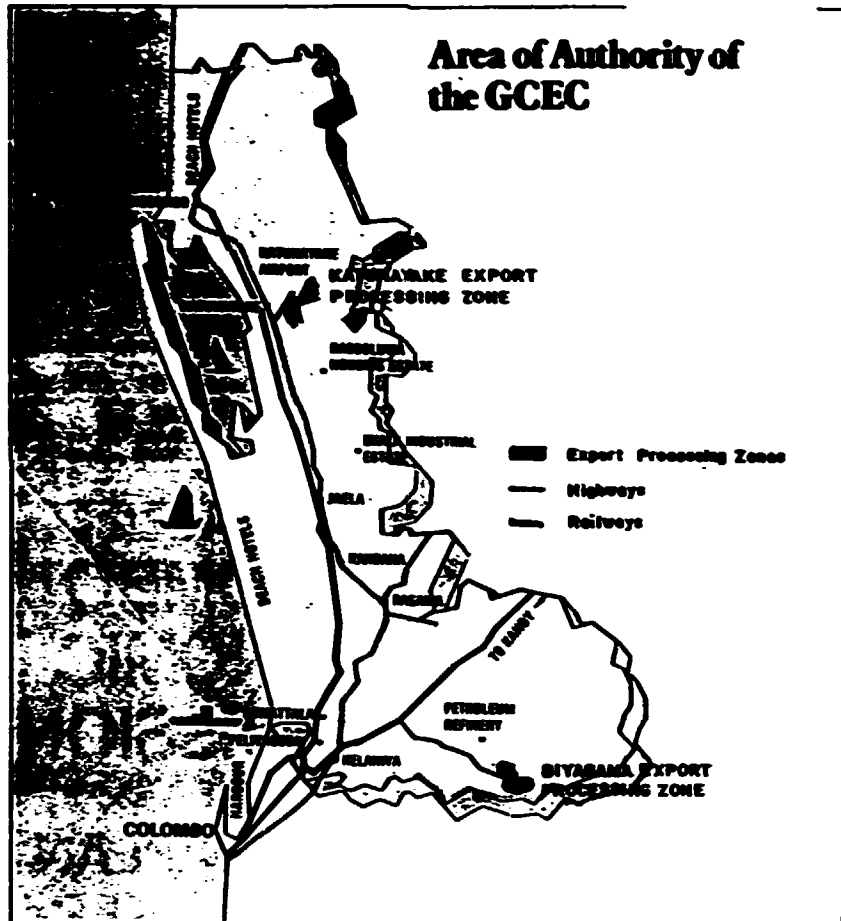
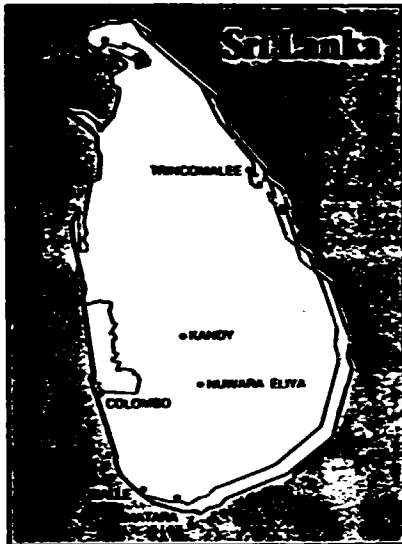
Mr Ajit Dias	President of Free Trade Zone Manufacturers Association and Managing Director, Jewelknit Ltd.
Mr R.C. Gray	Manager, Katunayake Garments Ltd
Mr A. Perera	General Manager, Elsteel Ltd.

U S A I D :

Mr Talbot Penner	Officer, Private Sector Development
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UNDP / UNIDO :

Mr B.B. Thapa	Resident Representative
Mr K. Kahane	Deputy Resident Representative
Mr. J. Gorsky	SI DFA / UNIDO
Ms Carin Andersson	JPO / UNIDO.



THE EXPORT PROCESSING ZONES

The Greater Colombo Economic Commission's (G.C.E.C.) Area of Authority is 415 sq. km. in extent and is located in the densely populated Western Province where more than a quarter of Sri Lanka's population of 15 million work and live. Sri Lanka's two Export Processing Zones are located within the Area of Authority, at Katunayake and Biyagama. Both zones are close to Colombo, Sri Lanka's commercial capital and principal Port and are set in landscaped surroundings, a few minutes drive from residential, educational and recreational facilities.

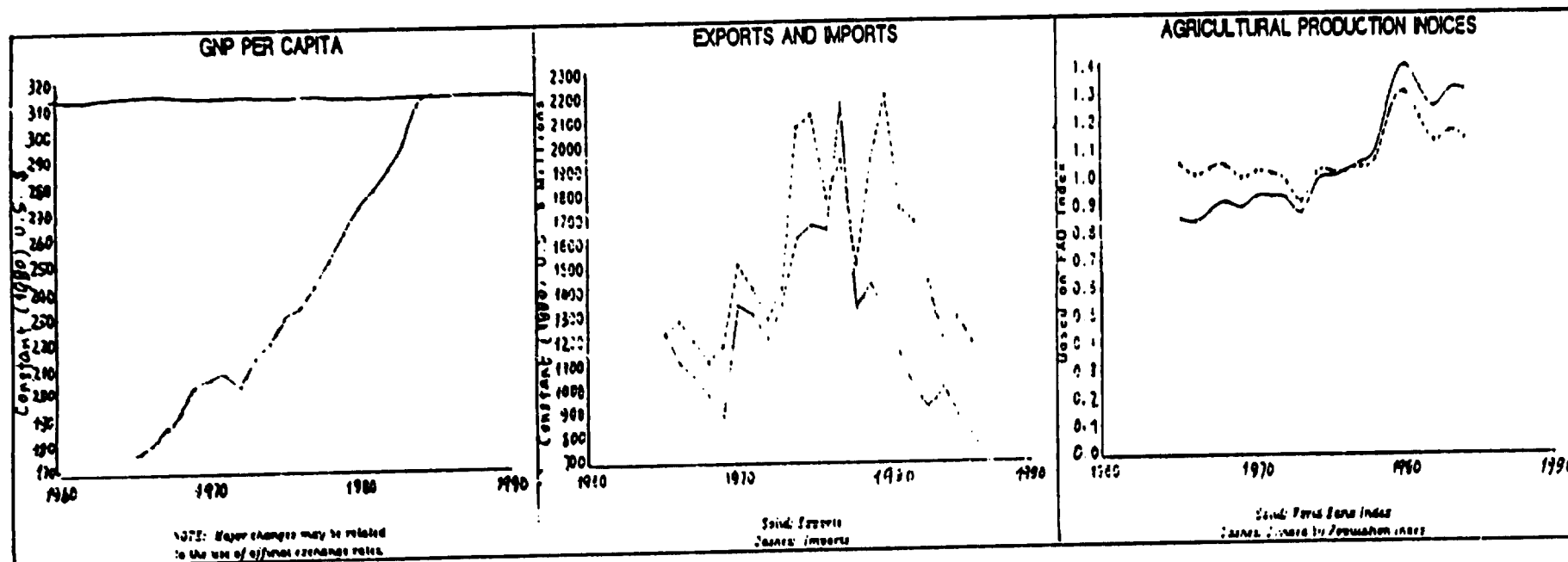
Established in 1978, the EPZ at Katunayake is presently in its third phase of expansion. Located within easy reach of the zone

are the Colombo International Airport at Katunayake, the Island's largest housing complex at Raddoluwa, the Ekala Industrial estate and several beach resorts.

The Biyagama EPZ is located by major river and is closer to the Port of Colombo. Power generating stations and the Island's largest Petroleum Refinery are in close proximity to the Zone.

Efficient and centralised services provided at the Zone, together with the availability of a low cost easily trainable workforce are features which have proved an irresistible lure to investors from all over the world. The G.C.E.C. invites you to take a closer look at the EPZs.....

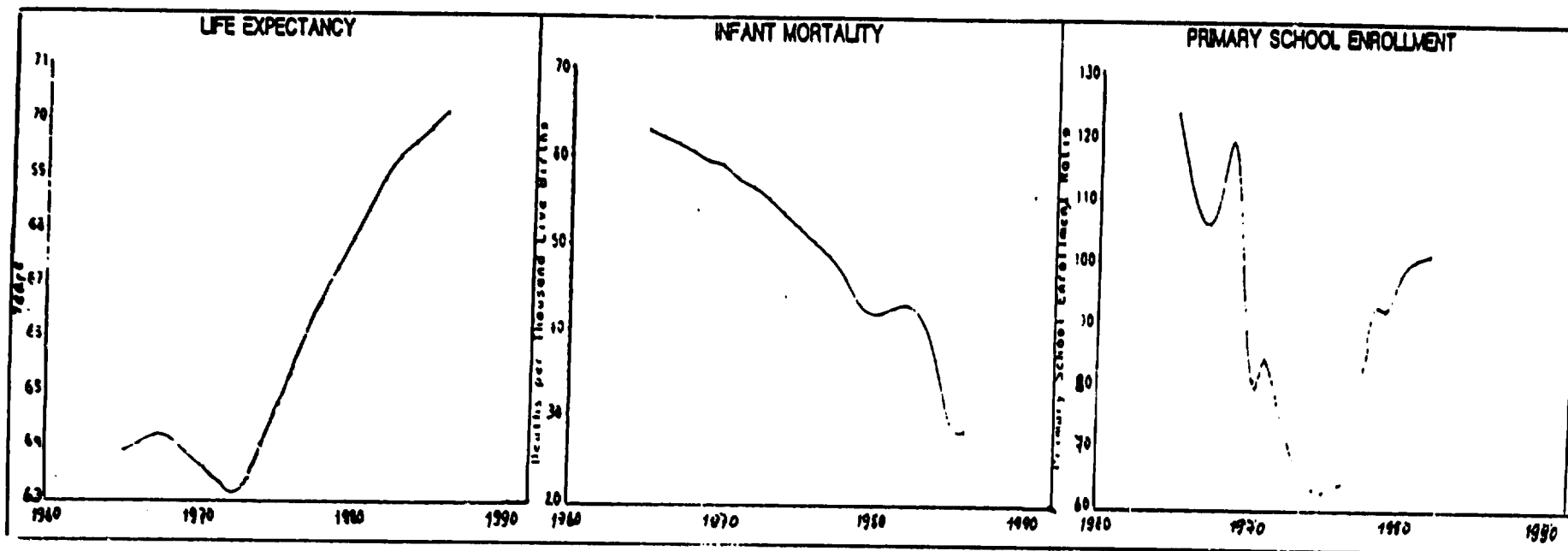
The boundaries shown on this map do not imply official endorsement or acceptance by the United Nations Industrial Development Organization.



NATIONAL INCOME AND EXPENDITURES			
Per Capita GNP.....(1985)			380
Average Annual Real Per Capita GNP Growth Rate.....(1965-85)			2.9%
Government Budgetary Expenditures as a % of GNP.....(1985)			35.7%
Total Expenditures and Net Lending (\$ Millions, US):			
(1982)	1,650	(1983)	1,726 (1984) 1,938
Budgetary Deficit or Surplus (\$ Millions, US):			
(1982)	-678	(1983)	-557 (1984) -403
INTERNATIONAL RESERVES AND EXTERNAL DEBT			
Official International Reserves Equivalent to 2.0 Months of Imports (1985)			
External Public Debt as % of GNP....(1985)			48.7%
Service Payments on External Public Debt (\$ Millions, US).....(1985)			226
As % of Total Export Earnings...(1985)			14.5%

EXTERNAL TRADE (IN 1980 CONSTANT \$US)			
Trade Balance (\$ Millions, US) (1984)	-207(85)	-405(85)	-391
Total Imports (\$ Millions, US) (1984)	1,209(85)	1,27(86)	1,189
Major Imports (1986) TEXTILES;PETROLEUM;MACHINERY			
Total Exports (\$ Millions, US) (1984)	1,002(85)	882(86)	798
			22%
Major Exports (1986) TEXTILES;TEA;RUBBER			
Trading Partners: JAPAN;UNITED STATES;GERMANY(FEDER)			

AGRICULTURE			
Agricultural Production as % of GDP.....	(1985)		26%
Major Crop(s)		As % of Arable Land	
Subsistence: RICE;CASSAVA;CORN.....		55%	(1986)
Cash: TEA;RUBBER;COCONUTS.....		35%	(1986)
Ag. Exports: (1986) TEA;RUBBER;COCONUTS			
Ag. Imports: (1986) WHEAT;RAW SUGAR;RICE			



POPULATION

Total population... (Thousands, Mid-1987) 16.407
 Population Growth Rate... (1970) 1.9% (1978) 1.8% (1987) 1.4%
 Population (1987) By Age Group:
 (0-14 yrs) 33.5% (15-64 yrs) 61.7% (65+ yrs) 4.8%
 Married Women Aged 15-49 yrs. Using Contraception... (1987) 62.0%
 Total Fertility Rate... (1970) 4.3 (1987) 2.6

HOUSEHOLD INCOME AND EMPLOYMENT

National Income Received by Low 20% of Population.. (1982) 3.7%
 % of Population Living Below Absolute Poverty Level
 () Total () Urban () Rural ()
 Labor Force Participation as % of Working Age Population
 () %
 Proportion of Labor Force in Agriculture... (1981) 45%

NUTRITION AND HEALTH

Per Capital Calorie Supply as a % of Requirements (1983) 106%
 Life Expectancy at Birth, in years
 (1986) Total 70.1 Male 68.2 Female 72.2
 (1970) Total 63.6 Male 62.5 Female 64.8
 Infant Deaths in First Yr of Life per 1000 Live Births
 (1987) 29
 % of Children 12-23 Months Old Fully Immunized Against
 Tuberculosis (BCG3) 67% (1984) Measles 24% (1984)
 Diphtheria (DPT) 67% (1984) Polio (3) 65% (1984)
 Population with Reasonable Access to Safe Water
 Supply (1981) 70%

EDUCATION AND LITERACY

Total School Enrollment as Ratio of Population in Age
 Primary (1982) Total 101.3 Male 103.4 Female 99.1
 Secondary (1981) Total Male Female 63.6
 Post Secondary (1980) Total 2.3 Male 2.5 Female 2.0
 Adult Literacy Rate (1981) Total 86% Male 91% Female 81%

SOURCE: USAID Country Programme for Sri Lanka, 1988

ANNEX V

G.C.E.C. ACTIVITIES + ENTERPRISE PERFORMANCE (1978-1988 -31st DECEMBER)

	1978:	1979:	1980:	1981:	1982:	1983:	1984:	1985:	1986:	1987:	1988:	TOTAL:
I. NUMBER OF PROJECTS												
APPROVALS - ANNUAL	53:	40:	44:	18:	16:	13:	15:	13:	10:	31:	31:	284:
KEPZ	52:	32:	28:	11:	11:	10:	5:	2:	4:	11:	6:	172:
BEPZ	:	:	:	:	:	:	6:	7:	4:	13:	12:	42:
OUTSIDE ZONES	1:	8:	16:	7:	5:	3:	4:	4:	2:	7:	13:	70:
LOCAL INVESTMENT (Rs.M)												
LOCAL INVESTMENT	413:	257:	566:	682:	429:	94:	242:	104:	50:	220:	607:	3664:
KEPZ	376:	177:	271:	245:	84:	80:	68:	38:	40:	75:	95:	1549:
BEPZ	:	:	:	:	:	:	98:	55:	7:	89:	417:	666:
OUTSIDE ZONES	37:	80:	295:	437:	345:	14:	76:	11:	3:	56:	95:	1449:
FOREIGN INVESTMENT (Rs.M)												
FOREIGN INVESTMENT	938:	813:	2698:	981:	1171:	190:	436:	186:	138:	592:	1106:	9245:
KEPZ	551:	440:	727:	489:	265:	171:	132:	72:	102:	188:	216:	3353:
BEPZ	:	:	:	:	:	:	126:	87:	25:	242:	778:	1258:
OUTSIDE ZONES	387:	373:	1971:	492:	906:	19:	178:	23:	11:	162:	112:	4634:
TOTAL INVESTMENT (Rs.M)												
TOTAL INVESTMENT	1351:	1070:	3264:	1663:	1600:	284:	678:	286:	188:	812:	1713:	12909:
KEPZ	927:	617:	998:	734:	349:	251:	200:	110:	142:	263:	311:	4902:
BEPZ	:	:	:	:	:	:	224:	142:	32:	331:	1195:	1924:
OUTSIDE ZONES	424:	453:	2266:	929:	1251:	33:	254:	34:	14:	218:	207:	6083:
2. NUMBER OF PROJECTS												
CONTRACTED - ANNUAL:	30:	13:	25:	9:	12:	10:	13:	7:	7:	12:	26:	164:
KEPZ	30:	10:	20:	6:	7:	6:	8:	0:	4:	6:	6:	103:
BEPZ	:	:	:	:	:	:	1:	5:	2:	5:	13:	26:
OUTSIDE ZONES	:	3:	5:	3:	5:	4:	4:	2:	1:	1:	7:	35:
LOCAL INVESTMENT (Rs.M)												
LOCAL INVESTMENT	169:	101:	323:	181:	320:	364:	218:	65:	52:	108:	504:	2405:
KEPZ	169:	40:	223:	68:	192:	66:	92:	18:	40:	47:	61:	1016:
BEPZ	:	:	:	:	:	:	64:	42:	10:	32:	415:	563:
OUTSIDE ZONES	:	61:	100:	113:	128:	298:	62:	5:	2:	29:	28:	826:
FOREIGN INVESTMENT (Rs.M)												
FOREIGN INVESTMENT	208:	525:	943:	312:	1976:	948:	379:	135:	91:	359:	911:	6787:
KEPZ	208:	37:	685:	164:	362:	162:	153:	47:	68:	116:	98:	2100:
BEPZ	:	:	:	:	:	:	50:	81:	18:	109:	744:	1042:
OUTSIDE ZONES	:	488:	258:	148:	1614:	786:	176:	7:	5:	134:	29:	3645:
TOTAL INVESTMENT (Rs.M)												
TOTAL INVESTMENT	377:	626:	1266:	493:	2296:	1312:	597:	200:	143:	467:	1415:	9192:
KEPZ	377:	77:	908:	232:	554:	228:	245:	65:	108:	163:	159:	3116:
BEPZ	0:	0:	0:	0:	0:	0:	114:	123:	28:	141:	1199:	1605:
OUTSIDE ZONES	0:	549:	358:	261:	1742:	1084:	238:	12:	7:	163:	57:	4471:

	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	TOTAL
3. PROJECTS IN OPERATION (CUMULATIVE)												
1) COMMERCIAL OPERATION	13	25	42	52	67	81	77	91	96	101		101
KEPZ	12	22	37	46	57	67	62	68	70	69		69
BEPZ	0	0	0	0	0	0	0	4	5	11		11
OUTSIDE ZONES	1	3	5	6	10	14	15	19	21	21		21
ii) TRIAL OPERATION										2		2
KEPZ										0		0
BEPZ										1		1
OUTSIDE ZONES										1		1
iii) UNDER CONSTRUCTION										12		12
KEPZ										5		5
BEPZ										7		7
OUTSIDE ZONES										0		0
iv) AWAITING CONSTRUCTION										18		18
KEPZ										3		3
BEPZ										7		7
OUTSIDE ZONES										8		8
TOTAL NO. OF PROJECTS WHERE AGREEMENTS ARE IN FORCE (i+ii+iii+iv)											133	133
4. ACTUAL EMPLOYMENT	5876	10581	19727	24926	28705	32725	35786	45047	50744	54626		54626
KEPZ	5876	10291	19078	21500	24093	26291	28646	35243	39738	41042		41042
BEPZ							40	1349	2448	4686		4686
OUTSIDE ZONES		290	649	3426	4612	6434	7100	8455	8558	8898		8898
5. ANNUAL EXPORT EARNINGS (Rs.M)	152	529	1163	1655	2419	3553	3802	5396	7534	9546	**	35749
KEPZ	152	510	1036	1439	2110	3096	3280	4436	6083	7616		29758
BEPZ								69	297	533		899
OUTSIDE ZONES		19	127	216	309	457	522	891	1154	1397		5092
6. ACTUAL INVESTMENT (Rs.M)	37	47	421	1675	2504	6273	8329	10796	13261	15965		15965
Foreign	28	32.7	121.5	1269	2050	5132	6098	7298	8577	8450		8450
Local	9	9.8	299.5	406	454	1142	2231	3498	4684	7515		7515
7. ANNUAL NET FOREIGN EXCHANGE EARNINGS (Rs.M)	30	120	291	437	771	1072	1213	1447	2346			7727
8. IMPORTS (Rs.M)	28	253	516	1319	1297	2017	2826	2851	4066	5661	4902	25736
Raw Materials	7	183	396	843	1009	1649	2331	2326	3678	5229	(SeP)	17651
Capital Goods	21	70	120	476	288	368	495	525	388	432		3183
9. LOCAL PURCHASES (Rs.M)				75	108	140	235	160	195			913
Raw Materials				75	108	140	235	160	195			913
Capital Goods					31	39	42	41	32			185

PROVISIONAL

ORGANISATION STRUCTURE - G C E C

