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Technical Papers written by a Senior Advisor/Project Manager
of the United Nations (1969-1994)

Vol. II. Trade Promotion at National and Regional Levels



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Today we publish, in two volumes, a collection of technical papers written by Victor Segesvary on subjects related to his work as Director of various development programs of the United Nations and Chief Technical Advisor to governments in Asia and Africa. These papers, which were not published to date, concern mainly macroeconomic problems, the promotion of trade and some specific sectors, such as groundwater use and irrigation

The texts included in these volumes are in English and French -- languages in which the author worked on those continents -- but those parts of the book which concern all collected writings, such as the table of contents, the author's introduction as well as the notice about him, are reproduced only in English.

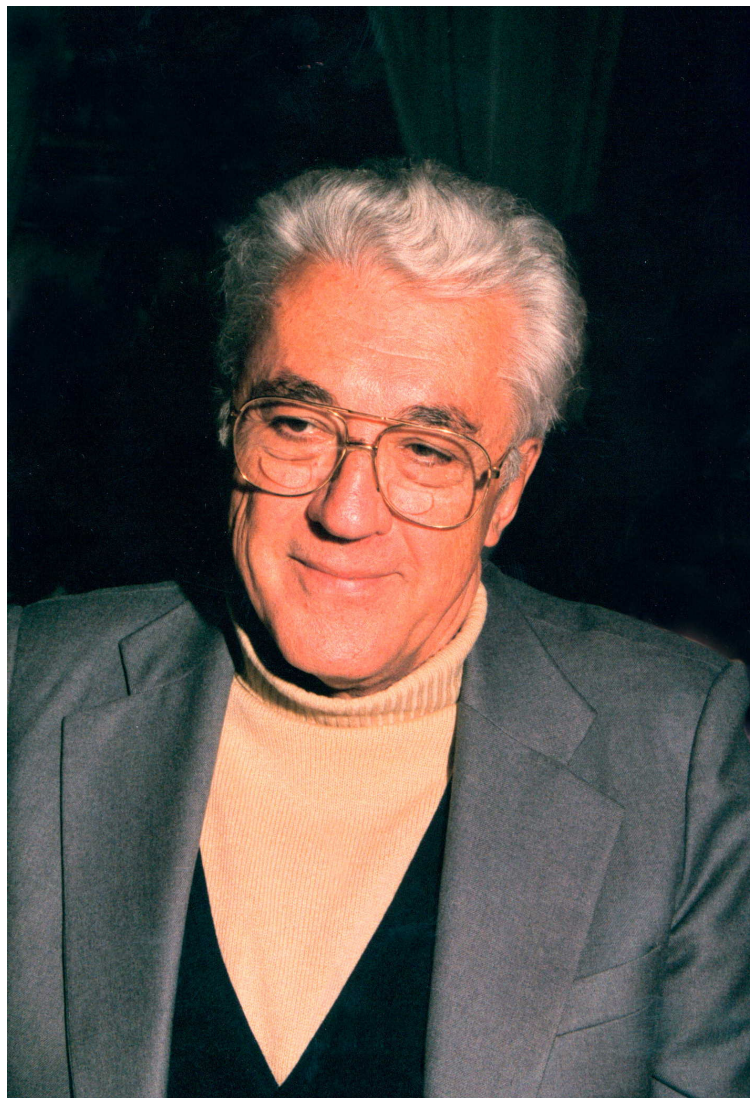
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The Hague (Holland), 25 March 2006

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*In REMEMBRANCE OF THE COUNTRIES
WHERE I LIVED AND WORKED*



Victor Segesvary

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TRADE PROMOTION AT NATIONAL LEVEL

Trade Promotion

Its Concept and Related Activities

by

Victor Segesvary, PhD., D.D.

ITC Project Manager

July 1975

A. THE CONCEPT

Export promotion at the macroeconomic level, i.e., at national and regional levels, means the undertaking the necessary studies and actions in order to develop a country's or region's exports. In the case of a region, export promotion applies as well to exports going to other countries of the region as to those directed to outside markets.

Export promotion also exists, of course, at the microeconomic level, i.e., individual enterprises, export marketing joint ventures or sectoral professional association – which are normally very active in this field –through their own marketing departments or through the engagement, for definite purposes, of specialized marketing agencies (market research, publicity, etc.)

Export promotion in fact is part of a larger concept, that of *trade promotion*. Trade promotion includes, from the macroeconomic point of view, the import side of a country's or a region's overall trade as well as the export side as well as in addition to the promotion of sales of one's own product, but also the study and examination of other sources of supply, Government buying practices on the target markets (the procurement market) and all other aspects of trade relevant to one's own sales efforts.

Truly stated, there is no export promotion, but only trade promotion. It is even more so when the trade or export promotion efforts intend to foster intra-regional trade, and through this the area's economic integration; in this case, it is not enough to study export possibilities of the countries which are located in the region, but it is also imperative to analyze their import structure in order to identify the opportunities where regional exports can be substituted to imports originating from outside the region.

Trade or export promotion is a phenomenon which reflects the revolutionary changes brought about by the marketing era. *Marketing* means, shortly stated, a market-oriented approach in economic activities versus a production-oriented approach which was unique and dominant before World War II (except in the United States where the marketing approach appeared between the two World Wars). The production-oriented approach meant that enterprises, public or private, and nations produced goods taking into account the natural resources they possessed and the human resources (skilled manpower, etc.) they disposed of, essentially in conformity with traditional ways of production and traditional concepts as far as producer and consumer/user relationships were concerned. Efforts to sell or export did not take into consideration what domestic or foreign consumers/users wanted to buy, their needs, preferences and desires, – but all activities were concentrated on selling or exporting what was produced or what remained at the disposal of exporters once the domestic needs were satisfied.

The Copernican change introduced by the marketing approach consists in a 180° reversal of the hitherto dominant concepts: producers and exporters must search for what are the needs, preferences and desires of their customers and adapt their production according to the findings. Consequently, production is geared to the markets instead of looking for suitable markets in view of selling existing products. This approach called for a whole set of new, practical tools of marketing in order to establish the right relationship between producers and consumers/users of their products, tools which constitute the essentials of trade/export promotion activities.

B. TRADE OR EXPORT PROMOTION ACTIVITIES

Trade or export promotion activities might be summarized under two great headings: studies and actions. The two are interdependent and overlapping in a certain sense, being elements of the same global approach.

1. STUDIES

Studies in the marketing field are always composed of two clearly separated phases: *desk research* and *field research*. Most of them necessitate the undertaking of both types of research, even if for some more emphasis is put on one or the other side.

The point of departure is always

(a) Study of the Export (or Sales) Potential

The objective of such a study is to show what can be exported (or sold), who exports what and where, – describing the specific product or product groups considered in detail; their production trend in the last years and their output in the future compared to the forecasts of domestic consumption, in order to establish the present and future export potential; the producing sector's characteristics and market conditions prevailing at the home market (prices, distribution channels, etc.); the country's or the enterprises' export performance in the past and their export marketing problems, reasons of their success or failures on foreign markets.

The criteria for the selection of products in view of export promotion activities, that is, which products are to be studied in the first place, are defined in a separate note figuring in this volume. However, it has to be realized that even if a study of export potential is done according to priorities established in conformity with the above-mentioned criteria, all exported or exportable products or product groups have to be dealt with at medium-term, should it be at the national or the regional level, in order to obtain a clear and overall picture of all export possibilities. In addition, all potential studies have to be updated regularly and as frequently as possible.

Export potential studies include always the two above-mentioned phases of work. They must be started with a desk research, – statistical analysis (production and export statistics, domestic consumption surveys if there are any, etc.), analysis of official documents (Plan, Governmental reports, documents issued by sectoral organizations, professional or exporters' associations, etc.), – but, afterwards, the data which were collected and analyzed in the course of the desk research have to be completed by a phase of field research. That means the interviewing of leaders of professional or exporters' organizations and of individual exporting enterprises, public or private, on their problems, their evaluation of export opportunities, past export performance of their products, etc., – i.e. through these interviews one obtains answers to specific points on which no written information can be found.

NOTE: These interviews as well as those referred to below in connection with market research studies are to be conducted on the basis of questionnaires prepared in advance and thoroughly discussed and tested with other members of the export promotion agency. However, these questionnaires should be considered as 'guidelines for discussion' with the interviewees because the open use of them in the course of the interviews may have a very bad psychological effect on the persons of whom sometimes one tries to get confidential or delicate information. Therefore, the questionnaires should be memorized and even if the interviewer does not follow exactly the order of questions established; the interviewer, having it in his memory, can always clarify some points later which were not dealt with in the course of the discussion.

Decision 1. After having accomplished several export potential studies, the analyst, with the other members of the export promotion agency, has to decide what to do next. In some cases, depending on the products considered and the findings included in the potential study, it will be evident that a market research study is to be carried out on some selected markets, but in other cases it might seem unnecessary to undertake such a long and costly enterprise and the decision will be taken to go immediately into action (see under section entitled: Actions).

(b) *Market Research Studies*

A market research study is, as opposed to general market surveys (see below), an analysis of some selected markets for specific products or product groups. It cannot be emphasized enough how important is the word specific a market research enterprise is only valid and useful, if it is carried out on specific markets for specific products (in the same country there is a specific market for toilet and cosmetic products, for domestic electric refrigerators, or fresh fruits and vegetables, and the market research is dealing with these specific markets).

In the preparation of a market research study there is, again, a first stage: desk research. The desk research work is composed of two separate phases:

(i) Desk Research

— *Selection of target markets among the most important world markets:* This selection is to be carried out on the basis of statistical analysis. For each market the imports of the product or group of products considered has to be analyzed (trend during the last five years, size and dynamism of imports; the principal exporting countries' share of the import market as well as the share of the products examined originating in the country for which the study is undertaken, if they are already present at the target markets; local production and consumption of the products, etc.) The statistical analysis has to be completed by the perusal of any written information available concerning qualitative data such as quality required, bilateral or multilateral trade agreements which might limit market opportunities, membership in regional trade arrangements (customs unions, common markets like the EEC, etc.) which also might influence the possibility of access to the markets under study, etc.

Once the target markets for the market research study are selected (not more than 4 or 5), a desk research has to be carried out concerning these markets:

— *Desk (or documentary) research concerning selected target markets:* In addition to the statistical data which were already analyzed in the course of the selection of target markets, all written information should be collected on those individual markets, including conditions of access (customs duties; other taxes; regulations applicable to the products considered like sanitary regulations; regulations concerning food products or chemicals, etc., distribution channels, prices, customers' preferences, advertising media, trade practices, means and forms of payment, delivery delays, etc.

Once the desk research report is ready, the second stage of the study, the field research, has to be prepared:

(ii) Field Research

— *Selection of the enterprises, officials, sectoral organizations and of any other persons to be interviewed* (eventually with the help of trade representatives posted in the countries to be visited);

— *Establishment of a time table of the field trip* and fixing in advance all the appointments with the organizations and persons selected for the interviews;

— *Elaboration of questionnaires according to the various categories of the interviewees;* for example, a separate questionnaire has to be prepared for the interviews with officials of the Government or of professional or exporters' associations, with executives of industrial enterprises or with importers, department stores' or central buying organizations' managers, etc. These questionnaires have to include all points which could not be clarified in the course of the desk research, or information obtained from documentary sources which, eventually, must to be checked. Consequently, they have to deal with subjects such as quality (variety, grading) and specifications of the products they import; their main sources of supply (competitors); prices, export and retail margins (importers, wholesalers, retailers); most suitable distribution channels; promotional efforts required (advertising, merchandising, participation at trade fairs), eventually in cooperation with the distributor; trade practices; transport and storage facilities; problems met by the interviewees in respect of other exporters, etc.

It is recommended that in the market research team which is sent to the target markets to make the interviews and collect as much material as possible in connection with the subject of its investigation (written documents like reports of professional or exporters* associations, company reports, packaging material used by department stores or by independent retailers, etc.), one or two representatives of the exporting enterprises should be included. This cooperation with officials of exporting enterprises has been very useful and successful in all developing countries not only because those business representatives contributed with their competence and thorough technical knowledge of the products concerned to the success of the field work, but also because the exporting sector felt bound to adhere to the market research report's conclusions and to benefit of it, instead of putting it aside in a drawer, because its own people were engaged in its elaboration.

After completion of the desk and field research, the market research team has to prepare the final report in a systematic and concise way, including in the annexes the list of the interviewees, the types of questionnaires used, etc., and to submit it officially to the exporting enterprises. It is also suggested

that a large-scale debate with the executives of those enterprises should be organized with the participation of all members of the team; this discussion will give the opportunity to the latter to answer specific questions of the exporters and clarify some points which might not seem clear to them.

Decision_2. Based on the results of the market research study, the export promotion agency has to decide, together with the executives of exporting enterprises and with those of the whole sector in question, what course of action has to be taken in the future. This follow-up of the market research study's conclusions might include some specific promotional actions in which the export promotion agency has to participate or play the role of a catalyst, whereas in some other marketing areas, – product adaptation according to the report's findings, lowering of production costs and export prices, improvement of packaging, etc., the necessary action has to be taken by the exporters themselves. The most the export promotion agency can offer is some specialized consultancy (eventually in the framework of international assistance) in view of the solution of those marketing problems.

(c) *Market Surveys*

Under the heading of studies, but apart of the above described normal procedure of market research activities, has to be mentioned the necessity to elaborate market surveys. A market survey, as opposed to a market research study, means the general description of a country's market, i.e. it is not prepared in order to promote exports of specific products or product groups to that market, and therefore it is not dealing with a specific market of the country (as indicated in the section concerning market research). Consequently, the elaboration of market surveys can be seen as a part of the trade information work of the export promotion agency which is, no doubt, very important because it allows would-be exporters to that market to get an overall look of its structure, conditions of access, past and future trends as well as to get a hint of some opportunities for their products.

(d) *Special Studies*

There might also be a need to prepare some special studies such as 'Packaging for exports of preserved vegetables and fruits' or 'Joint participation at trade fairs and exhibitions,' etc. These studies will either be elaborated by the export promotion agency or by consultants temporarily hired with a view to write a study on a specific subject.

2. ACTIONS

Actions are taken either on the completion of the export potential study of a given product or product group (Decision 1), or after having undertaken a market research study (Decision 2), – in both cases based on the findings and conclusions of those studies.

Among the actions which might be undertaken by the export promotion agency the most important are the following:

(a) *Market Development Projects*

Market development projects represent a logical extension of market research studies. That means that the team which was investigating in the field takes at once the necessary action where favorable sales opportunities were identified for the products or product groups studied. In this respect, the participation in the team of representatives of exporting enterprises is extremely valuable and it would be useful if one among them had some negotiating power in order to discuss with distributors at the respective markets. Summed up briefly, a market development project means that beyond the carrying out the market research study members of the investigating team try to establish the right contacts in view of selling their products whenever an opportunity arises.

(b) *Joint Marketing Ventures*

The export promotion agency can suggest to the Government and the interested parties, the creation of joint marketing ventures for products or product groups when their need and usefulness became evident. These joint marketing ventures would be organizations created to foster trade of specific products or product groups; they would take over all trade/export promotion activities in respect of the products concerned from the export promotion agency. The latter would however play a role of coordinator among the various joint marketing groups and would keep centralized all trade information, even concerning the products dealt with by the joint marketing organizations.

(c) *Trade Missions*

If in the course of various studies, especially the market research studies, market opportunities were identified or if this type of action appears to be suitable to promote the country's exports. the export promotion agency should organize trade missions composed of representatives of exporting enterprises and, eventually, of those of the whole producing sector to visit target markets, contact officials and would-be distributors (importers, chains, department stores, industries, etc.), initiate negotiations in view of future sales and invite businessmen to visit their country. Trade missions are generally considered among the best tools of trade/export promotion as they imply personal contacts, so important in establishing trade flows, and permit officials and business representatives to grasp directly the reality and visualize problems they might encounter in their export sales undertakings.

(d) *Joint Participation at Trade Fairs and Exhibitions*

Participation at trade fairs and exhibitions appears to be today the most suitable and less costly promotional action to foster developing countries' exports. The export promotion agency should initiate and co-ordinate joint participation of exporters of the same products or product groups; it should identify the most important specialized fairs and exhibitions in respect of the country's export products; establish a yearly calendar of the selected fairs and exhibitions on which joint participation is proposed; convince the exporters to get together to elaborate modalities of joint participation with the assistance, of course, of the agency's specialized personnel.

The assistance of the agency will be mainly to systematize the participation and give the necessary methodology: selection of products to be exposed; preparation of descriptive, technical cards concerning each product; preparation of sales promotion material (brochures, etc.); advice in the organization of a pavilion; preparation of questionnaires for professional visitors; organization of press conferences and writing up of press releases and, finally, follow-up action to the fair or exhibition.

(e) *Special Promotional Campaigns*

Two kinds of special promotional campaigns may be initiated and coordinated by the export promotion agency:

— Special exhibits for export products. A very useful tool of export promotion is the organization of special exhibits for selected products or group of products on target markets. For example, a fortnightly exhibition of woven textile products in a grand hotel of Abu Dhabi, open also to the public but with personal invitations to the professionals (importers, distributors, officials). Another example may be the setting up of a fortnightly exhibition of selected foodstuff, tinned vegetables and fruits and, whenever air transport arrangements can be made, even some fresh products, in Düsseldorf or Cologne in the Federal Republic of Germany, the largest consumer market in Europe. These special exhibits require the same systematic method in the preparation and organization as trade fairs and exhibitions. Therefore, the tasks the export promotion agency has to fulfill will be the same as enumerated under point (d).

— *Publicity campaigns*. Publicity campaigns may include advertising campaigns on target markets, using the mass media (press, radio and TV), and merchandising, i.e., publicity for consumer products in retail outlets which sell directly to the final consumer. However, attention has to be given to the fact that publicity is a very costly promotional tool and that there are very few export items of developing countries which really need such a promotional support (a typical consumer product which needs such a support would be, for example, toilet and cosmetic products).

As far as advertising is concerned, not only is it extremely costly, but also it is not easy to choose a reliable advertising agency and to control the results of the publicity campaigns. Therefore, exporters should be advised not to undertake such campaigns, especially as their products do not require such a promotional support. This problem is related to the exporters' brand policy as well; if they made an agreement, for example, with a large distributor, let's say a department store chain, and this distributor is selling their product under his own brand, he will undertake all the necessary advertising and other promotional actions in order to increase his sales without any financial contribution of the exporter. In case of merchandising, an overall agreement with such a distributor (especially if he has the exclusivity) will lead the latter to undertake all merchandising actions; he will only ask the exporter to furnish some promotional material and, eventually, to share the costs.

(f) *Export Incentives*

After having accomplished detailed and thorough potential studies in respect of the product or product groups considered, the export promotion agency, based on its findings and, eventually, on the

conclusions of a market research study which clarifies whether the country's products are competitive on the target markets, can propose to the Government some specific export incentives in order to foster foreign sales of those products. These incentives might be fiscal, financial, administrative or of any other type, with the exclusion of subventions.

Afghanistan

Criteria

for the Selection of Products in View of Export Promotion Activities

July 1975

Marketing has brought a revolutionary change in the commercial activities of enterprises, private or public, in the economic life of a country and in the trade among nations. It means, simply stated, that one does not sell and export what one produces, but one sells and exports what satisfies the needs of consumers and utilizers of a given product. One endeavors therefore to adapt production to the identified needs and preferences of the consumers and utilizers, i.e. after having undertaken market research studies, tests, trade/missions to the target markets and also having exposed the product at trade fairs and exhibitions where its various aspects (quality, price, etc.) may be compared by future consumers or utilizers with those of similar goods of competitors.

Nevertheless, the first important step is to identify the products which should be promoted. The definition of criteria for the selection of products in view of their inclusion in export promotion activities is presented here in the framework of this marketing concept.

FIRST STAGE: *Export Statistical Data*

1. Criterion: The size (volume and value) of yearly exports of the products considered;
2. Criterion: The dynamism or sluggishness of yearly exports of the products considered (evolution in% as compared to the preceding year;
3. Criterion: The part of each export item under consideration in total annual export earnings of the country (in percent).

SECOND STAGE: *Production/Consumption Data*

4. Criterion: The trend of production of each export item considered (evolution of production during the last five years in percent);
5. Criterion: Production: forecasts for at least five years, but – if possible – at a longer term for each product considered (targets of the Plan, investment targets of the Government and of the public and private sectors, – at least some reliable estimates, – concerning the output of the products examined);
6. Criterion: Domestic consumption forecasts for at least five years, but – if possible – at a longer term for each product considered (forecasts of the Plan and of the business community, public or private sector); forecasts even in the form of 'educated guesses' are very useful;
7. Criterion: Export potential, at medium and long-terms, for each product under consideration on the basis of production and domestic consumption forecasts (criteria 5 and 6).

THIRD STAGE: *Price Data*

8. Criterion: Whenever possible, comparison of production costs of all goods considered with similar costs in other producing countries, or with international production cost standards if they exist (see, for example, UNIDO).

9. Criterion: Comparison of export prices (FOB or GIF) of the products examined with export prices of other countries.

FOURTH STAGE: *Export Performance*

10. Criterion: Success of the products studied on export markets and reasons of this success:

- quality (grading, variety, etc.)
- competitive prices
- timing, e.g., out-of-season exports
- low transportation costs (for example, short distances to neighboring countries, good transport facilities, etc.)
- good sales promotion
- others.

11. Criterion: Failure of the products studied on export markets, and their reasons:

- quality (grading, variety, etc.)
- packaging
- non-competitive prices
- high transport costs
- lack of proper promotional support
- others.

12. Criterion: Success or failure of the products studied because of organizational and/or sectoral problems such as small scale industries, administrative procedures, restriction on imports of raw materials or semi-finished products entering in exported goods, etc.

For new products or products not yet exported, their selection should be done according to criteria 4 through 12, being understood in the case of criteria 10, 11 and 12 that an evaluation has to be made, on the basis of the details enumerated, of the probable success or failure they would have on import markets.

NOTES:

This check list of criteria has to be applied when selecting a product in view of export promotion activities is exhaustive. If one or the other of the criteria cannot be applied because of lack of information concerning certain products, the latter can still be included in export promotion studies and actions.

Exports made in the framework of bilateral trade agreements should not be taken into consideration when, evaluating export performance.

Afghanistan

Sector Statement – Foreign Trade and Export Promotion

I. GENERAL POLICIES

The Trade Development Program of the Republic of Afghanistan declares as a fundamental goal the raising of the living standard of the people through (i) an increase of the national product; (ii) the support of the producing strata of the population, and (iii) the protection of the consumers.

With a view to realize the above mentioned objectives in the field of foreign trade, the Trade Development Program suggests:

1. The collection of statistics and precise data about foreign trade;
2. A general investigation concerning Afghanistan's import and export problems in order to facilitate the execution of the Trade Development Program;
3. The rationalization of foreign trade activities through the promulgation of new regulations;
4. The conclusion of trade agreements with more countries of the world in order to find new markets;
5. The creation of a governmental trade enterprise which will do commerce in the public interest.

In addition, it was also foreseen to improve the country's transport system and transit facilities as well as the supervision of those through which transit goods destined to Afghanistan.

However, it is striking that the trade sector, and especially the foreign trade, were hardly mentioned in the present Plan, despite the ambitious Trade Development Program; it could have been, at least, expected that some quantified overall objectives would be fixed and some directives would be given.

A Seven-Year Plan will be prepared in the course of the present year and will be put into effect as of 1353 (1974/75). The Government decided now to include in it a large chapter on trade, foreign and domestic, and, especially, on the targets of Afghanistan's export drive.

II. ANALYSIS OF IMPORTS AND EXPORTS

Estimated total commercial imports (e.g., not taking into account commodity aid) amounted to US\$170.5 million for the year 1353 (1974/75), whereas estimated total exports to US\$211.5 million leaving a trade surplus of US\$41 million.

The preliminary forecast for the current year 1354 (1975/76), established at the end of April 1975, put total commercial imports at US\$220.7 million, total exports at US\$225 million, expecting thus a small surplus of the trade balance of US\$4.3 million.

The import/export analysis is based on figures which are found in the confidential report on the 1975 consultations of an IMF mission with the Government of the Republic of Afghanistan as data of the Central Statistics Department are currently under revision.

However, taking into account some other factors, a balance of payments deficit of US\$45 million was expected for the year 1354 (1975/76); recent official estimates reduced this to US\$9 million, due probably to lower domestic consumption of oil products, decreasing sugar prices and considerably increased national gas prices.

The estimated *import structure* for 1355 (1975/76) was the following: food and tobacco products 28.7% of the total, of which sugar represented 13.1%, tea 8.7%, vegetable oil and other food items 5.3%, and tobacco products 1.6%..

It was estimated that for the current year the part of the total of this group will slightly increase to 29.1%, with sugar jumping to about 16.9% of the total, whereas all the other items will loose in percentage points, thus tea by 8.1%, vegetable oil and other food items by 2.7%, and tobacco products by 1.4%.

As for the second group, chemical and petroleum products, their share of total commercial imports in the last year was 19.4%, with petroleum products standing for 6.9% of the total, chemical fertilizers for 5.1% and pharmaceuticals and other chemical products for 7.4%.

It is credible that the percentage change evaluation for the current year, in comparison to the preceding one, forecasted an increase of the part of this group of total commercial imports to 24.6%. This increase was due, according to the authors of the IMF report, to rising prices of oil products whose share was estimated to go up to 14.5% of the total and the rise of the share of pharmaceuticals and other chemical products by about 9%. The share of chemical fertilizers will shrink to 3.2%.

The largest part of total commercial imports, in the 1353 (1974/75) estimates as well as in the 1354 (1975/76) forecasts, were consumer and capital goods bought abroad, 51.9% and 46.3%, respectively. The decrease in the share of this group of total commercial imports was reflected by all the component items: clothing, textile fabrics and footwear, from 14.8% in 1353 (1974/75) to 13.6% in 1354 (1975/76); automobile and transport equipment from 11.3% to 9.5%; other manufactures and capital goods from 16.4% to 14.5%, and others, from 9.4% to 8.7%.

It is quite surprising to see that even for the group other manufactures and capital goods an almost 2 percentage points decrease was foreseen in a country aiming at a higher rate of industrialization. However, it appeared in the course of the current year that the share of pharmaceuticals and other chemical products would go up at least by 2%; the following section of this report may give the answer to this phenomenon.

The *export structure* as forecasted for 1353 (1974/75) was represented by the following products (in order of their share of total exports): raisins, 17.2% (the report remarks, however, that export values are believed to be overstated after 1352); cotton; 15%; fresh fruits, 14.6% (same remark as for the raising); natural gas, 12.5%; carpets and rugs, 9.5%; other dried fruits and nuts, 8.4% (same remark as for the raisins); Karakul furs, 12.2%; wool, 3.4%, and others, 13.6%.

Forecasts concerning the current year expected a general decrease in export earnings of all sectors, except for natural gas sales of which to the USSR will be considerably on the swing, the category of other exports and an almost negligible rise in exports of fresh fruits. It is foreseen, in consequence, that the order (percentage of total exports) of exported goods by Afghanistan will be the following during the present year: natural gas, 20%; fresh fruits, 15%, cotton, 12.8%; raisins, 11.2%; carpets and rugs, 9%; other dried fruits and nuts, 7.8%; Karakul furs, 5.8%; wool, 3.3%, and others, 15.1%.

It is to be added to this quantitative analysis of Afghan imports and exports that total figures are all given in current terms and not at constant prices. It seemed, therefore, preferable to give and compare percentages, and therefore also the expected decline in exports might be considered as very much preoccupying for the nation's authorities. The value increase can be accounted for by the general trend of price increase of primary products and inflation in consuming countries, but the real picture might only come out of an in-depth analysis, taking into account not only values but volumes. Another factor complicating the import/export analysis in Afghanistan is that customs statistics do not differentiate between commercial import and commodity aid, and in our view it would be totally wrong to compare export earnings with import values including commodity aid figures for which the country did not pay. The merit of the IMF report is to differentiate between commercial imports and totals including commodity aid and project aid.

III. EXPORT PROMOTION VERSUS IMPORT SUBSTITUTION

Every developing country is faced with the dilemma to choose between two methods to escape balance of payments difficulties and to finance its industrialization program: to improve marketing abroad of its exportable goods and to increase the number of export items, or to put all emphasis on import substitution. The International Trade Centre UNCTAD/GATT is an advocate since long time of the first method as it considers it being a positive approach, whereas import substitution policies appear as negative and not at all resolving the balance of payments problems when the countries need a growing volume of capital goods for their industrialization. If ITC/UNCTAD/GATT lately preferred the term of trade promotion and not export promotion, it was in order to include in this positive approach the import side as well, e.g., not import substitution, but rationalization of imports, the search for better and more favorable sources of supply abroad.

It is a remarkable fact that the Government of the Republic of Afghanistan did not follow the majority of developing countries who decided in favor of import substitution policies as against more efficient marketing abroad of the country's exportable products, but resolutely decided to promote Afghan exports first and finance the industrialization of the country out of increased export earnings. The creation of an Export Promotion Presidency in the Ministry of Commerce evidenced this attitude in a spectacular way.

It is just normal that as a corollary to this policy, and parallel the slow growth of domestic industrial production, import substitution takes place in certain sectors, but even in this respect the feedback effect of the export drive, for example, the unavoidable adaptation of the quality of exported

products to the foreign market's requirements and through this the improvement of the quality of products destined to the home market cannot be underestimated.

IV. EXPORT PROMOTION PROPER

The Trade Development Program of the Afghan Government determined four actions through which the promotion of the country's exports may be attained:

- (a) A serious effort of marketing abroad;
- (b) Improvement of the quality of exportable goods;
- (c) Rationalization of the activities of different exporting institutions and closer contacts with those enterprises which produce exportable items in order to assist them in their marketing difficulties;
- (d) Establishment of an Export Promotion Bank

In accordance with what the Trade Development Program of the Government spelled out, the main difficulties of promoting Afghan exports on world markets are:

- (i) The quality of the products exported or exportable;
- (ii) The enormous difficulties of transport to other than neighboring countries, including high freight rates which make Afghan export products non-competitive on most of the markets;
- (iii) The complete lack of market intelligence as far as quality requirements, packaging requirements, prices, access to the various markets or trade practices, are concerned.

In order to resolve these problems, the Minister of Commerce and the Export Promotion Presidency propose the following actions:

1. To undertake a complete photography of the actual and potential Afghan exports in form of export potential studies, according to the norms introduced by ITG/UNCTAD/GATT and applied in many developing countries of the world;
2. To establish a quality control organization and cooperate with other ministries and national or professional bodies as well as international organizations in order to improve the quality, the packaging and the presentation of exported or exportable goods;
3. To assist exporters in practicing appropriate pricing policies;
4. To initiate promotional activities such as participation at fairs and specialized exhibitions, market research studies, sales missions, invitation of importers to Afghanistan, etc.;

5. To open up new markets with great sales potential in addition to those traditionally known, such as the Gulf States and Middle Eastern countries, Western and Eastern European markets;

6. To rationalize the export trade sector by creating professional grouping or association like the Carpet Guild, the Karakul Institute, the Raisin Board, the Handicraft Centre etc. These associations are mostly required in sectors where a large number of exporters, without any substantial financial backing, try to develop their sales abroad such as the medicinal herbs' exporters.

7. To create a market information flow in Afghanistan in order to enable exporters to respond to requirements of foreign markets and to encounter successfully the severe international competition;

8. To formulate and implement appropriate training programs for all interested parties and to make Afghan public opinion aware of problems of export promotion.

The Export Promotion Bank of Afghanistan is already established; its charter, reviewed by an UNCTAD inter-regional adviser, was approved by the Republican Government and accepted by the General Assembly of Shareholders. It will start its operations in a near future.

V. INTERNATIONAL ASSISTANCE

In addition to the on-going project of ITC/UNCTAD/GATT, the following projects are in the pipeline in the trade promotion field:

— Assistance in the management and organization of the handling and maintenance operations in Afghan ports at the Amu-Darya (UNCTAD/ILO);

— Assistance in the organization, management of foreign exchange transactions to the Export Promotion Bank (UNCTAD);

— Assistance to the Government of the Republic of Afghanistan in the creation of a national insurance market, including export credit insurance (UNCTAD);

— The Handicraft Center to handle all handicraft products – embroideries, stone carvings, wood carvings, etc., is also to be established soon.

— A regional project for marketing oriental carpets at the Western European and North American markets, of which the study phase is accomplished and at the beginning of the next year the market research and sales mission phase will start;

— A regional project for animal casings was completed and yielded appreciable results for Afghanistan.

Future external assistance might be required in the following fields:

- Re-enforcing operation and management of existing or to be established plants for fruit juice processing in Afghanistan;
- Establishment of an Afghan Skins Improvement Service (SIS);
- Establishment of an Afghan International Trucking Co.; in fact, the on-going ITC/UNCTAD/GATT project expects to be joined in a couple of weeks by a Transport Adviser who will assist the Ministry of Commerce in the solution of all the transport problems;
- Establishment of a wool yarn producing plant, especially in view of facilitating the production of non-traditional, but well marketable carpets from Afghanistan;
- Establishment of a national warehousing system on Afghan territory, including existing facilities, contributing to the promotion of Afghan exports;
- Creation of some fumigation plants to improve the quality of some export products such as raisins, cotton, etc.
- Transfer of technology in the field of trade negotiations through technical assistance of the international system in order to create a national nucleus for such negotiations and train people capable to assume the tasks (UNCTAD), and,
- An UNCTAD mission advising the Afghan Government on multinational trade negotiations is also expected.

Algérie – Etude de l'offre algérienne à l'exportation

(Méthode à suivre)

Printemps 1973

A. DESCRIPTION DU PRODUIT

- Identification en termes de nomenclature internationale (douane algérienne, NDB, CTCI) ;
- Description du produit, ses caractéristiques, variétés ;
- Qualités, spécifications techniques, contrôle de qualité ;
- Normes internationales.

B. L'ENTREPRISE

- Secteurs public et privé, monopoles, données globales par secteur ;
- Structure de/des entreprises, particulièrement celles actives en exportation ou marketing ;
- Bilan ou frais d'exploitation ;
- Localisation géographique des unités de production, distance des ports d'exportation, mode de transport utilisé ;
- Production et capacité de production par unité ;
- Equipement en laboratoire de recherche appliquée et moyens extérieurs utilisés ;
- Les moyens de promotion de vente mis en oeuvre (catalogues, participation aux manifestations commerciales, etc.) et les marques ;
- Expérience en matière d'exportation ;
- Problèmes d'exportation rencontrés ;
- Fiches des noms, adresses et téléphones des responsables de l'exportation au niveau de l'entreprise ;
- Fichier des clients ;
- Fichier des mises en rapport nouvelles.

C. PRODUCTION

1/ Production actuelle

- Calendrier et rythmes de la production ;
- Evolution de la production nationale (statistiques pour les cinq années écoulées), rendement moyen, taux d'accroissement annuel ;
- Analyse de l'utilisation de la capacité de production ;
- Analyse des stocks et des moyens de stockage ;

2/ Approvisionnements

- Evolution des importations de matières premières, de produits semi-finis (statistiques pour les cinq années écoulées), par pays de provenance ;
- Régime des importations y relatifs ;
- Importations éventuelles de produits similaires ;
- Prix à l'importation de ces approvisionnements extérieurs et leurs variations, par pays de provenance.

3/ Prix

- Produits agricoles : prix à la production fixés par les décrets de campagne ;
- Produits industriels ou miniers : prix de revient.

(4) Prévision de production

- Prévision de production pour les cinq prochaines années ;
- Projets d'investissement.

D. COMMERCIALISATION

1/ Consommation intérieure ou ventes sur le marché intérieur

- Consommation intérieure au cours des cinq dernières années, taux d'accroissement annuel ;
- Prévisions de la consommation intérieure ;
- Prix pratiqués sur le marché intérieur ;
- Réseau de distribution, intermédiaires, monopoles.

2/ Exportations

- Evolution des exportations au cours des cinq dernières années, par pays de destination, taux d'accroissement annuel, indice de croissance, valeurs minima et maxima par année, part de chaque marché extérieur dans les exportations totales ;
- Prix à l'exportation (FOB et CAF) ;
- Analyse de la structure des prix à l'exportation, incidences de la fiscalité intérieure et extérieure sur ces prix, réglementation des prix ;
- Moyens de transport utilisés, itinéraires, durée des transports maritimes, disponibilité des moyens de transport, installations portuaires ;
- Coûts de transports et leur incidence sur les prix à l'exportation ;
- Accords commerciaux bilatéraux, s'appliquant au produit étudié.

E. LES MARCHES EXTERIEURS

- La demande sur les marchés extérieurs ;
- La consommation et les prévisions de la consommation sur ces marchés ;
- Les circuits commerciaux ;
- Identification et caractéristiques des produits de la concurrence, analyse des importations de produits concurrents ;
- Droits de douane et taxes ;
- Régime d'importation ;
- Conditions de paiement, délais de livraison ;
- Accords commerciaux favorisant la concurrence.

Promotion of Afghan Exports

A Conceptual Framework

1. Marketing, a concept developed fifty years ago in the United States and subsequently adopted in the world of business, means that production activities in any field are geared to the needs and requirements of consumers, i.e. the markets. Therefore, farmers, co-operatives or manufacturers do not produce goods without knowing what the consumers or industrial users want to buy, but undertake market research, consumer inquiries, etc. to identify the real needs and actual requirements of their potential clients in order to produce goods according to these findings. Consequently, marketing is the whole process of getting goods from the producers to the end-users, and includes market research, product adaptation, packaging, labeling, transportation, distribution, sales promotion, merchandising, publicity, etc. – always with a view to satisfying the markets.

2. Promotion, in a strict commercial sense, means the application of modern techniques to increase sales of one's products on given markets. Among the most frequently used promotional techniques are participation at trade fairs and exhibitions, publicity campaigns with advertising in the mass media, merchandising, i.e. promotion at specific sales outlets such as department stores, giving special rebates to consumers on sales of a product during limited periods, etc.

Promotion of exports at national level, – as it is done in most developing countries, – is a much larger enterprise. In addition to the above commercial promotion techniques which are used to promote one country's export items, and not only that of one enterprise, there are many other tasks to be accomplished such as the creation of an extensive institutional framework for national export promotion, the formulation and implementation of Governmental policies aiming at the encouragement of exports like fiscal and financial incentives, setting up of training programs at all levels for management and technical personnel, introduction and application of new technologies in order to improve the quality of the country's export products that they meet international standards, and so on.

EXPORT PROMOTION IN AFGHANISTAN

1. Afghanistan is a least developed, land-locked country, remote from major world markets, and its exports consist mainly of raw or semi-processed agricultural and livestock products and, in a limited volume, handicrafts. Industrial exports are for the moment negligible.

2. The Government of the Republic of Afghanistan resolutely decided to choose promotion of the country's exports as the proper means for attaining the objectives of its economic and social development policies, namely that of raising the standard of living through increased income, creation of employment opportunities to eliminate unemployment, particularly for seasonally jobless in the rural areas; and, increasing the nation's foreign exchange revenues to finance expenditures geared to the nation's industrial development efforts. A natural corollary to any export promotion policy, and of great economic importance, is substitution of imports by locally made products.

3. Export promotion activities in Afghanistan, therefore, may be summed up under the following headings:

(i) Creation of an appropriate institutional framework: The Export Promotion Department of the Ministry of Commerce; sectoral, or professional organizations such as the Afghan Raisin Export Promotion Institute; special establishments to facilitate, finance and guarantee exports such as the Export Promotion Bank; efficient national insurance institutions, and adequate transport organizations, first of all the Afghan International Trucking Company, these constitute the present institutional framework.

(ii) Adaptation of Afghan export products' quality to foreign market requirements: This is a field which is beyond proper export promotion activities, but unavoidable if the export drive is to be successful. This means that action at all levels are to be undertaken to improve the quality of products, – selection, cleaning, drying, salting, grading, etc.; establishment of national standards and supervision of their application as well as introduction of quality control by adequately trained inspectors, and many other measures related to the production of goods.

(iii) Application of marketing techniques in respect of each export item: Upgrading packaging and labeling, initiation of realistic cost and pricing policies, selection of suitable distributors (importers, wholesalers, and retailers like department stores) at foreign markets, systematically organized participation at trade fairs and exhibitions, sending sales missions to target markets, invitation of foreign businessmen to Afghanistan, and so on.

The Export Promotion Department of the Ministry of Commerce, with the assistance of the International Trade Centre from Geneva, financed by the Swedish International Development Authority, has already started to tackle these problems and is active to resolve them according to priorities set by the Government.

Afghanistan's Foreign Trade in 1356

by

Victor Segesvary, PhD., D.D.

ITC Project Manager

[No foreign trade statistics were published by the Central Statistical Office since 1354. The present analysis is based on statistical figures obtained from the CSO, the Da Afghanistan Bank and the Ministry of Commerce which, however, frequently show discrepancies, especially in regard to 1356 imports. The 1356 figures, in general, should be considered as preliminary which might be adjusted later when the CSO is releasing the final results for the year.]

August 1978

A. THE GENERAL TREND

Total exports of Afghanistan grew by 5%, if calculated in US dollars, but dropped by 5.9%, if calculated in Afghanis, between 1355 and 1356. On the other hand, total imports increased by 20.2% in 1356 compared to the previous year, on the basis of US dollar value, but only by a modest 7.8% on the basis of their value in the national currency.

The coverage of total imports by total export earnings in terms of US dollar as well as the Afghanis was 112% in 1355; it shrank to 98.2% in 1356.

The fact that the growth of total exports slowed down to the extent shown above in terms of US dollars, compared to a very vigorous growth during the past years when progression was mostly at double digit rates, clearly indicates the impact of the Afghani's appreciation in respect to the US dollar. This phenomenon is even more striking when export growth is calculated on the basis of receipts in Afghanis as it shows a real decline (-5.9%) between 1355 and 1356.

Conclusions of the following analysis of export performance by product groups demonstrate this finding. For example, for dried fruits other than raisins and edible nuts, the value of exports in 1356 rose by 8.7% if calculated in dollars, but remained stagnant in terms of Afghanis, although the exported volume increased by 23%. Most probably, quality, grading and calibration problems concurred in reducing export prices, nevertheless the increased volume compensated exporters for lesser earnings. In the case of hides and skins, the 4.9% rise in dollar value of exports, despite a 4.2% drop in volume, conceals an 11.9% decline Afghani export earnings.

Exports of most items subsidized through premium rate payment by the Da Afghanistan Bank, such as raisins, carpets, fertilizers and natural gas, did relatively well. The two exceptions are cotton and wool for which the decrease in Afghani receipts would have been sharper had the premium rate not been applied. Of course, other factors also played an important role as indicated by the fact that the volume of exported wool almost doubled, whereas earnings in dollars and Afghanis declined by 27.8 and 35.5%, respectively.

There is no indication of any impact of the Afghani's appreciation on imports. The rise in the value of imports, almost 30% in dollar terms but only 7.8% if calculated in Afghanis, is quite normal, even low compared to the experience of most developing countries. This shows that mechanisms normally at work in situations when the currency of a country appreciates against hard foreign currencies and result in soaring imports as well as declining exports, are functioning in the case of Afghanistan only as far as the second part of the proposition is concerned. The appreciation of the Afghani is mostly a phenomenon dependent on domestic factors, such as the limited availability of money supply on the domestic market. This factor imposes limits on the expansion of imports, even if their cheapness would normally induce buyers to increase purchases rapidly and in a large extent.

B. EXPORT ANALYSIS

1. THE GEOGRAPHICAL PATTERN OF EXPORTS

As the following table shows, the geographical pattern of exports, in respect, particularly, of the five major clients of Afghanistan, did not change considerably between 1355 and 1356. The Soviet Union remains the most important market with its share of total exports increasing from 27.1% to 37.5%. The United Kingdom's share sharply declined from 18.7% of the total to 11.8%, placing it in the third place, whereas Pakistan, representing practically the same percentage share as a year before (12.3 against 12.2%), took the second position. India and the Federal Republic of Germany, although with slightly lesser share of the total (7.6 and 5.6% against 8.1 and 6% respectively), remained in fourth and fifth positions.

Among markets, representing less than 5% of total exports, striking changes took place: the falling back of the Netherlands and France, from the 7th and 9th positions, respectively, to the 15th and 16th positions (in terms of percentage from 3 and 2,6% of the total to 0,6 and 0,5%), and by the increasing importance of Saudi Arabia (4..6% of total exports against 2.2%) and Switzerland (2.5 from 2%) which took the 6th and 9th places in 1356 compared to the 11th and 12th positions in 1355.

The increase of the share of total exports of the People's Republic of China, from 1.4 to 2.2%, was of minor significance, although its ranking went up from 15th to the 10th position between 1355 and 1356, as its Afghan imports mainly consisted of cotton. The growth in Japan's share from 1 to 1.5% of the total (placing it in 13th as against the 16th position) is negligible when compared to the enormous share of Afghan imports from Japan.

In addition to Saudi Arabia, the Syrian Republic is Afghanistan's second most important market in the Middle East with about the same share during the last two years (2.9 and 2.8% of the total), purchasing principally pistachios and other edible nuts. Exports to Kuwait remained about the same level in 1356 as in 1355, only 0.4 and 0.3% of the total. These figures fully support the Government's decision to assign high priority to the development of Afghan exports to the Arabian Gulf States and Middle Eastern countries.

Iran's share of Afghan exports decreased further, from 1.7 to 0.8%, between 1355 and 1356, due to the fact that most products exported by Afghanistan are banned by the Iranian Government.

The Geographical Pattern of Exports

<u>Nr.</u>	<u>Country</u>	<u>Exports in 1'000 US\$</u>		<u>Percentage of total</u>		<u>Position</u>
		<u>1356</u>	<u>1355</u>	<u>1356</u>	<u>1355</u>	<u>in 1355</u>
1.	USSR	117'413	80'648	37.5	27.1	1
2.	Pakistan	38'231	36'668	12.2	12.3	3
3.	United Kingdom	37'012	55'580	11.8	18.7	2
4.	India	23'936	24'110	7.6	8.1	4
5.	Germany, F.R.	17'411	17'879	5.6	6.0	5
6.	Saudi Arabia	14'444	6'585	4.6	2.2	11
7.	USA	11'378	12'535	3.6	4.2	6
8.	Syria	8'758	8'805	2.8	2.9	8
9.	Switzerland	7'897	5'899	2.5	2.0	12
10.	China, P.R.	6'836	4'295	2.2	1.4	15
11.	Italy	5'513	6'598	1.8	2.2	10
12.	Czechoslovakia	5'193	5'369	1.7	1.8	13
13.	Japan	4'624	2'922	1.5	1.0	16
14.	Iran	2'634	5'129	0.8	1.7	14
15.	Netherlands	1'745	8'957	0.6	3.0	7
16.	France	1'662	7'765	0.5	2.6	9
17.	Kuwait	1'160	866	0.4	0.3	17
18.	Africa	879	467	0.3	0.2	19
19.	Lebanon	399	557	0.1	0.2	18

2. THE PRODUCT STRUCTURE OF EXPORTS

Between 1355 and 1356 leading Afghan export items continued to be cotton, raisin, natural gas, carpets and gilems as well as dried fruits and nuts (63% of the total). The share of cotton of total exports however, shrunk from 20.6 to 17.6%, while that of raisins increased from 13.2 to 16.2%. Natural gas stayed almost at the same level, 12.6% against 13.2% a year before. On the other hand, carpets and gilems occupied the 4th place in 1356 representing 12.3% of total exports, compared to only 7.8% in 1355 (6th place); dried fruits and nuts progressed from the 5th to the 4th position between the two years under consideration, with 9.1% share of the total against 8.8% in the preceding year. They were followed by fresh fruits, medicinal herbs and spices, karakul, hides and skins, wool, animal hair and oil seeds. Casings, fertilizers, pustins and pustinchas represented less than 1% of total exports during both years. It should be noted that medicinal herbs and spices increased their share of total exports from 3.9 to 6.0%, while that of karakul, oil seeds and wool decreased from 7.0, 3.4 and 2.4% to 5.9, 1.2 and 1.7%, respectively.

Agricultural products represented thus 57.4% of total exports, while products of animal origin 12.2%, those of mineral origin 12.6% and industrial goods 12.8%.

The situation with respect to individual product groups was as follows:

(i) Animal casings: Exports increased by 31.6% (dollar basis) despite the fact that in volume they went down by 41% (up 17.5% only in Afghani terms). Of the two traditional markets, West Germany increased its purchases (+ 51.5%), but sales to Switzerland dropped by 7.3%. A new promising market is France.

(ii) Fresh fruits: Exports dropped slightly by 2.8%, but all major markets (neighboring countries) considerably increased their imports of Afghan fruits. Pakistan is by far the largest consumer with a share of 74% of the total, followed by India with 18.4% and the Soviet Union with 8.7%.

(iii) Raisins: Exports grew by a remarkable 28.6% in dollar terms, although in volume they dropped slightly because of persisting high international prices. The increase in Afghani was only 17.2%. The Soviet Union and the United Kingdom almost doubled their imports of Afghan raisins; whereas both Pakistan and the Federal Republic of Germany increased their purchases by more than 25% between 1355 and 1356. Exports to India dropped by about one-fifth, and the United States did not figure among the buyers. The USSR is by far the most important client for Afghan raisins.

(iv) Other dried fruits and edible nuts: Exports increased by 8.7% in US dollar terms though in volume the rise was above 23%. In Afghani terms export receipts remained practically unchanged (+0.5%). Pakistan and the USSR purchased approximately 50% more than the year before and West Germany more than doubled its imports from Afghanistan. Indian purchases dropped once again (– 25.4%) as well those by Syria. India is the largest market for Afghan dried fruits and nuts (25.1%), followed by Syria, (the foremost importer of Afghan pistachios), Pakistan and the USSR.

(v) Medicinal herbs and spices: Exports grew by an astonishing 61.6% (dollar terms), almost as much as in volume, but in Afghanistan the rise was again smaller (+47.8%). The striking evolution in this sector is the very considerable increase of Japanese and American purchases (mainly liquorice root) and the almost as high increase of exports to Africa (cumin seeds). The USA is the leading importer of Afghan products in this group, followed by Japan and India.

(vi) Oil seeds: Exports fell significantly by 64.9%, to all major markets, Pakistan, the USSR and Iran. The Soviet Union with approximately 30% of total exports remains the best market, followed by Iran and, to a lesser extent, Pakistan.

(vii) Carpets and gilems: Exports showed a spectacular increase of 65.7% (dollar terms), while growth in volume was only 22.7% and 48% in terms of Afghanistan. Saudi Arabia is by far the most dynamic market for Afghan carpets and gilems (+124%), though West Germany also bought 80% more compared to 1355. These two countries absorbed more than 50% of total carpet and gilem exports, whereas the share of the traditional markets, Switzerland the United Kingdom, shrunk by some percentage points.

(viii) Cotton: Exports went down by 10.3% in dollar terms (31% in volume) and almost by 20% in Afghanistan. Soviet purchases rose by 180%, but those of the United Kingdom and of the Federal Republic of Germany fell by more than 80%. Representing 71.5% of total Afghan cotton exports, the Soviet Union is the most important market (around 80%, if exports to all Socialist States are added up).

(ix) Hides and skins: A modest, 4.9% growth of exports took place on dollar basis, although in volume a 4.2% drop occurred, while export receipts in Afghanistan declined by 11.9%. Once again the USSR increased its purchases the most (178%) together with Iran (202%). Exports to Italy fell considerably, but only slightly to the USA. The Soviet Union and the USA are the biggest markets.

(x) Karakul: Foreign sales decreased by 11.4% (dollar terms), by 15% in volume and 23.7% in Afghanistan. The London auction absorbed 90% of the total, although sales there went down by 12.5%. The Soviet Union's share was 8.1%.

(xi) Wool and animal hair: Exports declined by 27.8% in dollar value despite the fact that the exported volume almost doubled; the drop was 35.5% in Afghanistan. The Soviet Union continued to be the only market for this product, with the exception of last year, when the USA bought some 10% of total exports. Soviet imports fell by nearly 20% in 1356.

(xii) Natural gas: Exports stayed at about the same level with the USSR as the sole client.

(xiii) Pustins and pustinchas: The already diminishing exports further dropped by 45% (about the same in volume and in Afghanistan terms).

(xiv) Fertilizer: Exports to Pakistan almost doubled between the two years.

Exports 1355/56

Vol. tons, if not otherwise specified

Value: '000Afs ./ '000US\$

	Product Destination	<u>1355</u>			<u>1356</u>			<u>% change</u>	<u>% of</u>
		Vol.	Afs	US \$	Vol.	Afs.	US \$	56/55 US\$	1356 Total
1.	<u>Animal casings,</u> of which	2'316*	95'028	1'755	1'352*	11'653	2'309	+ 31.6	100.0
	Germany, Fed. Republic of	1'131	47'336	872	735	63'924	1'321	+ 51.5	57.2
	Switzerland	594	24'878	464	277	20'403	430	- 7.3	18.6
	France	31	1'259	23	120	10'737	217	+840.3	9.4
2.	<u>Fresh fruits,</u> of which	119'407	1'294'957	23'484	109'299	1'175'773	23'102	- 2.8	100.0
	India	13'354	131'029	2'470	14'038	205'782	4'209	+ 70.4	18.4
	Pakistan	102'481	1'109'785	19'829	88'372	813'862	16'898	+164.7	74.0
	USSR	3'767	54'143	1'058	6'881	97'780	1'995	+ 87.0	8.7
3.	<u>Raisins,</u> of which	56'965	2'122'626	39'540	56'744	2'488'550	50'855	+ 28.6	100.0
	USSR	18'892	582'896	10'765	26'138	984'823	20'522	+ 90.6	40.4
	Pakistan	4'609	208'806	3'860	4'657	238'410	4'928	+ 27.7	9.7
	India	6'475	482'995	8'736	5'025	330'786	6'824	- 21.9	13.4
	UK	9'089	319'030	5'878	12'178	550'548	11'537	+ 96.3	22.7
	Germany, Fed. Republic of	1'809	60'356	1'175	1'618	71'367	1'460	+ 24.3	2.0
	USA	3'438	116'138	2'277	—	—	—	—	—

* '000 coils

contd.

Exports 1355/56 (contd.)

Vol. tons, if not otherwise specified

Value: '000Afs ./ '000US\$

	Product Destination	1355			1356			% change	% of
		Vol.	Afs	US \$	Vol.	Afs.	US \$	56/55 US\$	1356 Total
4.	<u>Other dried fruits & nuts</u> , of which	15'995	1'402'233	26'241	19'727	1'404'239	28'528	+ 8.7	100.0
	Pakistan	4'775	142'801	3'551	6'379	269'349	5'415	+ 52.5	19.0
	India	4'724	522'782	9'588	3'752	347'467	7'157	- 25.4	25.1
	USSR	4'294	159'160	3'006	5'501	217'860	4'371	+ 45.4	15.3
	Syria	1'203	262'861	6'964	2'059	327'575	6'787	- 2.5	23.8
	Germany, Fed. Republic of	391	60'021	1'143	944	107'290	2'425	+ 112.2	8.5
5.	<u>Medicinal, herb & spices</u> , of which	19'753	644'855	11'630	33'049	921'075	18'794	+ 61.6	100.0
	Pakistan	3'608	115'376	2'108	1'987	95'709	1'986	- 5.6	10.6
	India	1'358	187'961	3'317	1'352	172'136	3'522	+ 6.2	18.7
	Japan	3'363	67'514	1'240	9'087	180'102	3'642	+ 193.7	19.4
	Africa	235	26'432	463	727	44'358	888	+ 91.8	4.7
	USA	7'458	157'052	2'834	14'662	307'886	6'308	+ 122.6	33.6
6.	<u>Oil seeds</u> , of which	34'758	542'250	10'245	8'094	173'359	3'598	- 64.9	100.0
	Pakistan	7'566	145'054	2'842	1'488	25'832	528	- 81.4	14.7
	USSR	7'724	140'031	2'623	3'173	52'374	1'066	- 59.4	29.6
	Iran	13'864	140'974	2'590	1'971	54'181	1'142	- 55.9	31.7

contd.

Exports 1355/56 (contd.)

Vol. tons, if not otherwise specified

Value: '000Afs ./ '000US\$

	Product Destination	1355			1356			% change	% of
		Vol.	Afs	US \$	Vol.	Afs.	US \$	56/55 US\$	1356 Total
7.	<u>Carpets & rugs,</u> of which	739'000*	1'262'224	23'189	907'000*	1'867'111	38'429	+ 65.7	100.0
	Saudi Arabia	362'000	342'625	6'359	488'000	686'301	14'243	+124.0	37.1
	Switzerland	119'000	277'873	5'081	118'000	350'725	7'204	+ 41.8	18.7
	Germany, Fed. Republic of	112'000	297'826	5'505	165'000	481'952	9'911	+ 80.0	25.8
	UK	58'000	131'146	2'394	40'000	106'369	2'195	– 8.3	5.7
8.	<u>Cotton,</u> of which	49'816	3'358'485	61'378	34'152	2'699'497	55'040	– 10.3	100.0
	USSR	10'596	758'626	14'044	23'580	1'919'161	39'375	+180.4	71.5
	China, People's Republic of	—	—	—	2'000	173'926	3'440	—	6.3
	UK	22'320	1'464'254	26'372	4'212	245'503	4'957	– 81.2	9.0
	Czechoslovakia	2'176	166'625	2'916	2'505	178'524	4'333	+ 48.6	7.9
	Pakistan	—	—	—	1'419	93'998	1'898	—	3.4
	Germany, Fed. Republic of	5'464	357'447	6'556	834	52'319	1'026	– 84.4	0.9
	France	3'995	326'474	6'392	—	—	—	—	—
	Netherlands	4'063	282'079	5'045	—	—	—	—	—

* Sqms

contd.

Exports 1355/56 (contd.)

Vol. tons, if not otherwise specified
Value: '000Afs ./ '000US\$

	Product Destination	1355			1356			% change	% of
		Vol.	Afs	US \$	Vol.	Afs.	US \$	56/55 US\$	1356 Total
9.	<u>Hides & skins,</u> of which	3'247*	643'263	11'773	3'112*	566'477	12'353	+ 4.9	100.0
	USSR	314	57'125	1'088	997	147'093	3'029	+178.4	24.5
	Pakistan	302	63'318	1'172	188	63'094	1'287	+ 9.8	10.4
	Italy	1'364	182'130	3'341	592	105'768	2'123	- 36.8	17.2
	USA	669	156'982	2'820	718	136'303	2'768	- 1.8	22.4
	Iran	21	13'054	236	87	34'707	715	+202.0	5.8
	Czechoslovakia	417	71'095	1'302	196	100'644	625	- 52.0	5.1
10.	<u>Karakul,</u> of which	1'114	1'184'378	20'820	947	903'038	18'443	- 11.4	100.0
	UK	990	1'079'732	18'984	821	813'178	16'609	- 12.5	90.1
	USSR	114	96'403	1'691	126	89'573	1'828	+ 8.1	9.9
11.	<u>Wool & hair,</u> of which	4'991	392'751	7'201	9'904	253'173	5'198	- 27.8	100.0
	USSR	4'644	348'253	6'370	9'904	253'173	5'198	- 18.4	100.0
	USA	290	39'584	739	—	—	—	—	—

* 1'000 pieces

contd.

Exports 1355/56 (contd.)

Vol. tons, if not otherwise specified

Value: '000Afs ./ '000US\$

	Product Destination	1355			1356			% change	% of
		Vol.	Afs	US \$	Vol.	Afs.	US \$	56/55 US\$	1356 Total
12.	<u>Natural Gas,</u> of which	2'415**	2'161'203	39'540	3'829**	1'908'059	39'342	– 0.5	100.0
	USSR	2'415	2'161'203	39'540	3'829	1'908'059	39'342	– 0.5	100.0
13.	<u>Pustins &</u> <u>Pustinchas,</u>	22'447*	16'620	302	12'077*	8'110	166	– 45.0	100.0
14	<u>Fertilizer,</u> of which	6'081	39'516	775	13'040	78'661	1'567	+102.1	100.0
	Pakistan	6'081	39'516	775	13'040	78'661	1'567	+102.1	100.0
TOTAL		—	16'233'510	297'327	—	15'272'810	313'375	+ 5.4	—

* 1'000 pieces

** million Qms³

C. IMPORT ANALYSIS

1. THE GEOGRAPHICAL PATTERN OF IMPORTS

Some considerable changes took place between 1355 and 1356 in the positions occupied by major suppliers to Afghanistan, with the exception of Japan which occupied first place during both years; Japan in fact increased its share of total Afghan imports from 26.4 to 31.5%. The Soviet Union came second in 1355 (18.3% of the total), but fell back to the 4th position in 1356 with only 5.7%. The German Federal Republic which was 4th in 1355 (7.7%) ranked second position in 1356 (8.3%). In both years, India was the third major supplier, but its share of the total shrunk from 9.7 to 7.8%. Two countries exchanged their places, Iran went back from the 5th to 6th place and the United Kingdom progressed from the 6th to the 5th, although their part of the total dropped from 7.7 and 7.2% to 5.3 and 5.2%, respectively.

Following this group of the six major suppliers, the share in 1356 of the next 11 countries was below 5% each in the following order: Pakistan, Hong-Kong, USA, Singapore, France, People's Republic of China, Netherlands, Republic of Korea, Sri Lanka, Switzerland and Italy. Others individually represented less than 1% of total imports.

It is remarkable that Afghan imports, with the exception of Japan which stands for one-third of the total, are largely spread among suppliers indicating, probably, an optimization of supply sources,

Major Suppliers of Afghanistan

1355–1356

<u>Nr.</u>	<u>Product/Origin</u>	<u>Value in '000 US\$</u>		<u>Percentage of total</u>		<u>Position in</u>
		<u>1356</u>	<u>1355</u>	<u>1356</u>	<u>1355</u>	<u>1355</u>
1.	Japan	100'641	69'929	31.5	26.4	1
2.	Germany, F.R	26'392	19'200	8.3	7.7	4
3.	India	24'848	25'703	7.8	9.7	3
4.	USSR	18'162	48'541	5.7	18.2	2
5.	United Kingdom	16'817	11'244	5.3	7.2	6
6.	Iran	16'573	20'483	6.2	7.7	5
7.	Pakistan	10'125	9'669	3.2	3.6	8
8.	Hong-Kong	9'302	9'569	2.9	2.5	9
9.	USA	7'429	9'476	2.3	3.6	7
10.	Singapore	6'282	3'888	2.0	1.5	13
11.	France	6'298	5'866	2.0	2.2	10
12.	China, P.R.	5'539	3'286	1.7	1.2	15
13.	Netherlands	5'566	3'512	1.7	1.3	14
14.	Korea, R.	4'648	2'612	1.5	0.9	16
15.	Sri Lanka	4'314	1'785	1.4	0.7	17
16.	Switzerland	4'213	5'472	1.3	2.1	11
17.	Italy	3'644	4'564	1.1	1.7	12

2. THE PRODUCT STRUCTURE OF IMPORTS

Major imported product groups did not change between 1355 and 1356: clothing, various textiles (threads, rayon and other textiles, except cotton textiles), petroleum products, tea, tires and tubes, and sugar. Together they represented 67% of total imports in 1356 and 58% in 1355. Other groups, each representing 1 to 4% of the total, were pharmaceuticals, chemicals, automobiles and spare parts, electric and non-electric machines, including sewing machines, and vegetable oil (the latter only in 1356). Tobacco and tobacco products, cotton textiles, bicycles and spare parts, tractors and footwear did not reach the 1% mark.

Individual product groups were characterized by the following:

(i) Sugar: Imports rose by 29.8%. Those originating from the Federal Republic of Germany increased by one and a half times, those from the USSR by 76.8%; purchases from all other sources declined. Consequently, Germany became the first supplier taking the place of the Soviet Union.

(ii) Tea: Purchases grew at about the same pace as those of sugar; India remained the largest supplier though its sales declined by 13.8%,

(iii) Tobacco and tobacco products: The entire 12.4% increase of imports came from the USA which strengthened its position as the first supplier of this product group to Afghanistan.

(iv) Petroleum products: A reduction of consumption is reflected by the small drop in imports (–3.7%). The interesting feature is the dynamism of imports from the United Kingdom (up 75.7%), although the Soviet Union remains by far the largest supplier.

(v) Pharmaceuticals: Imports rose by 13.3% despite the fact that purchases from traditional suppliers declined. Imports from India increased ten folds making it the second major supplier after West Germany with the United Kingdom in the third place.

(vi) Chemicals, including matches and fertilizers: Imports grew considerably (up 176.2%) predominantly from the United Kingdom and the USSR; these countries increased their sales to Afghanistan more than fifteen times. Purchases from the USA declined by one-fifth. The leading supplier is now England.

(vii) Tires and tubes: Imports increased by 3.1% with purchases originating mostly (90%) from Japan.

(viii) Cotton textiles: Imports decreased by 9.7% with substantial drops in purchases from the USSR (–61.4). All other suppliers increased sales, particularly those of Japan (up 125%) which took the first place. Even India overtook the Soviet Union.

(ix) Electric and non-electric machines, including sewing machines: Total supplies from abroad rose by 7.6%; imports from all countries increased, except those originating from Pakistan. Main suppliers were India, Japan and West Germany.

(x) Automobiles: Imports almost doubled; Germany and Japan supplying about two-third of Afghan imports.

(xi) Spare parts: Purchases from abroad went up by 187%. They dropped by 64 and 79%, respectively, from Japan and the USSR, and by 19% from West Germany, while the United Kingdom (59% of total imports) and the USA became major suppliers.

(xii) Bicycles and parts: The 22.8% rise came principally from British, Japanese and Indian imports, the USSR's share was cut by half and imports from West Germany completely ceased.

(xiii) Tractors: Imports declined by 30.5%. Practically all purchases originated from the Soviet Union.

(xiv) Footwear: New suppliers of the sharply reduced imports (-1.6%) were the USSR and Iran, the latter replaced such traditional suppliers as West Germany, the USA and the United Kingdom.

(xv) Clothing (used and new): The leader among imported items grew by more than 100% with the greatest increase of purchases in West Germany and Pakistan; Germany and Japan were the largest suppliers.

Afghan Imports 1355–1356

<u>Nr.</u>	<u>Product / Origin</u>	<u>Total in '000 US\$</u>		<u>% change</u> <u>in \$</u>	<u>% of 1356</u>
		<u>1355</u>	<u>1356</u>	<u>1355/56</u>	<u>total</u>
1.	<u>Sugar</u> , of which	12'768	16'569	+ 29.8	100
	USSR	4'019	7'104	+ 76.8	42.9
	Germany, Federal Republic of	3'655	9'465	+ 58.2	57.1
2.	<u>Tea</u> , of which	21'535	27'935	+ 29.7	100
	India	17'793	15'346	– 13.8	54.9
3.	<u>Vegetable oil</u> , of which	—	9'790	—	100
	USSR	—	3'257	—	33.3
	Japan	—	635	—	6.5
4.	<u>Other food products</u> , of which	13'275	—	—	—
	USSR	2'238	—	—	—
	USA	2'609	—	—	—
5.	<u>Tobacco and products</u> , of which	2'737	3'078	+ 12.4	100
	USA	1'308	1'693	+ 29.4	55.0
	Pakistan	1,274	1'192	– 6.4	38.7
6.	<u>Petroleum products</u> , of which	35'752	34'426	– 3.7	100
	USSR	20'080	20'703	+ 10.0	60.1
	United Kingdom	1'163	2'043	+ 75.7	5.9
	Iran	n.a.	9'211	—	26.6

contd.

Afghan Imports 1355–1356 (contd.)

<u>Nr.</u>	<u>Product / Origin</u>	<u>Total in '000 US\$</u>		<u>% change</u> <u>in \$</u>	<u>% of 1356</u>
		<u>1355</u>	<u>1356</u>	<u>1355/56</u>	<u>total</u>
7.	<u>Pharmaceuticals</u> , of which	10'048	11'384	+ 13.3	100
	Germany, Federal Republic of	1'848	1'379	– 25.4	12.1
	United Kingdom	877	824	– 6.0	7.2
	India	111	1'162	9 times	10.2
8.	<u>Chemicals</u> , of which	4'097	11'318	+ 176.2	100
	Germany, Federal Republic of	2'280	1'796	– 21.2	15.9
	USA	398	6'318	15 times	55.8
	United Kingdom	292	207	– 29.1	1.8
	Pakistan	245	208	– 15.1	1.8
	India	37	697	18 times	6.2
	USSR	254	1'805	8 times	15.9
9.	<u>Tires and tubes</u> , of which	18'733	19'308	+ 3.1	100
	Japan	16'897	17'390	+ 2.4	90.1
10.	<u>Cotton textiles</u> , of which	2'987	2'697	– 9.7	100
	USSR	1'656	638	– 61.4	23.7
	India	595	675	+ 13.4	25.0
	Japan	416	934	+ 124.5	34.6
	Pakistan	209	1'690	7 times	62.7

contd.

Afghan Imports 1355–1356 (contd.)

<u>Nr.</u>	<u>Product / Origin</u>	<u>Total in '000 US\$</u>		<u>% change in</u>	<u>% of 1356</u>
		<u>1355</u>	<u>1356</u>	<u>\$</u> <u>1355/56</u>	
11.	<u>Other textiles</u> , of which	21'719	66'971	+ 208.3	100
	Japan	20'753	52'259	+ 151.8	78.0
12.	<u>Electric & non-electric equipment</u> , of which	3'895	4'191	+ 7.6	100
	Pakistan	902	355	– 60.6	8.5
	Germany, Federal Republic of	220	563	+ 156.0	13.4
	India	46	799	17 times	19.1
	Japan	15	598	52 times	14.3
13.	<u>Automobiles</u> , of which	3'981	10'780	+ 170.7	100
	Japan	148	3'097	20 times	28.7
	Germany, Federal Republic of	774	3'932	+ 408.0	36.5
	Czechoslovakia	1'763	12	– 99.3	—
14.	<u>Spare parts</u> , of which	2'847	8'183	2.5 times	100
	Germany, Federal Republic of	606	491	– 19.0	6.0
	Japan	1'900	688	– 63.8	8.4
	USSR	289	60	– 79.2	0.7
	USA	4	755	180 times	9.2
	United Kingdom	15	4'861	322 times	59.4

contd.

Afghan Imports 1355–1356 (contd.)

<u>Nr.</u>	<u>Product / Origin</u>	<u>Total in '000 US\$</u>		<u>% change</u> <u>in \$</u>	<u>% of 1356</u>
		<u>1355</u>	<u>1356</u>	<u>1355/56</u>	<u>total</u>
15.	<u>Bicycles and parts</u> , of which	1'391	1'708	+ 22.8	100
	United Kingdom	921	—	— 100.0	—
	Japan	146	250	+ 71.2	14.6
	India	—	560	—	32.8
	USSR	118	58	— 50.8	3.4
16.	<u>Tractors</u> , of which	760	528	— 30.5	100
	USSR	151	523	+ 188.7	99.1
	United Kingdom	112	—	—	—
	Japan	42	—	—	—
	India	456	—	—	—
17.	<u>Footwear</u> , of which	4'123	2'408	— 41.6	100
	USSR	—	1'727	—	71.7
	Iran	—	403	—	16.7
	United Kingdom	168	21	— 87.5	0.9
	Germany, Federal Republic of	332	132	— 60.2	5.5
	USA	320	—	—	—

contd.

Afghan Imports 1355–1356 (contd.)

<u>Nr.</u>	<u>Product / Origin</u>	<u>Total in '000 US\$</u>		<u>% change</u> <u>in \$</u>	<u>% of 1356</u>
		<u>1355</u>	<u>1356</u>	<u>1355/56</u>	<u>total</u>
18.	<u>Clothing</u> , of which	41'559	85'259	+ 105.2	100
	Japan	12'510	23'446	+ 87.4	27.5
	Germany, Federal Republic	4'546	11'162	+ 45.5	13.1
	Pakistan	2'804	6'176	+ 120.2	7.2
	United Kingdom	2'714	5'008	+ 84.5	5.9
	India	3'383	4'361	+ 28.9	5.1
TOTAL		265'048	319'246	+ 20.4	—

Working Paper
for the 1978 Negotiations Between
the Government of the Republic of Afghanistan and
the European Communities

January 1978

Background

The Afghan Government had planned since the sixties to approach the European Communities with a view to establish close co-operation between Afghanistan and the EC aimed at expanding trade, obtaining financial and technical assistance, and food aid when ever required by the Afghan Government.

At the invitation of the Ministry of Commerce, a five member delegation from the EC visited Afghanistan in July 1976 (see Annex 1 for the list of members). The delegation primary objective was to hold a seminar on the EC's Generalized System of Preferences (GSP) scheme, which took place at the Kabul Intercontinental Hotel from 21st to 22nd July. Following the seminar official negotiations were held between the Afghan and EC delegations (the list of the members of the Afghan delegation is given in Annex 2) exploring possibilities for trade and industrial co-operation between the two parties, and obtaining financial and technical assistance as well as food aid for Afghanistan from the EC. The Afghan delegation presented a series of requests. These were discussed in some detail in Kabul, and the EC delegation promised to consider again all items in Brussels. In the course of these negotiations the EC delegation pointed out that for purposes of future co-operation it would prove necessary and beneficial for the Afghan Government to entrust one of its West European embassies with the responsibility of representation to the EC in Brussels.

In January 1977, the EC Council of Ministers, at the proposal of the Brussels Commission, approved the first ever, though limited, package of assistance to Afghanistan. This was to be considered a historic initial step in the relation of Afghanistan and the European Communities on the road to a possible long-term co-operation.

The assistance package for 1977 included:

1. *Travel and subsistence expenses of an Afghan trade delegation to EC Member States.*

The delegation, headed by M. Farid Rafiq, President of the Export Promotion Department, Ministry of Commerce made a three-week's tour of the EC Member States last October. As previously agreed with Brussels, members of the delegation were selected from among exporters of four product groups: cotton, carpets, nuts and customs jewelry. The mission scored great success and sales contracts signed during the mission and orders placed subsequently amounted to millions of US dollars. It is foreseen that another trade delegation will be invited by the EC in 1978 composed of representatives from other trade sectors.

2. *Three consultants, each for 3 months, to assist the Government in the vital areas of quality control and transport arrangements.*

The three consultants will respectively be engaged in cotton grading, sheep and goat skins grading, and in studying air transportation arrangements for afghan exports to the Gulf States' markets and Saudi Arabia. Afghanistan has not yet benefited from these consultancy services, probably due to recruitment difficulties.

3. *Financial assistance of maximum US\$1,000 for Afghan participation at a trade fair within the EC.*

Afghanistan was present at the Handicraft Trade Show in Copenhagen from 28 September through 2 October 1977; space rental, air ticket of the official representative (Director of the Handicraft Emporium) and air freight cost of samples sent were met by the EC. The representative's subsistence costs were covered by the ITC project.

4. *Publication of the Handicraft Catalogue in one of the Community languages.*

As the catalogue, prepared with the financial and technical assistance of the ITC project, was not ready before January 1978, its publication by the EC had to be postponed until spring 1978. The EC will most probably have it published in a Community language other than English from assistance funds earmarked for 1978.

5. In accordance with the suggestions made by the EC delegation in July 1976, the Council of Ministers approved sending a high level fact-finding mission to Afghanistan in 1977. The initial timing of the mission was for May, but was postponed to November 1977. However, it had to be postponed again as not enough documentation and statistical information on Afghanistan required for the mission's preparatory work could be sent to Brussels. It is hoped that with the documentation and information at its disposal the Mission can come to Kabul in May 1978.

In May 1977, the head of the Asia desk of the Brussels Commission, Mr. J. Hansen, accompanied by Mr. M. Drury, Principal Administrator, visited Kabul and had talks with the Minister and Deputy Minister of Commerce and other officials of the Ministry.

The Afghan Ambassador to Paris was accredited to the European Communities and presented his credentials at the end of 1977.

The Ministry of Commerce communicated a list of requests to Brussels for approval by the Council of Ministers within the framework of the 1978 program (Annex 6).

Guidelines for Negotiating With the Delegation of the European Communities

A TRADE, FINANCIAL AND TECHNICAL ASSISTANCE AND FOOD AID CO-OPERATION AGREEMENT – MAY 1978

Taking into account the will of the European Communities to help Afghanistan in its economic and social development, negotiations between the two parties should be based on the following guidelines:

BROAD OBJECTIVES

Afghanistan as a least developed, land-locked country wishes to secure from the EC such advantages as granted by it to the 46 African, Caribbean and Pacific countries within the framework of the Lomé Convention, namely:

- Preferential treatment in its trade relations with the EC and stabilization of its earnings from exports to the EC;
- Large-scale industrial co-operation;
- Financial and technical assistance in agriculture, industry, trade promotion, vocational training and any other fields of activity contributing to Afghanistan's economic and social development;
- Food aid required by the Government of Afghanistan when natural disasters happen, particularly droughts.

SPECIFIC OBJECTIVES

TRADE CO-OPERATION

1. Preferential Treatment

(i) All Afghan exports should enter EC territory free of customs duties and any other charges having equivalent effect, on non-reciprocal basis, but subject to specific regulations proceeding from the common agricultural policy;

(ii) The EC should not apply any quantitative restrictions or any other measures having equivalent effect, on imports originating from Afghanistan;

(iii) However, in case of market disturbances or when the external financial stability of a Member State of the EC is disrupted, the EC or the Member State concerned may take the necessary measures of safeguard;

(iv) Afghanistan would continue to levy customs duties and other charges having equivalent effect on imports originating from the EC. It should do so without discriminating between Member States of the EC and should grant them most-favored nation treatment;

(v) Afghanistan and the EC should regularly exchange information related to trade co-operation, particularly on expected developments of trade between them.

2. Export Earnings Stabilization

Afghanistan's exports are mainly agricultural commodities; consequently, the steady, growth of export earnings is extremely important for its rural population. In order to reduce harmful effects of price fluctuations of certain commodity exports to the EC, essential to Afghanistan's hard currency earnings, the EC should establish a fund to stabilize earnings from such exports. In establishing this fund the deterioration of terms of trade between the EC and Afghanistan, the creation of new job opportunities in various sectors of the Afghan economy, especially in rural areas, and Afghanistan's position as a least developed country and its land-locked geographical location, should be taken into account.

The amount of the Export Earnings Stabilization Fund should be decided in the course of negotiations. The list of products included in the scheme should be established by consent of the two Parties. Afghanistan should be entitled to request a financial transfer if its actual earnings from each of the products considered individually proves to be at least 5% below the reference level (for calculation of the reference level the same method can be followed as in the Lomé Convention).

Afghanistan should not be obliged to reconstitute the funds received even if the trend is reversed, i.e. should prices of commodities exported by Afghanistan increase above the reference level; that is, the export earning stabilization amounts received should not be reimbursed but utilized within the framework of financial and technical co-operation by mutual consent of the two Parties.

3. Trade Promotion

In order to enable Afghanistan to derive maximum benefit from trade co-operation with the EC, the two Parties should jointly carry out trade promotion activities, partly financed by the EC, including:

- (i) Basic training or advanced vocational training of staff in trade promotion;
- (ii) Joint undertaking of market research and marketing studies;
- (iii) Participation of Afghanistan at fairs, exhibitions, specialized international shows;

(iv) Collection, publication and distribution of trade information in various forms within the EC and Afghanistan with a view to develop their mutual trade.

INDUSTRIAL CO-OPERATION

Industrial co-operation between Afghanistan and the EC should aim at;

- Development and diversification of the Afghan industry;
- Facilitation of transfer of industrial technology and its adaptation to the specific conditions of Afghanistan;
- Marketing of Afghan industrial products at the EC markets.

In the realization of these objectives, special emphasis should be placed on the development of industrial infrastructure and of small-and medium-sized firms transforming agricultural raw materials; training; research as well as industrial promotion and information. The EC authorities should encourage joint ventures between EC and Afghan enterprises,

FINANCIAL AND TECHNICAL ASSISTANCE

Co-operation in the field of financial and technical assistance should relate to the execution of projects and programs contributing to Afghanistan's economic and social development.

The overall aid of the EC should be fixed for the lifetime of the agreement during the negotiations and should fall under various headings such as:

- Non-reimbursable credits;
- Risk capital (to give initial help in the form of equity participations to joint ventures between EC and Afghan firms);
- Funds destined for the stabilization of export earnings;
- Funds to be used as exceptional aid in case of natural disasters or comparable extraordinary circumstances.

The method of financing should be decided in each case according to the nature of project or program proposed, its prospects of economic and financial profitability, and its economic and social impact.

All credits should be made to the Government of the Republic of Afghanistan which should be free to utilize such credits according to the country's need in the realization of its development programs. Afghanistan should use these funds for financing new projects, either projects launched with the co-operation of EC Member States or those implemented jointly with third countries and international organizations. Afghanistan should have the right to use a portion of the funds put at the Government's disposal by the EC to purchase and import food products.

The Institutional Mechanism

The institutional mechanism of the agreement to be concluded between Afghanistan and the EC should be shaped in the manner of bilateral cooperation agreements between the EC and other developing countries.

Accordingly, a Joint Commission should be established consisting of representatives of Afghanistan, the Member States of the EC and the Commission of the EC.

The Joint Commission should meet as often as necessary, but at least once a year. Extraordinary meetings may be convened at the request of either Party. The Joint Commission may set up sub-commissions or ad hoc working group to assist it in the performance of its tasks.

The Joint Commission should act by mutual agreement between the representatives of the Republic of Afghanistan and the representatives of the EC. It should adopt its own rules of procedure and work program.

The Joint Commission should ensure the proper functioning of the Agreement to be concluded and examine all matters which may arise in the course of its implementation. It should review periodically the results of the arrangements made under the agreement and take such measures as may be necessary for the fulfillment of its objectives. Afghanistan or the EC should be able to raise in the Joint Commission any problems arising from the application of the agreement.

Annex A

**MEMBERS OF THE DELEGATION OF THE COMMISSION OF THE EUROPEAN COMMUNITIES
IN THE NEGOTIATIONS ON COMMERCIAL AND ECONOMIC COOPERATION
BETWEEN THE REPUBLIC OF AFGHANISTAN AND THE EEC**

Mr. Tran, Van-Thinh
Directorate-General for External Relations
Head of Division-General and Multilateral Affairs and
Generalized Tariff Preferences (Leader)

Mr. Hansen, John
Directorate-General for External Relations, Head of Asia Division

Mr. Cendrowicz
Directorate-General for External Relations, Principal Administrator
General and Multilateral Affairs and Generalized Tariff Preference Division

Mr. Thoreau, Jacques
Directorate-General for Development Principal Administrator,
Trade Promotion Division

Mr. Nizery, Francis
Administrator, Administration of the Customs Union

Annex B

**MEMBERS OF THE AFGHAN DELEGATION
IN THE NEGOTIATIONS ON COMMERCIAL AND ECONOMIC COOPERATION
BETWEEN THE REPUBLIC OF AFGHANISTAN AND EEC**

1. Mr. M.F. Rafiq
President of Export Promotion Department, Ministry of Commerce
Head of the Afghan Governmental Delegation
2. Mr. G.S. Bayat
General Director of Marketing, Ministry of Commerce
3. Mr. M.Y. Rafiq,
President of Private Investment, Ministry of Planning
4. Mr. Mohammad Mirza Sammah, Assistant Director of Economic Relations Department
Ministry of Foreign Affairs
5. Mr. Mohammad Ali Sulaiman
Head of the International Institutions Desk
Economic Relations Department, Ministry of Foreign Affairs
6. Mr. V. Segesvary
ITC Project Manager, Ministry of Commerce
Adviser to the Government Delegation

Annex C

**PROPOSALS FOR SUBMISSION TO THE EEC DIRECTORATE–GENERAL
CONCERNING DEVELOPMENT ASSISTANCE IN AFGHAN EXPORT PROMOTION
FOR THE YEAR 1978**

In accordance with the priorities of the Afghan export promotion program the Ministry of Commerce is keen to obtain assistance in the following activities:

1. Trade fairs – Afghan participation in one well established specialized international fair for hides and skins and in another for dried fruits and edible nuts (raisins, apricots, almonds walnut, pistachios, etc.)
2. Organization of trade missions of Afghan exporters to major EEC markets for:
 - Dried fruits
 - Hides and skins
 - Medicinal herbs and spices
 - Oil seeds
3. Preparation of a brochure/catalogue for Afghan hides and skins as well as of a color catalogue for handmade carpets and gelims.

Position Paper of Afghanistan

for the Conference of Ministers of Commerce of the ESCAP region

New Delhi, August 21–24, 1978

It is evident that intra-regional trade expansion and co-operation in this field is of great political importance to Member States of ESCAP just as other efforts have been to strengthen co-operation among developing and developed Asian countries such as the Bangkok Agreement, etc. Afghanistan's presence at the present Conference and its participation in efforts directed towards intensification of regional trade is an affirmation of its solidarity with all Member States and of its firm resolution to co-operate with them in achieving collective self-reliance.

Afghanistan's trade with ESCAP member countries, with the notable exception of its neighbors, India, Pakistan, the USSR and Iran, is at present negligible. It has for a number of years, however, endeavored to develop trade relations with more distant Asian countries as evidenced by the trade agreement concluded with the People's Republic of Bangladesh and the two marketing missions it sent to the Far East and South East Asia last spring.

The Government of the Democratic Republic of Afghanistan considers the study of the complementarities of ESCAP Member States' economies an important prerequisite for the intra-regional trade expansion program. The successful completion of this study aimed at the identification of complementarities in the fields of agricultural and industrial production, including excess capacities, as well as import requirements; increased potential through product adaptation and creation of new capacities in the future, will constitute a landmark on the road towards economic independence and collective self-reliance of the region.

As the major part of Afghan exports consists of commodities, it is quite natural that Afghanistan should consider proposals related to those commodities which do not figure among the 18 items included in UNCTAD's Integrated Program of Commodities, vital to intra-regional trade expansion. It therefore insists that the Economic and Social Commission for Asia and the Pacific initiate and support the establishment of additional commodity associations, communities, and study groups or by whatever name such organizations might be called, similar to the Asian Coconut Community or the Association of Natural Rubber Producing Countries.

Trade-creating joint ventures, an important component of trade promotion in the region, are also crucial from the point of view of Afghanistan's economic development. The Democratic Government, taking into account the unexploited natural wealth of the country, will submit concrete proposals to the Member States of the ESCAP region for joint ventures of benefit to both parties.

Conclusion of long-term contracts for major Afghan export items has been a long established policy of the Ministry of Commerce. This approach, reflecting comparative advantages based on factor endowments in the region, will prove most fruitful for contracting countries once complementarities and potentials are identified.

Commodity arrangements of the type promoting infrastructural development, extensive marketing and improved procedures for consultation and information on market conditions, are precisely the type of suggestions with respect to which immediate action can be taken within the context of the intra-regional trade expansion program.

The Government of the Democratic Republic of Afghanistan attaches great importance to the adoption and implementation of special measures to assist least developed and geographically disadvantaged members of ESCAP in quantitatively and qualitatively improving their commodity export potentials, and feels that concrete proposals should be formulated for immediate action. All too often special measures in favor of the least developed and geographically disadvantaged countries have been adopted through resolutions passed by international organizations but no consideration at all has been given towards their effective implementation. To translate these resolutions into reality requires the political will of all Member States, particularly the developed countries of the region.

With respect to preferential trade arrangements, Afghanistan believes that reduction of import duties, or even their entire elimination, would have little impact on developing intra-regional trade. More important is the removal of non-tariff barriers which really present major obstacles in promoting commerce between countries of the region, and is an obstacle to the increase of the exchange of goods between Afghanistan and its Asian trading partners.

A final chapter in the intra-regional trade expansion program must be the facilitation of transportation between member countries. Problems of transportation are especially embarrassing for landlocked countries, particularly as they are mainly exporters of bulky commodities. However, even those having access to the sea suffer considerably from port congestion, inadequate road and rail infrastructure and equipment, and from the lack of legislative arrangements at regional level. Efforts towards regional trade expansion should, therefore, also concentrate on solution of problems pertinent to the transportation of goods whether by sea, road, rail or air. Priority should be given to the unique problems of land-locked countries.

RECOMMENDATIONS

1. The Conference of Ministers of Commerce of ESCAP Member States requests the Executive Secretary of the Economic and Social Commission for Asia and the Pacific to immediately undertake and carry out the study on identification of complementarities between the economies of ESCAP member countries with a view especially to their import requirements.

2. The Conference of Ministers of Commerce of ESCAP Member States requests the Executive Secretary of the Economic and Social Commission for Asia and the Pacific to immediately initiate the creation of a study group on problems of dried fruit and edible nuts exporting countries of the region, which should eventually lead to the creation of a region wide association of producers/exporters.

3. The Conference of Ministers of Commerce of ESCAP Member States requests participants to grant overall preferential treatment to least developed and, particularly, the geographically disadvantaged countries of the region and to take practical steps for translating into reality various resolutions in this regard,

4. As a first step in the direction indicated above, the Conference of Ministers of Commerce of ESCAP Member States calls on all participants to explore possibilities for the establishment of trade-creating joint ventures and conclusion of long-term contracts with the least developed and geographically disadvantaged countries of the region on a priority basis.

5. For purposes of further developing relevant proposals included in the blue-print, the Conference of Ministers of Commerce of ESCAP Member States requests the Executive Secretary of the Economic and Social Commission for Asia and the Pacific to undertake a study of concrete measures for improved procedures for consultation and information on market conditions by an expert group and submit a report to the commission's 1979 annual session.

6. The Conference of Ministers of Commerce of ESCAP Member States insists that all countries of the region give priority consideration to the removal of non-tariff barriers hindering the expansion of sub-regional and regional trade.

7. Experience has shown that although ESCAP made significant progress in the development of plans for regional transport facilities, one of the principal obstacles towards intra-regional trade expansion has been the inadequacies of existing regional transportation systems. The Conference of Ministers of Commerce of ESCAP Member States considering the preparation of a legislative framework for the improvement of intra-regional transport operations as an important step in this direction, requests the Executive Secretary of the Economic and Social Commission for Asia and the Pacific to convene separate conferences for drafting regional transport treaties on each of the following subjects:

(i) Customs Conditions for the Temporary Importation of Containers and Commercial Road Transport Vehicles;

(ii) Customs Conditions for the Intra-Regional Transport of Goods by Rail;

(iii) Customs Conditions for the Intra-Regional Transport of Goods by Road Under Cover of Customs Carnets;

(iv) Contracts for the Intra-Regional Transport of Goods by Road;

(v) Creation of a Union of Asian Railways, and

(vi) Conditions for the Creation of Joint Venture Maritime Services.

Background Paper

Concerning Two Proposals of the Afghan Delegation

on Trade Policy Matters

32nd Session of ESCAP, 24 March – 2 April 1976

1. *Special measures of industrialized economies of the ESCAP in favor of the least developed, land-locked and island developing countries of the region*

Developed industrialized States, members of the Economic and Social Commission for Asia and the Pacific, – Japan, Australia, New Zealand, etc. – may undertake special measures in favor of the least developed, land-locked and island countries of the area in accordance with the following principles and under two main headings:

A. TRADE PROMOTION MEASURES

The trade promotion measures which may be envisaged should open up their respective markets to major export commodities and goods of the above-mentioned categories of countries with a view to either

- (i) Speed up and intensify the exports of these countries to the developed markets, or
- (ii) Progressively reduce the persistent trade imbalances existing in the bilateral relations between the developed and the least developed, land-locked and island countries of the ESCAP.

In this respect, the industrialized members of the ESCAP could, by unilateral action and not requesting any reciprocity whatsoever, eliminate all tariff and non-tariff barriers related to their imports originating from the above three categories of Asian States. (Of course, a particular scheme of Rules of Origin has to be worked out.) This would imply a total, 100% tariff cut and the removal of all quotas and ceilings concerning exports of the latter, including even exemption of payment of local taxes and any other charges (for example, stamp duties, etc.) and the dispensation from any regulations, official or established by the concerned trade or professional associations, except those on sanitary or hygienic matters or security measures (e.g., rules concerning inflammable products), etc., i.e., regulations pertinent to the public interest.

Such an action on behalf of developed members of the ESCAP would mean granting the least developed, land-locked and island developing countries of the region a highly preferential treatment of their exports, superseding all other preferential measures of a general nature such as the GSP, and any bilateral preferential arrangements granting to a specific trading partner as, for example, the most favored-nation treatment or the likes. This generous, unilateral decision would be only comparable to the treatment granted by the European Economic Community to the 46 signatory ACP (African, Caribbean and Pacific) States of the Lomé Convention.

B. SPECIFIC TECHNICAL ASSISTANCE RELATED TO TRADE PROMOTION

Even in the event of the adoption by developed economies of the ESCAP region of trade promotion measures outlined above, in favor of the least developed, land-locked and island developing countries, another set of technical assistance activities may also be carried out by them in order to facilitate the marketing of main export items of the latter as well as to ensure that they benefit, as much as possible, from sales opportunities existing in various sectors of their respective economies. This means clearly to help the enterprises, public or private, of the least developed, land-locked and island developing countries to adapt their production (quality, assortment, packaging, etc.), their pricing policies and their business practices to the specific requirements of the importers, distributors and customers of the industrialized markets.

To implement these specific technical assistance programs each of the developed countries should set up, for a period of three to five years, a special Fund intended to secure the appropriate financial means for carrying out these activities. A conservative estimate concerning the size of such a Fund, whose operations may cover five years, would be, for each country, in the bracket of US\$ 30 to 50 million.

Two concrete examples can be given in relation to Afghanistan's problems:

(i) It is known that Japanese importers and entrepreneurs are interested in Afghan sheep and goat skins as well as in Afghan sheep and, particularly, goat casings. However, it appears highly desirable that assistance be given to Afghan exporters, in the framework of the technical assistance activities financed by the special Fund mentioned above, with a view to adopt Afghan products to the requirements of the Japanese market. These activities would imply assistance in the creation of an Afghan Skins Improvement Service to upgrade the quality of Afghan skins as well as assistance to the tanning industry, for example through the services of one or several leather chemists, to help Afghan undertakings to produce finished leather acceptable to Japanese customers. As far as sheep and goat casings are concerned, Japanese specialists could contribute to the improvement of the preparation, collection and processing of casings in accordance with the needs of the Japanese importers.

(ii) It is also understood that Australian businessmen and specialized distributors have shown a definite interest in buying Afghan wool or a large assortment of Afghan handicraft products. Consequently, a specific Australian assistance could be geared to the Afghan wool industry, not only in the field of quality improvement, but in the whole organization of this sector of the Afghan economy, with a particular emphasis on cost and pricing policies, in order to enhance exports of Afghan wool on the Australian market. In the handicraft sector Australian assistance could consist of sending specialists, for example design and marketing advisers, to the Afghan Handicraft Centre where they would be helpful in adapting Afghan handicrafts (clothing, embroideries, stone or wood carvings, etc.) to the taste of the Australian customers, respecting, however, the traditional elements and original touch, of the handicraft products of Afghan craftsmen.

It should be emphasized, finally, that in the special technical assistance activities a particular importance should be given to the creation of joint ventures between Japanese and Australian industrialists or distributors, on the one hand, and Afghan enterprises or official bodies, on the other hand. If this approach would be accepted, official assistance activities financed by the special Funds could be limited in many cases to the first years and to the accomplishment of the first steps; the cost of continuous, follow-up operations could then be assumed by the joint venture enterprises and financed out of their budgets. However, official assistance activities would have to be carried out in other cases, such as the Skins Improvement Service, until these organizations would be able to assume the management and full-fledged operations on their own.

In each case of specific technical assistance, a specific agreement should be signed by the two participating States or by the two or more participating organizations or official bodies.

C. CREATION OF AN EXPORT-EARNINGS STABILIZATION FUND IN FAVOR OF THE LEAST DEVELOPED, LAND-LOCKED AND ISLAND DEVELOPING COUNTRIES OF THE ESCAP REGION

The creation and the functioning of the Fund could be modeled after the 'Stabilization of Export Earnings System' (STABEX) of the Lomé Convention.

The objective of the Fund would be to avoid the harmful effects of the instability of export earnings and to achieve the regularity and projected increase of financial resources in foreign exchange required by the sustained growth of the least developed, land-locked and island developing countries' economies.

The Fund set up in the framework of the ESCAP Secretariat would be created by a specific agreement between the donor States and the countries which will be entitled to benefit from it. It is suggested that the donor States should include the developed, industrialized members of ESCAP and those developing countries in the region (i) who possess natural resources such as oil, rubber, etc, which secure them considerable foreign exchange earnings, or (ii) whose economies reached, for various reasons, a relatively high level of development like Singapore.

After a detailed preliminary study undertaken by the Trade Promotion Centre of the ESCAP Secretariat, the agreement would include a comprehensive list of all export commodities which would fall under the scheme and exports of which would be taken into consideration in the operations of the Export Earnings Stabilization Fund. On the basis of this preliminary study which has to analyze the actual total volume of exports of these commodities and make reliable forecasts concerning their future evolution, – exports originating in the least developed, land-locked and island developing countries of the region to all markets in the world – the export earnings stabilization needs of the latter countries might be estimated with some probability (as commodity price fluctuations and changing conditions at the world markets cannot be predicted with any certainty in our times). According to these findings, the size of the Fund may be decided taking into account to the period for which the agreement was concluded.

Any least developed, land-locked or island developing country of the ESCAP region would be entitled, on the basis of specific 'transfer agreements' concluded case by case with the Fund, to a financial transfer if, on the basis of the calendar year, its actual earnings from each of the products considered individually would be at least 3% below the reference level.

The reference level would correspond to the concerned product's export earnings, i.e. the total value of the export item concerned, during the three years preceding the year of application. This reference level has to be calculated for each beneficiary State and for each product. The difference between the reference level and actual earnings would constitute the basis of the transfer.

However, it appears necessary to set as a condition for the request of a financial transfer from the Fund that the commodity(ies) or product(s) referred to should represent at least 10% of total earnings of merchandise exports to all destinations of the applying country during the year preceding its request.

It is quite natural that any request could be refused, after due examination, if the fall in earnings of the exports of a particular commodity would be a result of trade policy or any other measures taken by the requesting Government and affecting adversely its exports.

The amounts transferred would not bear interest. The least developed, land-locked or island developing States which received transfers would engage themselves to reconstitute the resources made available to them when it is found that the trend of their export earnings had changed and would so permit. To this effect, the Fund's administration (or the ESCAP Secretariat) would determine, for each year and for each product, whether (i) the unit value of the exports is higher than the reference unit value, and (ii) the quantity actually exported is at least equal to the reference quantity.

If the above conditions are met at the same time, the recipient State would have to pay back to the Fund, within the limits of the transfers received, an amount equal to the reference quantity multiplied by the difference between the reference unit value and the actual unit value.

If the resources have not been fully reconstituted at the expiration of the period for which the agreement was concluded, it can be decided that the debtor State (i) has to pay back the sums outstanding, wholly or partially, in one or more installments; or (ii) is dispensed of such repayment. Such a decision would be based on the debtor State's balance-of-payments situation and prospect, its foreign exchange reserves and its foreign indebtedness.

To give once again a practical example, it could be foreseen that prices of commodity X (for example, dried raisins) exported by Afghanistan which represented more than 10% of its merchandise exports during the year preceding its request, would fall and reduce its earnings from these exports by at least 5% in comparison to its earnings from exports of this commodity in the course of the preceding three years, it would be entitled to request the Fund for compensation. When the trend would change, meaning that the world prices of the commodity in question would soar, and on the basis of the indicated methods of calculation, it would have to reimburse the Fund, in the limit of the transfer received, of its increased export earnings.

Background Paper

on ESCAP Regional Transport and Transit Conventions (1976)

The development of trade between countries who are members of ESCAP is now, and for some time has been, a matter of considerable interest and concern as evidenced by the frequent reference to it in these and in past meetings. The development of regional trade undoubtedly is a commendable goal, and certainly is one we all endorse. But when one moves down to the practical details of how to get such trade moving, how to foster it and encourage its growth, it quickly becomes apparent there are many difficulties and obstacles which must somehow be removed or overcome before significant progress will be possible. One such obstacle, and in my opinion a very important one, is the lack of suitable regional agreements and institutions for the proper transportation of goods across national frontiers.

As one studies this matter, there appear to be two principal elements of significance: The first is that many of members of ESCAP, most particularly the coastal states, are unaware of the importance of suitable regional transport, customs and transit agreements because they concentrate on their own selfish interests. The second is that the international systems presently available, and which are most often recommended, are not well suited to Asian conditions.

Let me explain.

The transport and the institutional mechanisms whereby the movement of goods across national frontiers are handled and controlled are critical elements in the conduct of international trade. If there are no suitable means of moving goods from a producer to a buyer at a cost acceptable to both, there can be no commerce, no trade. When this commerce must pass through (i.e., transit) the territory of a third country while moving from its point of origin to its destination, any difficulties or problems involved are greatly magnified.

In recent years land-locked countries have frequently talked about their particular problems of transit. Coming from a land-locked country, I can say that these are quite real problems and their solution is of great importance to us. Further, the subject has been studied in great depth by UNCTAD. (For a short, simple discussion of the problems of transit see the UNCTAD report 'A Comprehensive Study on the Transit Problems of the Land-locked Developing Countries,' A/10203, issued on 27 August 1975). These discussions, centered as they are on the particular problems of the inland States, have tended to obscure the vital importance of transit facilities and services to the coastal countries for the conduct of their own trade. For example, the land routes between India and Iran pass through Pakistan. Other examples could be cited. While these countries may have transit-free sea routes, in many cases land routes offer better service and lower total costs. This may be just the factor necessary to get regional trade flowing.

While trade between neighboring States is exclusively a matter for bilateral negotiation, the mechanics of border crossing and related documentation and procedures are strongly influenced by commonly accepted international practice. Thus, once good regional practices and institutions are established and available, individual countries will rapidly find many areas not originally foreseen where they can be applied effectively and beneficially.

The significant point I am endeavoring to make is that every member of ESCAP has some interest, some involvement, and something to gain from creating a set of regional conventions dealing with the problems of international transport, transit, customs, and procedures and documentation.

At present, most international road transport and transit operations are governed by a series of international convention. Five of the better-known and more commonly used conventions are:

- Customs Convention on the International Transport of Goods Under Cover of TIR Carnet (Geneva, 1975)
- International Convention Concerning the Carriage of Goods by Rail (Berne, 1961)
- Convention on the Contract for the International Carriage of Goods by Road (Geneva, 1956)
- Customs Convention on the Temporary Importation of Commercial Road Vehicles (Geneva, 1956)
- Custom Convention on Containers (Geneva 1956, revised in 1972)

There are others directed towards specific kinds of operations and types of situations.

What is important is that all of these conventions were developed in Europe for use among Western European countries and are, therefore, built around European institutions and practices. But today the use of these conventions has extended far beyond the limited territory they were originally designed to serve. As their use spreads further afield, the European institutions which are an inseparable part of their operation become less and less relevant. (For example, would it be appropriate for a dispute between two Asian countries over a contract for the international carriage of goods to be settled by a European court?)

We in Afghanistan and our neighbors in Iran are very conscious of being at a point of separation between Europe and Asia. Because of this, we are especially sensitive to the fact that European-based conventions may be useful for operations to and from Europe, but they are not well adapted to local conditions within Asia. It is for this reason that we have suggested that ESCAP should undertake the development of a set of its own regional conventions addressed to the international transport, customs and transit requirements of Asia in support of regional trade.

As we in Afghanistan see the present situation, this is a proper time for Asia to start building its own institutions attuned to its own needs; the continued expansion of the Asian Highway network, and the growing plans for a Trans-Asian Railway will make the need for improved and more effective international facilities within the region more pressing and more important. Further, as we see it, the International Trade Division of ESCAP presently has on hand, or has it available through UNCTAD, most of the resources and the professionally qualified experts necessary to begin this task. If we do not start now, it may be some time before we are again in such a fortunate position.

Marketing Mission Report to the Nordic Countries
for Export Products of Afghanistan

by

Victor SEGESVARY

ITC Project Manager

May 1978

The Afghan Ministry of Commerce and the ITC Export Promotion Project Marketing Mission to Scandinavia, composed of Messrs. Farid Rafiq, President of the Export Promotion Department of the Ministry and Victor Segesvary, ITC Project Manager, took place from 31 March through 6 May 1978. In Denmark and Sweden the mission joined forces with a Marketing Mission from the Department of Cooperative Development, Ministry of Agriculture, and the Project on Agricultural Cooperatives and Credit in the Democratic Republic of Afghanistan (PACCA) composed of Messrs. H. Nasser, Director General of DCD and L. Gronquist, Project Adviser.

SUMMARY

The Marketing Mission to Scandinavia was successful returning with firm orders for various Afghan export products the value of which amounted to approximately US\$300,000. In addition, some 35 sample orders for raisins, dried apricots, apricot kernels, almonds, walnuts, medicinal herbs and spices, sheep skins, and handicrafts were also obtained. If all of the importers' requirements will be fully respected such sample orders might eventually generate business for several millions of dollars in the coming years. About 75% of the Nordic retail foodstuff market was covered and about 80 to 90% of dried fruit and edible nuts distributors were contacted.

As a follow up, it is now possible to formulate a marketing strategy targeting the Northern European markets for Afghan raisins, one of the country's most important export items, and to propose concrete measures for the attainment of specific marketing objectives. If proper actions are carried out to solve some problems, it is estimated that Afghanistan's share in Nordic raisin imports can be increased to about 20-25% of total imports in the coming years. Considerable market information was collected and with respect to products mentioned above and others, such as animal casings, discussions were held with potential buyers on areas of cooperation, including technical assistance.

RECOMMENDATIONS

1. The single most important problem with respect to agricultural and a livestock export is an improvement of product quality and establishment an efficient quality control through sectoral organizations. Once again, it was recognized that the inherent, natural quality of Afghan agricultural and livestock products is excellent; however, a serious deterioration of the products' state occurs in the course of collection, pre- processing preparation (cleaning, etc.), processing and transportation to target markets. It is, therefore, imperative to remedy these shortcomings immediately through proper governmental action implemented through sectoral organizations and co-operation with individual firms.

2. Increasing Afghan a raisin export necessitates introducing correct retail packaging with the assistance of Scandinavian and Finnish importers.

3. Edible nuts must be properly sieved in order to calibrate them in accordance with international standards and to eliminate hard shells and broken pieces. This is a *sine qua non* condition for expanding sales to Northern Europe. Exporters should therefore be obliged to procure the needed equipment.

4. For medicinal herbs and spices a complete survey must be carried out, as already foreseen, by the Faculty of Pharmacy in the shortest time possible and major specialized trading companies. This survey should include technical specifications and evaluate the availability of commercially significant volumes. The most important single factor for successful marketing of these products in Nordic countries is price competitiveness.

5. Quality requirements, size, correct selection and calibration and hygienic condition in processing plants are the major problems encountered concerning exports of products of animal origin, especially skins and animal casings. Here again, the needed equipment must be purchased by producers.

6. Among handicrafts items the most successful appear to be *charpoi* furniture (wickerwork in wooden frame) and leather goods. In case of ladies' garments, the only way to obtain larger orders seems to be the conclusion of co-operation agreements with large importers and execution of orders according to their specifications.

It would also be most beneficial to appoint a company in each Nordic country as representative to handle, perhaps in exclusivity, the whole range of Afghan handicraft products in view of their varied nature, to avoid the difficulty in finding the best importer or distributor for each item. Promoting handicrafts through missions and correspondence would be an impossible task.

7. No particular transport problems were identified during the mission. As in the past, the best way to ship the bulk of Afghan exports to Nordic markets is by rail via the Soviet Union. Shipments can be directed either through the Baltic ports, – Leningrad, Riga or Stettin, – where they can be loaded on

ships, or through the Finnish– Soviet border, from Vainnikala to Helsinki and to other Nordic countries. The freight cost at present is around US\$120 to 150 per ton; the major constraint is that the Soviet railways do not accept partial shipments, but full containers only in view of the scarce manpower. Therefore, the consolidation of shipments to Nordic countries has to be foreseen in Afghanistan, and arranged through AFSOTE, the Afghan/Soviet joint stock transport company. It has to be noted that shipments through Baltic ports are becoming more costly as Soviet ship crews do not participate in off loading at ports of destination, and, consequently, heavy extra costs (US\$30–60 per ton) must be incurred.

Road transportation is only possible for high value goods like carpets, and air transport, with the exception of small shipments of handicraft items, cannot be taken into consideration at present.

CHAPTER ONE

Market Prospects for Afghan Raisins

A. THE PRESENT SHARE OF AFGHAN RAISINS OF NORDIC MARKETS

1. Raisin imports from Afghanistan to Nordic countries are limited to those in bulk products, whereas the largest share of imports, between 85% and 90%, consist of retail packaged (mostly 250 gr) raisins, predominantly from California. Recently Turkey started to export raisins in retail packaging and has sold small quantities in Scandinavia. This is the most serious handicap to the expansion of Afghan raisin exports to these markets.

2. Afghan raisin exports to the Nordic countries were made, almost exclusively, by the Kabul based firm, Pashtoon Industries.

All importers recognized that quality had greatly improved during the last years, and is now considered acceptable. It is essential, however, particularly in view of retail packaging, that all exported raisins should be of first quality. Quality control undertaken by the Afghan Raisin Institute must, therefore, be severe in the coming years. If the retail packaged raisins are of lower quality the export drive to the Nordic markets could be a failure.

3. It is understood that all exported raisins must be coated with oils of vegetable origin, and formerly used other oils, such as paraffin, must be abandoned.

4. The dynamism of Afghan raisin exports to the Nordic markets was most spectacular in Finland and Sweden during the last 3 years. In Finland they trebled reaching almost 100 tons in 1976, and Afghanistan became the second major supplier this year with around 13% of total Finnish raisin imports behind the USA (70%). In Sweden, Afghanistan's raisin exports amounted to 153 tons in 1976 (387'000 Swedish kronors), but between January–November 1977 they reached 473 tons (2.1 million Swedish kronors), representing 13% of total raisin imports (3'850 tons) against a market share of 0.3% in 1975); in other words Afghanistan's market share considerably improved, although total Swedish raisin I imports somewhat leveled off.

B. FUTURE PROSPECTS

Total raisin imports by the four Nordic markets can reliably be estimated at 8'000 to 10'000 tons annually. Afghanistan's present share of this total is not more than 8%.

It can be foreseen, however, that first, if quality is maintained at the present level or, even better, will be improved and certified by the Raisin Institute, and, second, if a growing portion of Afghan raisins is exported in 250 grams retail packages and not in bulk (cartons of 12.5 kg), Afghanistan's share of Nordic raisin imports could be increased to about 20% to 25% of the total, or 2'000 to 2'500 tons a year.

C. ACTIONS TO BE TAKEN

1. The number of suppliers to the Nordic markets should, for the moment, be limited. However, in addition to the Pashtoon Industries, which have already established contacts, the Samoon Raisin Processing Factory and the Afghan Co-operatives could also be added.

In building up a comprehensive strategy for increasing sales of Afghan raisins at these markets, the co-operatives assisted by the PACCA project will have to be relied upon in the first place as they have taken the necessary measures to improve quality and implement quality control. Through a central exporting unit they are able to ensure that all requirements of importers are met. They should therefore be given more flexible treatment in securing early contracts and prompt payment as well as pre-shipment credits.

2. The export drive to Nordic markets should be supervised by the Export Promotion Department of the Ministry of Commerce and implemented by the Afghan Raisin Institute in order to ensure essential co-ordination and, in particular:

- (i) To guarantee the quality required;
- (ii) To work out satisfactory arrangements for exports increasingly in retail packaging; and
- (iii) To establish necessary brand policies.

3. As a large part of raisin imports in Nordic countries are in retail packages of 250 gr cardboard cartons, a solution must be found to export Afghan raisins in similar packages. Nordic importers' preference for consumer packaged products is attributed to the fact that retailers find such cartons easier to display and the public is accustomed to them. The dominating brand, *SunMaid* of California, has for years been sold in such packaging.

As it is not possible at present to produce such cardboard boxes in Afghanistan because there are no facilities for color printing, discussion were held on this matter in the various countries visited. The following three enterprises have agreed to submit proposals, with price quotations, to the Export Promotion Department for the production of retail packages:

BANG & CO.

Mr. Allis Tinnila, Managing Director
Mannerheimintie 14A
SF-00101 Helsinki 10, Finland
Telex: 12625, cable: BANGCO

NORDISK ANDELSFORBUND

Mr. Bengt Jacobsen
3 Axeltorv
DK-1609 Copenhagen, Denmark
Telex: 27111, cable: Norforbund

HALLEN & RYDBERG AB

Mr. Thore G.E. Hallen
Burggrevegatan 23
S-411 03 Gotheburg, Sweden
Telex: 20931, cable: Hafood

Mr. T.G.E. Hallen of Hallen & Rydberg AB requested the Ministry of Commerce to supply him with photographic material, approved by the Afghan authorities, which could be used in preparing a design for the carton boxes. This material should reach Sweden around June 15th 1978.

The costs incurred when developing a retail pack for Afghan raisins and creating a general brand for it to be marketed in Sweden, will be covered by the Swedish Office to Promote Imports from Developing Countries (IMPOD).

The selected design and package will then be produced in a limited quantity (e.g., 500,000 pieces) to be filled and glued by hand in Afghanistan and to be used for exports to Nordic markets. After such a test operation planning of larger scale production can be carried out.

4. Some preliminary calculations were made by Nordisk Andelsforbund of Copenhagen as to the probable cost of producing (printing included) retail packages for Afghan raisins in Scandinavia. Such calculations took into consideration their competitiveness with Californian and Turkish raisins. At present, Nordisk Andelsforbund imports raisins in 250 gr. packages from California at the price of US\$13.32 per carton of 36 boxes of 250 gr., thus the price per ton of raisins amounts to US\$1'478.

Raisins (type No.1, medium) from Turkey, in 250 gr. packages, – 40 boxes of 250 grs. in one carton, – fetch US\$1'235 per ton FOB Izmir (US\$1'185 per ton FOB for 500 gr. boxes) according to a quick estimate made by Mr. B. Jakobsen of the .Andelsforbund, the price of a printed box in Denmark should be around 5 US cents, i.e. around US\$200 per ton.*

* Note: Information received from Nordisk Andelsforbund indicated that eventually the price of retail packages may be no more than around 3 US cents.

The average price of Afghan raisins recently exported to Europe was US\$1'000 C&F European port. It can be safely assumed that even in case of an additional cost of US\$200 per ton and some limited expenditure for wages when filling and gluing the boxes by hand, retail packaged Afghan raisins would have a high competitive advantage over Californian and even Turkish raisins.

5. When all problems of retail packaging are settled, proper distribution and brand policies decided upon, Afghan raisin exports to Nordic markets will have to be channeled through a few, carefully selected distributors, although some of them, such as Hallen of Sweden, would prefer exclusive rights. In accordance with the distributors' strategies a brand policy has to be worked out with them. Some like the Andelsforbund or UNIL might use their own brand names (for UNIL, for example, it is "Eldorado," for Andelsforbund "Rainbow"), for others a new Afghan brand name could be created, the use of which will be controlled by the Export Promotion Department and the Raisin Institute.

ORDERS OBTAINED

1. Order in bulk for red sultana raisins, 40 to 60 tons, at the price of around US\$1'000 per ton C&F Copenhagen for delivery latest in August 1978. A sample of at least 500 grs should be sent with quotation to:

UNITED NORDIC INC. AB
Attn. Mr. Bent Kjeldahl, Assistant Manager
28, Mileparken
DK-2730 Herlev, Denmark
Telex: 35146

2. Order in bulk for red sultana raisins of 120 tons (4 containers) at the price of around US\$1'000 per ton C&F Stockholm for delivery in August 1978:

HALLEN & RYDBERG AB
Attn. Mr. Thore G.E. Hallen, Managing Director
Burggrevegatan 23
S-411 03 Gothenburg, Sweden
Telex: 20931

These two orders will be handled by the Department of Co-operatives, Ministry of Agriculture, assisted by the PACCA project.

SAMPLES TO BE SENT TO

1. Five kg of red sultana raisins with C&F Helsinki price quotation:

KESKUSOSUUSLIKE (OTK)

Attn. Mr. Erkki Karppinen, Section Leader

P.O. Box 120,

Haameentie 19,

SF-00101 Helsinki, Finland

Telex: 12-454

If the sample is satisfactory, OTK will place an order for 20 tons to be delivered in August–September 1978. In this case, final offer to be sent with copy to Mr. Karppinen, OTK:

NORDISK ANDELSFORBUND

Attn. Mr. Bent Jakobsen

3, Axeltorv

DK-1609 Copenhagen, Denmark

2. Three cartons (37.5 kg) of red raisins with C&F Copenhagen price quotation:

P. BORSTE A/S

Attn. Mr. Aage Winther

10 Overgaden oven Vandet

DK-1415 Copenhagen K, Denmark

Telex: 31380 or 31382

3. Raisin potential study to be sent to

— BANG & CO., Helsinki

— SOK, Helsinki

— OTK, Helsinki

— P. BROSTE AB, Sweden

NOTE: For quotations and samples of various types of raisins of the 1978/79 (1357) seasonal crop, obtained by the mission of the Co-operative Department/PACCA mission, see Part II of the mission's report.

CHAPTER TWO

Market Prospects for Dried Apricots

Considerable interest was shown by companies in Nordic countries for dried apricots of Afghanistan, sour as well as sweet.

The only technical specification received concerns the legally admitted SO₂ content as follows:

Denmark	1 g	per kg
Sweden	1 g	per kg
Norway	1.5 g	per kg
Finland	2 gs	per kg

Some companies like UNIL (Denmark) do not wish to import products treated with SO₂ for conservation purposes, dried apricots included, as they consider that such low limits will not be respected by exporters. Other techniques should therefore be tested.

SAMPLES TO BE SENT TO

1. Five kg each of sweet and sour apricots, of yellow and reddish color, with C&F Helsinki price quotation (via Vainnikala on the USSR – Finnish border):

BANG & CO.

Attn. Mr. Aulis Tinnila, Managing Director

Mannerheimintie 14A

SF-00101 Helsinki 10, Finland

Telex: 12625

2. Two kg each of sweet and sour apricots, of yellow and reddish color, with C&F Helsinki price quotation:

TUKKUKAUPPOJEN OY (TUKO)
Vantaa 63
SF-01630 Helsinki, Finland
Telex: 12611 TUKO SF

3. Two kg each of sweet and sour apricots, of yellow and reddish color, with C&F Helsinki price quotation, and 1 kg of each type of deepened whole apricots, with same price quotation.

SUOMEN OSUUSKAUPPOJEN KESKUSKUNTA (SOK)
Vilhonkatu 7, P.O. Box 460
SF-00101 Helsinki, Finland
Telex: 12-456

4. Two kg of sour apricots, of reddish color, with C&F Helsinki price quotation:

KESKO OY
Satamakatu 3
SF-00160 Helsinki, Finland
Telex: 12-478

5. Two kg each of sweet and sour apricots, of yellow and reddish color, with C&F Copenhagen price quotation:

P. BROSTE A/S
Attn. Mr. Aage Winther
Overgaden over Vandet 10
DK-1415 Copenhagen, Denmark
Telex: 31380 or 31382

6. Five kg each of sweet and sour apricots, of yellow and reddish color, with C&F Copenhagen price quotation:

NORDIS ANDELSFOEBUND
Attn. Mr. Bent Jakobsen
Axeltorv 3
DK-16090 Copenhagen V, Denmark
Telex: 27111

7. Two kg each of sweet and sour apricots, of yellow and reddish color, with C&F Stockholm or Lund price quotation:

KOOPERATIVA FORBUNDET
Attn. Mr. Charles Eckstrom
Dept. 410-050
S-245 00 Staffanstorps, Sweden
Telex: 32737 Foodia S

8. Two kg each of sweet and sour apricots, of yellow and reddish color, with C&F Stockholm price quotation:

ICA A/B
Odengatan 69, P.O. Box 6187
S-102 33 Stockholm, Sweden
Telex: 19-435 ICA S

9. Two kg each of sweet and sour apricots, of yellow and reddish color, with C&F Stockholm price quotation:

S.J. NORMAN A/B
Styrmansgatan 5
S-114 54 Stockholm, Sweden
Telex: 19194

10. Two kg each of sweet and sour apricots, of yellow and reddish color, well cleaned, with C&F Stockholm price quotation:

BOB INDUSTRIER A/B
P.O. Box 18
S-692 01 Kumla, Sweden
Telex: 73381

CHAPTER THREE

Market Prospects for Apricot Kernels

Most of the firms visited showed interest in sweet apricot kernels, though some were also willing to take bitter ones. As a general rule, no more than 3% bitter content was acceptable for sweet apricot kernels. Sweet kernels fetch somewhat higher prices because bitter kernels have to be washed to obtain a neutral taste. If sweet kernels have a bitter content higher than 3%, they must be washed and this constitutes an additional cost to importers.

The most important requirement stipulated by all firms was that consignments should not contain hard shell or broken pieces. It is consequently inevitable in order to develop exports to European markets that exporters acquire sieving equipment that would correct calibration and eliminate all hard shell and broken content.

The main suppliers in Nordic markets are Iran and Pakistan, though in the case of Pakistan some importers are considering decreasing their purchases as Pakistani kernels appear to be malodorous.

According to Swedish importing companies what is exported from Afghanistan and neighboring countries under the trade name '*wild bitter mountain almonds*' are, in fact, bitter apricot kernels.

Afghan exporters' prices for sweet as well as bitter apricot kernels (under the denomination mentioned above) were generally considered acceptable and competitive. As an indication, one firm quoted the price of bitter kernels bought from the People's Republic of China as DM 58 per kg shipped net, which at the current exchange rate gives US\$ 2.267 per ton.

ORDERS OBTAINED

1. One container (20 t) of sweet apricot kernels, absolutely no hard shell or broken pieces, not more than 3% bitter content, no double bag, C&F Malmö or Stockholm, price per net weight, payment cash against documents (no L/C requirement accepted):

AB R. LUNDBERG
Attn. Mr. Hasse Liligren
P.O. Box 104
S-201 21 Malmö, Sweden
Telex: 32590

2. Thirty tons of sweet apricot kernels, free of hard shell and broken pieces, as per sample, at a price of US\$2'100 C&F Stockholm, delivery from Kabul in June 1978:

This order was telexed from Stockholm to Haq Murad Co. from:

AB HALLEN & RYDBERG
Attn. Mr. Thore G.E. Hallen
Burggrevegatan 23,
S-411 03 Gothenburg, Sweden
Telex: 20971

Later some complications occurred in respect of the buyer's quality requirements (see separate correspondence).

SAMPLES TO BE SENT TO:

1. One kg sweet apricot kernels, only 3% bitter content, free of hard shell and broken pieces:

HANS BODEN AB
Attn. Mr. Ake Lindeberg, Director
Sjöviksbacken 10
S-117 43 Stockholm, Sweden
Telex: 17704 Hansbo S

2. One kg wild bitter almond kernels (apricot kernels), free of hard shell and broken pieces.

AB R. LUNDBERG
P.O. Box 104,
S-201 21 Malmö, Sweden
Telex: 32590

3. One kg each sweet and bitter apricot kernel, former with not more than 3% bitter content, both free of hard shell and broken pieces:

AB RISENTA
Norrmalmstorg 1
S-111 46 Stockholm, Sweden
Telex: 10411

4. One kg each sweet and bitter apricot kernel, former with not more than 3% bitter content, both free of hard shell and broken pieces:

UNITED NORDIC INC. AB
Attn. Mr. Bent Kjeldahl, Ass. Manager
Mileparken 28
DK-2730 Herlev, Denmark
Telex: 35146

5. One kg each sweet and bitter apricot kernel, former with not more than 3% bitter content, both free of hard shell and broken pieces:

DANISH FANCY FOOD
Odensee, Denmark

CHAPTER FOUR

Market Prospects for Almonds

Prospects for exporting Afghan sweet almonds to the Nordic markets are not very bright as importers require that almond kernels must be sieved by appropriate equipment, i.e., properly calibrated, with hard shell and broken pieces eliminated, before they are dispatched in bulk to be re-packed at the final destination point. Californian, Spanish and Portuguese almonds, for example, imported to Finland are packed in 50 or 100 lb cartons.

Another obstacle is that prices quoted for sweet Afghan almonds were considered high in comparison to Californian, Spanish and Portuguese almonds. One Swedish importer indicated that unselected Valencia-type sweet almonds are 5% cheaper; the price of US\$ 2'950 C&F Stockholm was mentioned for 1978 crop purchases.

In addition, high customs duties on almonds in Denmark (e.g., 6 Danish kroner per kg.) did not improve the prospects for almonds from Afghanistan.

SAMPLES TO BE SENT TO

1. One kg sweet almonds as uniform-sized as possible, free of shell and broken pieces:

KESKUSOSUUSLIKE (OTK)

Attn. Mr. Erkki Karppinen, Section Leader

P.O. Box 120

Haameentie 19

SF-00101 Helsinki, Finland

Telex: 12-454

2. Two kg sweet almonds, as uniform-sized as possible, free of shell and broken pieces:

BANG & CO.

Attn. Mr. Aulis Tinnila, Managing Director

Mannerheimintie 14A

SF-00101 Helsinki 10, Finland

Telex: 12625, cable: BANGCO

CHAPTER FIVE

Market Prospects for Walnuts

Imports of walnuts are very limited in Nordic markets; only walnuts in shell in cello-packs of 250–500 gr are imported by some firms during Christmas time. As in the case of almonds, importers' main requirement is correct calibration. In addition, they do not accept considerable variations in size:

SAMPLES TO BE SENT TO

1. Two kg walnuts in shell, correctly calibrated:

KOOPERATIVA FORBUNDET

Attn. Mr. Charles Eckerström

Dept. 010–050

S–245 00 Staffanstorp, Sweden

Telex: 32737 Foodia S

2. Two kg walnuts in shell and two kg walnuts without shell (halves but not pieces), both correctly calibrated:

P. BORSTE A/S

Attn. Mr. Peter Borste, Director

10 Overgaden oven Vandet

DK–1415 Copenhagen K, Denmark

Telex: 31380 or 31382

3. Two kg walnuts in halves light and even in color, with C&F Stockholm price quotation:

ICA A/B

Odengatan 69

P.O. Box 6187

S–102 33 Stockholm, Sweden

Telex: 19435 ICA

NOTE CONCERNING PISTACHIOS

This product is very little known in the Nordic countries, and no interest was shown in it by any importer.

CHAPTER SIX

Market Prospects for Medicinal Herbs and Spices

Some Nordic importers might be interested in Afghan medicinal herbs and spices, but no proper negotiation could take place as the mission did not have the necessary technical and marketing information at its disposal. The Faculty of Pharmaceutics, Kabul University, had promised to forward information on at least of a hundred herbs and spices before the mission's departure, but they failed to do so.

Berner & Co. in Helsinki showed little interest as they import small quantities only (Belladonna leaves, pyrethrum flowers and digitalis roots) via Hamburg. Bang & Co, also of Helsinki, which imports liquorice root and extract, datura saltramonia and sampolamin, could, if provided more detailed information develop business with Afghanistan.

P. Broste A/S of Copenhagen, imports a series of spices (see attached list). Their major supplier at present is OLIMPEX of Poland as well as some Western European countries like Holland. It was emphasized that price was the most important factor with respect to imports of such products as the market is highly competitive. Broste is only interested in liquorice extract, not roots.

In Sweden, AB R. Lundberg in Malmö showed interest in alfalfa and clover seed as well as liquorice extract. A major potential client for poppy, caraway, fennel and anis seed could be Hans Boden A/B of Stockholm. The latter requires 99% clean poppy seed with no sand content and machine-cleaned if possible (if hand cleaned, then the firm has to re-clean the consignment). Its yearly requirement for industrial use is around 200 tons of poppy seed. Until now Pakistan and Iran have been the major suppliers and the quality supplied has been found satisfactory. The price of Iranian poppy seed, for example, is US\$ 430 C&F Stockholm in the present season. Hans Boden recently imported caraway, fennel and anis seed, 10 ton lots of each, for US\$ 400 and US\$ 690, C&F Stockholm, respectively. Its bank is GOTABANKEN, Stockholm and it pays cash against delivery.

SAMPLES TO BE SENT TO

1. Five kg liquorice root with price quotation:

BANG % CO.

Attn. Mr. Aulis Tinnila

Mannerheimintia 14A

SF-00101 Helsinki 10, Finland

Telex: 12625, cable: BANGCO

2. All spices listed below, if available, with price quotations, as well as technical and price information of all other herbs and spices exportable from Afghanistan.

P. BROSTE A/S

Attn. Mr. H. Pelle-Hansen

Overgaden over Vandet 10

1415 Kobenhaven K, Denmark

Telex: 31330 or 31382 or 31260

3. Alfalfa and clover seed with price quotation:

A/B R. LUNDBERG

Attn. Mr. Hasse Liljegren

P.O. Box 104

S-201 21 Malmö, Sweden

4. Poppy, caraway, fennel and anis seed, with price quotation:

HANS BODEN A/B

Attn. Mr. Ake Lindberg

Sjöviksbacken 10

S-117 43 Stockholm, Sweden

Telex: 177004 Hansbo S

NOTE:

Broste's medicinal and culinary herb imports

<u>Latin name</u>	<u>English name</u>
Rhizoma Curcuma	Turmeric root
Semen foeni graeci	Fenugreek seeds
Semen papverus alb.	Poppy seeds, white
Fructus coriandri	Coriander seeds
Fructus Carvi	Caraway seeds, black
Fructus Cumini	Cumin seeds
Rhizoma Valerianae	Valerian root
Fructus Juniperi	Juniper berries
Folia Menyanthis	Buckbean leaf

CHAPTER SEVEN

Market Prospects for Hides and Skins

Several firms engaged in raw skins and finished leather trade was contacted in Nordic countries, including companies affiliated to large international corporations like Hollander. It became evident that sales possibilities for Afghan pickled and wet blue sheep and goat skins are very limited because:

First, manufacturing of leather products is not a large industry in Scandinavia and is essentially limited to the apparel and furniture sectors. There is no shoe industry, for example, as all footwear is imported from continental Europe;

Second, tanneries have long-established suppliers and are reluctant to shift from established to hitherto unknown suppliers such as Afghanistan.

In all countries visited tanneries which could be considered potential buyers of Afghan skins are located within long distances of the capital and thus could not be visited by the mission. Nevertheless, some sample orders were obtained and a list of major tanneries received to which offers can be made by Afghan exporters.

Though interest was shown with respect to Karakul skins, the mission refrained to enter into any marketing negotiation as all such skins are auctioned in London or Leningrad and are not allowed to be exported directly.

One Finish firm expressed interest in importing Baghana skins as well as cheap lamb skins, and requested samples.

SAMPLES TO BE SENT TO

1. Raw, pickled and wet blue sheep and goat skin samples, with price quotations franco Vainikkala (USSR–Finland border station) to be sent to:

BERNER CO.

Attn. Mr. Jukka Klemola

Etelaranta 4B

Helsinki 13, Finland

Telex: 12447

2. Pickled and wet blue sheepskins, 100 dzs.

AB BALTISKA, Skinnkompanet
Attn. Mr. B. Israelson
Birger Jarlgatan 6B
P.O. Box 7063
Stockholm, Sweden
Telex: 1590

3. Samples of Baghana skins and cheap lamb skins, with price quotation Franco Vainikkala or C&F Helsinki to be sent to:

TURKISKAUPPIAITTEN OY
Attn. Antti Ajanko, Sales Manager
Keskuskatu 3
00100 Helsinki 10, Finland
Telex: 12-454

Danish Tanneries/Skins Importers
Faaborg Garvers
DK-5600 Faaborg

H.P. Lovengreens Garverier
DK-4760 Vordingborg

Flach & Knudsens Garverier
DK-8400 Ebeltøft

Swedish Tanneries/Skin Importers
*Eliassons Laderindustri AB
Attn. Mr. T. John Eriksson
P.O. Box 43
782 00 Malung
Telex: 0280/11740

* Those marked by asterisk were indicated by IMPOD as to be contacted first.

Elmo-Calf Ab
P.O. Box 133
512 01 Svenljunga

AB Wilh. Gronvalls Laderfabrik
Fack
262 01 Angelholm

Kloppans Laderfabrik AB
P.O. Box 6
262 00 Klippan

*Gvaceladerfabriken
Attn. Mr. Frans Moller and Mr. Moqens Moller
244 00 Kavlinge
Tel. 046/731300

Axel Bodens Handels AB
Attn. Mr. Bodel
P.O. Box 6066
102 31 Stockholm
Tel. 08/305623

* Those marked by asterisk were indicated by IMPOD as to be contacted first.

CHAPTER EIGHT

Market Prospects for Animal Casings

With respect of animal casings the most interesting contact made was in Helsinki with the Finnish Farmers' Meat Marketing Association (TLK).

TLK, a huge organization with 24 export slaughterhouses and 16 sausage factories, handles over 50% of all finished meat and meat products exports and imports, and has 55% of the home market for meat products and over 60% of domestic meat consumption.

All animal casings are handled in TLK¹'s own selection plants and slaughterhouses and the following calibers of sheep casings are used: for around 20% 18–20 mm, for 80% 20–22 mm.

The Association prefers to import sorted casings in 100 yard hanks in "easy-fill" form, i.e., casings already squeezed, selected, moistened, and packed in plastics bags. Its total sheep casings requirements are about 20,000 hanks per month.

The hanks must be packed into plastic barrels with not more than 500 per barrel. Veterinary certificates to certify suitability for human consumption is required.

Latest average prices paid for strictly calibrated casings were 25–30 Finnish markkas per hank for 20–22 mm, and Finnish markkas 20 for hanks of 18–20 mm (1 Finnish markka equals about US\$ 4.15).

TLK would agree, upon submission and approval of samples, to enter into short-term (6 months) contracts, specifying monthly deliveries, with Afghan suppliers. It would also be willing to extend technical assistance if cooperation was established.

P. Broste A/S of Copenhagen is also interested in animal casings. They import the following calibers: 18–20 mm, 20–22 mm, and above 22 mm. Some business can eventually be developed with this firm.

In Sweden contact was also made with Mr. Bangt Tornkvist, of Tarras-Bergstrand, with respect to animal casings who estimated total Swedish casings imports at more than 50 million Swedish crowns a year. Mr. Tornkvist showed interest in animal casings from Afghanistan and asked some samples for test selection. The company mainly imports 20 to 22 mm casings, with smaller quantities of 18–20 mm (for hot dogs), and very little of 22–24 mm caliber. Major suppliers are Turkey and other Middle Eastern countries. All selection and calibration is done in Turkey with equipment furnished by Stridsmaskiner Co. of Gothenburg. Prices are quoted C&F Istanbul. They, too, expressed willingness in developing technical assistance co-operation with Afghan traders.

SORTED SAMPLES TO BE SENT TO

1. TUOTTAJAIN LIHAKESKUSKUNTA (Finnish Farmers Meat Marketing Association)

Attn. Mr. Mikko Heino, Manager, Casings and Material Department

Helsinki, Finland

Telex: 12-813

2. P. BROSTE A/S

Attn. Peter Broste, Director, and

Age Winther, Food Dept. Manager

Overgaden oven Vandet 10

1415 Kobenhavn K, Denmark

Telex: 31380 or 31382

3. TARRAS-BERGSTRAND A/S

Attn. Mr. Bengt Torkvist, Director

Banergatan 3

Stockholm, Sweden

CHAPTER NINE

Market Prospects for Afghan Handicrafts

GENERAL CONCLUSIONS

1. Various interviews in Scandinavian countries made it clear that modern silver and gold Afghan jewelry are not particularly desirable on these markets as fashion trends and customers' preferences are entirely different from the more traditional Afghan craftsmanship. Silver content must be 92.5%, gold content minimum 18 carat. Imports are in the main composed of stones or diamonds; very little finished pieces. In most cases distributors require large quantities and completely uniform items, i.e. not handicraft, but industrial products.
2. On the whole, purchasing departments of big department stores were mostly interested in leather goods, glassware and charpoi furniture; the latter, as expected, appealed strongly to Scandinavian buyers. Imitation (traditional) jewelry may also have some possibilities.
3. Of giftware, stone carvings and articles were unanimously appreciated for their craftsmanship and fine quality, but were found too expensive to be included among assortments of department stores, chains, etc.
4. Several textile items, ladies' dresses particularly, appealed to the specialists, but the general view was that trade could only be developed if a close co-operation is established between buyers and Afghan exporters, and if Afghan enterprises catered to importers' specifications and requirements.
5. Several Scandinavian countries already import quantities of Afghan carpets and further developments can be expected in this sector, once their specialized buyers visit Kabul.
6. The mission's conclusion is that to successfully market Afghan handicrafts in Scandinavia is to appoint a suitable agent in each country, or to have one assigned for all four countries who would, eventually, exclusively handle the whole range of handicraft products and deal with distributors.

CONTACTS ESTABLISHED

- (i) P. Broste in Copenhagen: is ready to handle the whole range of Afghan handicrafts on all Nordic markets after having explored these markets on the basis of the handicraft catalogue provided them. They insist, however, on exclusivity. The company is also interested in importing carpets and has experience in developing new products for Nordic markets such as, for example, Polish carpets.

(ii) The Grand Magasin du Nord, the greatest department store in Denmark, has already imported some Afghan carpets and leather products. They expressed particular interest in leather articles, glassware, imitation jewelry, dresses (provided Afghan enterprises agree to work according to specifications given) and, in a much lesser extent, embroideries and giftware. No interest was shown in high quality jewelry, stones, furniture and dolls.

The Grand Magasin du Nord's policy for developing business is to establish personal contacts and relationship with suppliers in countries with which they Co-operate. It is expected that their carpet buyer will visit Kabul this year, and they will revert to the Export Promotion Department on other items after having consulted the catalogue.

(iii) Steentrom A/S, Oslo, the largest department store in Norway, showed interest in several groups of Afghan handicrafts. Mr. O. Aase, head of the furniture purchasing department, was eager to get samples of non-painted charpoi furniture (page 025 of the catalogue, items A, B, E.) His requirements are: (a) Tables measuring 60x120 cm with a 50 cm height, with wood top and no wicker work at the lower part, and (b) the whole somewhat less polished in order to reduce prices slightly. Mr. Aase promised to send to Kabul a comprehensive sample order of the items they are interested in, including charpoi, with other specific requests.

SAMPLES TO BE SENT TO:

1. NORDISKA KOMPANIET (NK)

P.O. Box 7159

S-103 83 Stockholm, Sweden

Telex: 103 57 ENCO S

a) Attn. Ulf Wahlberg, Divisional Merchandise Manager

Charpo furniture (all items on page 025 of the catalogue, except D) with price quotations, and the following information: How many pieces can be put in a 20 ft. or 40 ft container? What is the freight rate via the USSR for one container?

b) Attn. Mrs. Carita Fehrm

Leather belts (items C, D, F, L on page 020 of the catalogue) with price quotations;

c) Attn. Mrs. Helena Granberg

Nightgowns (similar to items G on page 034 or item B on page 030 of the catalogue). NK is interested in nightgowns made on specifications, machine washable, label with instruction of care, and landed price not more than US\$5-6.

2. A/S CHRISTIANA GLASMAGASIN

Attn. Mr. Hans Berg, Director

Stormtorvet 9

Oslo 1, Norway

Cable: GLASMAGASINET

Following items of the catalogue: H, I, L of page 018; H, K, L of page 020 (length of belts: 85 cm)
and A, B, G, H of page 021.

Annex 1

Impressions on the Canadian Market

Because of the dramatic events that took place in Afghanistan during the first week of the mission's visit to Canada, its stay in this country was reduced to a few days. Consequently impressions obtained of the Canadian market's receptiveness to Afghan export products were confined to Montreal, as no visits could be made to Ottawa and Toronto.

In general, prospects for Afghan exports to Canada do not appear to be promising. Most agricultural and livestock export items are imported from within the Western hemisphere and it is evident that Afghan raisins can not compete with Californian raisins, or Afghan edible nuts with those imported from North America such as walnuts and almonds. The only possibility, though limited, would be to promote pistachio imports. No interest was shown in Afghan handicraft products, the mission visited most large department stores, (Eaton's, Simpson's, The Bayth, etc.), and found no handicraft items displayed.

The mission's visit was organized through the Canadian Embassy in Islamabad with contact arrangements made by the Chamber of Commerce in Montreal, the World Trade Centre in Toronto, etc. However, the list of possible contacts submitted to the mission by the Chamber of Commerce was not very useful; the French section of the Chamber prepared a list of about 9 company's addresses, of which 3-4 were not at all interested in Afghan products (fee., a company listed as dealing with raisins was in fact an importer of raisin juice, etc.) On the other hand, executives of the firms contacted by telephone were very busy and all proposed appointments in a week or more time.

The list given by the English section of the Chamber did not even indicate the names of executives or buyers to be contacted. Finding the right persons for example, specialized buyers in the big department stores is a very difficult and time-consuming procedure. In this respect, the mission realized the importance of assistance received in the Scandinavian countries from their respective IMPOD offices, and in Finland from the Finnish Foreign Trade Association, where companies to be visited were not only contacted in advance, their interest in Afghan export items verified, but even the executive or buyer directly responsible for the product in question briefed in advance.

It is clear that promotion of some Afghan goods on the Canadian market can only be done at medium—or long—term and would require a great effort. However, one sample order for carpets with price quotation was obtained:

YERVANT Co.
Attn. Mr. Pierre Labrosse
5255 Desorel
Montreal, Canada

Annex 2

Governmental Departments, Organizations, Firms and Persons Contacted during the Mission

FINLAND

1. *The Finnish Foreign Trade Association* (Co-ordinator of the program)

Arkadiankatu 4–6B

SF–00100 Helsinki 10

Telex: 12–1696, Cable: Foreigntrade, Tel: 12556

Mr. C.G. Tollet, Director

Ms. Vuoripalo

Ms. Simonsen

2. *Ministry of Foreign Affairs*

Helsinki

H.E. C. Lassila, Ambassador

3. *Ministry of Commerce and Industry*

Unioninkatu 5

Helsinki 13

Mr. J. Torasvirta, Head of Bureau

Mr. J. Ilvessalo, Commercial Councillor

4. *Bang & Co.*

Mannerhaimintie 14A

Helsinki

Telex: 12–625, tel: 64.71.31

Mr. A. Tinnila, Managing Director

Mr. H. Hakala, Foodstuffs Dept.

5. *OTK –Central Co-operative Society*

Kaenkuja 3–5, P.O. Box 120

00101 Helsinki 10

Telex: 12–454, Tel: 733 2206

Mr. E. Karppinen, Section Leader

Dried Fruits Section (dried fruits, nuts and almonds)

6. *SOK –Finnish Co-operative Wholesale Society*

Vilhonkatu 7, P.O. Box 60

00101 Helsinki 10

Telex: 12–456, Tel: 650 611

Mr. R. Kuisma, Section Manager (canned goods), Foodstuffs Dept.

Mr. M. Michelsson, Foodstuffs Dept.

7. *Kesko Oy*

Satamakatu 3

00160 Helsinki 16

Telex: 12–748 Tel: 16.221.736

Mr. P. Ulpovaara, Section Manager, Foodstuffs Dept.

Mr. K. Virkhunen, Foodstuffs Dept.

Ms. A. Lolitiner, Leather Dept.

8. *Finnish Wholesalers' and Importers' Association*

Fabianinkatu 23

00130 Helsinki 13

Tel: 11806

Mr. K. Arve, Managing Director

9. *Tuottajain Lihakeskuskunta (Finnish Farmers Marketing Association)*

Vanhatalvitie 5

Helsinki

Telex: 12–813, Tel: 717–911

10. *Turkis Kauppiaaitten Oy*

Keskuskatu 3

00100 Helsinki 10

Telex: 12-1454, Tel: 13522

Mr. A. Ajanko, Sales Manager

11. *Berner Oy*

Etelaranta 4B

Helsinki 13

Telex: 12-447, Tel: 12521

Mr. J. Klemola, Agency Dept.

12. *Tukkukauppojen Oy (TUKO)*

Anttila, Department Stores, Mail Order House

Lonnotinkatu 18

00120 Helsinki 12

Telex: 12-722 antti. Cable: Anttilas, Tel: 60.22.11

13. *Oy Stockmann AB*, Department Stores

P.O. Box 220

00101 Helsinki 10

Telex: 12-733, Tel: 12181

Ms. I. Manner, Buyer

Ms. I. Saarinen, Buyer

14. *Mozumder International*

Mantytie 21

Helsinki 27

Telex: 122492 Mont, Cable:: Mont, Tel: 488.927(8)

Mr. S. Mozumder

15. *Koh-i-Noor*

Korkeavuorenk 13

00130 Helsinki 13

Tel: 629.487

Mr. & Ms. Harriet & Carlo Wrede

16. *Westerback Oy*

Eerikinkatu 7

Helsinki

Tel: 641.234

Mr. G. Westerback, Director

Mr. A. Niemela

DENMARK

17. *.Grosserer Society* – Chamber of Commerce (co-ordinator of program)

Borsen

DK-1217 Copenhagen K

Tel: 15.53.20

Mr. H. B. Hvitved, Commercial Secretary

(in charge of promotion of imports from developing countries)

18. *Nordisk Andelsforburrd* (Scandinavian Co-operative Society)

3, Axeltorv

DK-1609 Copenhagen V

Telex: 27111, Cable: Norforbund, Tel: 15.15.33

Mr. B. Jakobsen

19. *P. Broste A/S*

10 Overgaden oven Vandet

DK-1415 Copenhagen K

Telex: 31380 & 31382, Tel: 54.03.33 & 54.28.00

Mr. P. Broste, Director

Mr. A. Winther (Food Products)

Mr. H. Pelle-Hansen (Medicinal and culinary herbs)

20. *United Nordic Inc. AB (A/S UNIL)*

28 Mileparken

DK-2730 Herlev

Telex: 35146, Tel: 91.14.11

21. *Magasin du Nord – A/S Th. Wessel & Vett*

1, Kristen Bernikows Gade

DK-1095 Copenhagen K

Telex: 15975, Cable: Magdunord, Tel: 11.44.33

Mr. H.E. Pedersen, Assistant Manager (Administration & ACI)

22. *Dansk Tarm-Industri A/S*

137, Vesterbrogade,

Copenhagen

Telex: 15775 DTI, Cable: Willkemp, Tel: 31.68.66

Mr. J. Kemp, Director

Mr. F. Bojsen

23. *A/S Soren Tonsgaards EFTF*

Sortedams Dosseringen 5,

DK-2200 Copenhagen N

Mr. P. Kassen, Director

SWEDEN

24. *Import Promotion Office for Products from Developing Countries (IMPOD)* (Co-ordinator of the program)

Norrmalstorg 1, P.O. Box 7138

103 83 Stockholm

Telex: 13426 Swedimps, Tel: 24.48.40

Mr. L. Lindbarg, Director

Ms. Co Brattstrom

25. *Ministry of Foreign Affairs*

Stockholm

Ms. I. Herzog

Ms. U.B. Croner

26. *Swedish International Development Agency (SIDA)*

Borger Jarlsgatan 61

Stockholm

Mr. J. Westring, Head, Industry Division

Mr. R. Rogeman, Program Officer

27. *Hallen & Rydberg AB*

Burggrevegatan 23

S-411 03 Gothenburg

Telex: 20931, Cable: Hafood, Tel: 031/15.79.50 & 15.79.85

Mr. T. G. E. Hallen, Managing Director

28. *K-H Pack AB*

Halleg 18

S-511 00 Kinna

Tel: 0320/126.66

Mr. K-H. Ostby

29. *AB R. Lundberg*

P.O. Box 104

S-201 21 Malmö

Telex: 32590, Tel: 040/715 45

Mr. H. Liljgren, Director

30. *Hans Boden AB*

Sjovocksbacken 10

S-117 43 Stockholm

Telex: 17704 Hansbo, Cable: Hansboden, Tel: 45.38.52

Mr. A. Lindeberg, Director

31. *AB Baltiska Skinnkompanet* (Hollander affilie)

Birger Jarlsgatan 6B

Stockholm 7

Telex: 1590, Cable: Baltskin, Tel: 22.68.00

32. *Tarras-Bergstrand AB*

Mr. B. Torkvist

Banergatan 4, (private address)

Stockholm

33. *Kooperativa Forbundet* (The Swedish Co-operative Union and Wholesale Society)

Department 410-050

S-245 00 Staffanstorps

Telex: 32737 Foodia, Tel: 040/28.90.00

Mr. Ch. Eckerstrom, Director

34. *United Nordic Inc. AB (UNIL AB)*

S-171 78 Solna

Telex: 17410, Cable: UNILAB, Tel: 08/27.29.80

Mr. B. Forsberg, Manager, Processed Fruit & Canned Meat Dept.

Mr. B. Westman, Import Manager

35. *Nordiska Kompaniet (NK)*

Hamngatan 18-20, P.O. Box 159

S-103 83 Stockholm

Telex: I0357 Enco, Tel: 23.00.00 & 23.63.00

Mr. D. Gren, Chief Buyer

Mr. U. Wahlberg, Disponent, Home Furnishings

36. *Olof Pettersson AB-Guldfynd AB*

Birger Jarlsgatan 37, P.O. Box 140/41

Stockholm

Tel: 23.57.90

Mr. L. Ringman, Director

37. *Alfa-Laval*

P.O. Box 1008

S-221 03 Lund

Telex: 32145 Allund, Tel: 46/14.03.20

Mr. T. Falkenblad, Vice President, Thermal Dairy Division

Mr. J. Hardenmark, Manager, Processes Sales

38. *Kooperativa Furbundet (KF)*

Staebgurder 6

S-10465 Stockholm

Mr. H.E. Vikberg

39. *World Wide Inc. AB*

c/o IMPOD

Mr. M. Jorhvenden

40. *Melles A/B*

Sengels Torg 2

Stockholm

Tel: 14.26.60

Mr. Y. Norden Skjoll

NORWAY

41. *Norwegian Import Procurement Office for Products from Developing Countries (NORIMPOD)*
(Co-ordinator of Program)

Karl Johans gate 5, P.O. Box 8147

Oslo 1

Tel: 11.20.25

Mr. J. Bratt Otnes, Head of Division

Mr. A. B. Berntzen, Deputy Head of Division

42. *The Royal Norwegian Ministry of Foreign Affairs*

7, Juni Plassen 1

Oslo 1

Ms. B. Mo-Alvegaard, Head of Division

43. *A/S Christiania Glasmagasin*

Stortorvet 9

Oslo 1

Cable: Glasmagasinet, Tel: 33.46.80

Mr. H. Berg, Director

44. *Steen & Strom A/S*

Kongens gate 23, P.O. Box 422

Oslo 1

Telex: 18515 Chris N, Cable: Steenstrom, Tel: 41.68.00

Mr. O. Aase, Merchandise Manager as well as 4 buyers of the company

Annex 3

Expected Visits in Kabul as Follow-up to the Marketing Mission

1. A 10 member Norwegian buying mission, headed by J. Bratt-Otnes, Director of the Norwegian IMPOD Office, is planned to visit Afghanistan coming October, subject to official approval by the Ministry of Commerce.
2. Mr. Peter Broste, Director and owner of the P. Broste AB in Copenhagen, plans to visit Afghanistan sometime this year, after having studied sales possibilities of Afghan export products in Nordic markets on the basis of the samples sent.
3. Mr. B Kjeldahl, Assistant Manager, UNIL–Caldano (Copenhagen) will visit Afghanistan, together with a Norwegian colleague (UNIL, Oslo), in the second half of August, to meet raisin and edible nuts producers, processors and exporters.
4. Messrs. L. Linbarg, Official of the Swedish IMPOD, and T.G.E. Hallen, Managing Director, Hallen & Rydberg AB of Gotheburg, proposed to visit raisin and edible nuts producers, processing plants and exporters, to establish personal contacts with officials of the Ministry of Commerce and discuss future areas co-operation.
5. The Grand Magasin du Nord, Copenhagen, will send sometime this year their carpet buyer, who has already visited Afghanistan several times before, to increase their carpet imports as well as explore possibilities of importing various kinds of handicrafts.

INSTITUTION AND INFRASTRUCTURE BUILDING FOR TRADE PROMOTION AT NATIONAL LEVEL

Création du Centre Marocain de Promotion des Exportations

Etude de faisabilité et propositions

par

Victor Segesvary

Décembre 1974

CHAPITRE PREMIER

Les objectifs d'exportation fixés par le Plan

Le Plan de développement économique et social 1973–1977 reconnaît pleinement que « le développement des exportations s'avère être une nécessité inéluctable et une condition du décollage économique » pour le pays (Vol. I. *Perspectives générales de développement*, p. 48). Les insuffisances d'une politique de substitution aux importations sont admises de même le fait que la mise en valeur du travail de la main-d'oeuvre abondante par l'exportation des produits industriels ne peut être réalisée que si les industries protégées, au lieu de s'efforcer seulement de remplacer les importations par une production nationale, tournent résolument vers les activités exportatrices.

Le document du Plan met en évidence qu'un très important effort doit être entrepris dans les domaines de l'industrie et de l'artisanat qui nous intéressent plus particulièrement, car

« La protection douanière dont bénéficient certains secteurs depuis de longues années, certaines pratiques malthusiennes et volontairement restrictives dans certaines branches de l'activité économique ainsi que l'endettement et la désorganisation de certaines autres ont ôté à ces branches toute compétitivité. Une action concertée de l'Etat et des professionnels de la branche doit conduire rapidement à une restructuration indispensable et à un redimensionnement en fonction non seulement du marché local, mais également du marché extérieur. Cette réorganisation interne donnera une plus grande compétitivité à nos entreprises et permettra de lever certains contingents et de libéraliser progressivement le commerce extérieur. Cette politique de libéralisation et de décontingentement serait insuffisante si parallèlement des mesures particulières ne sont pas prises pour faciliter la tâche des exportateurs et les mettre dans les mêmes conditions administratives, économiques et financières que les exportateurs des autres pays » (*ibid.* p. 49).

Conformément aux prévisions de croissance de la production, un taux de croissance annuel global d'environ 10% était fixé pour l'ensemble des exportations marocaines. Toutefois, pour atteindre cet objectif ambitieux la responsabilité principale incombera aux industries manufacturières en plus, bien entendu, du secteur minier (voir Tableau 1).

1. LES PRODUITS AGRICOLES

Un programme particulièrement important a été préparé par l'Office de commercialisation et d'exportation (OCE) concernant ces produits. Il devra être mis en application au cours du quinquennat pour dégager la production maraîchère et de primeurs de la stagnation persistante constatée pendant les dernières années. Dans ce but, il est prévu :

- L'adaptation de la production agricole marocaine aux exigences des marchés extérieurs ;
- Le développement et l'adaptation du conditionnement et de l'emballage selon les besoins du consommateur étranger ;
- La coordination des divers moyens de transport et surtout ceux du transport maritime, afin que ces produits puissent parvenir aux marchés de destination dans les meilleures conditions ;
- L'intensification de la recherche et de la promotion de nouvelles cultures, — que ce soit par de nouvelles techniques de culture de produits traditionnels ou par la recherche et le développement de nouveaux produits.

Le taux moyen de croissance des exportations de ce secteur est prévu par ce programme d'atteindre à 4,7% par an.

2. LES PRODUITS MINIERES

Entre 1973 et 1977 le Plan a prévu une croissance annuelle moyenne de 12,7% des exportations de phosphates et de 12,3% pour les autres minerais. Toutefois, les bouleversements qui caractérisent le marché mondial de ces produits depuis l'automne 1973, et la crise de l'énergie ont bousculé ces prévisions ainsi que le démontre l'analyse des exportations marocaines, en particulier les résultats des sept premiers mois de l'année en cours. Les gains substantiels obtenus par le triplement à l'exportation du prix des phosphates ont été notablement réduits par l'inflation mondiale et l'augmentation considérable du prix des équipements et des produits finis importés. De ce fait le rôle 'moteur' assigné aux exportations des produits manufacturés devient encore plus important.

3. LES PRODUITS MANUFACTURES

Les produits manufacturés représenteront 32% des exportations totales en 1977 contre 20% en 1973, selon la prévision du Plan. Toutefois, celle-ci subira une révision à la suite de l'augmentation spectaculaire des recettes en provenance de la vente de phosphates dont la part dépassera 50% des exportations totales.

Même si l'on ne tient pas compte du volume des exportations établi par le Plan pour chaque industrie transformatrice en termes absolus, ou des changements structurels qu'il prévoit (la part de chaque groupe de produits dans les exportations totales), les objectifs fixés en termes de croissance peuvent, selon toute probabilité, être tenus comme valables et indiquent l'évolution future.

Tableau 1

Activité industrielle	Taux de croissance annuel 1973 – 1977 (en pourcentage)
Sucre, confiserie, thé, chocolat	3,0%
Viande, conserves et froid	3,5%
Corps gras et produits laitiers	8,2%
Grains et farines	38,0%
Boissons et tabac	—
Matériaux de construction et de verre	50,0%
Produits sidérurgiques et métaux non ferreux	27,0%
Métaux, biens intermédiaires et d'équipement	—
Matériel de transport	25,0%
Métaux, biens de consommation	14,2%
Textiles	16,4%
Bonneterie et confection	29,4%
Cuir	8,5%
Chaussures en cuir	10,0%
Chimie	11,9%
Parachimie et pharmacie	11,9%
Caoutchouc — amiante	8,4%
Papier — carton	12,8%
Bois — ameublement et divers	2,0%

Source : Royaume du Maroc. Premier Ministre. Secrétariat d'Etat au Plan, au Développement régional et à la formation des cadres. *Plan de développement économique et social, 1973–1977*. Vol. I. *Perspectives générales de développement*, pp. 105–106

Pour les produits secondaires (produits manufacturés, phosphates et autres produits miniers), le Plan prévoit un taux de croissance annuel des exportations de 12,9%. Si l'on déduit du volume des exportations totales du secteur secondaire celui des phosphates et minerais, ce même taux s'établit à environ 11% pour les industries manufacturières.

4. LES PRODUITS DE L'ARTISANAT

Sur le plan des exportations des produits artisanaux, l'objectif est un accroissement de 90% au cours de la période 1973–1977, soit un taux de croissance annuel d'environ 16%. Par groupes de produits artisanaux, les taux de croissance ont été établis comme suit (vu la carence des données statistiques, les projections sont basées sur l'extrapolation des tendances du passé).

Tableau 2

Produits artisanaux	Taux d'accroissement des exportations 1973 – 1977 (en pourcentage)
Maroquinerie	74,1%
Ouvrages en bois	122,0%
Tapis	83,0%
Vêtements marocains	121,5%
Poterie	121,4%
Cuivre	152,0%
Artisanat divers	121,5%

Source : *Plan de développement économique et social*. Vol. II. *Développement sectoriel*, p. 393.

En ce qui concerne deux groupes de produits artisanaux, la vannerie et les babouches, leurs exportations vont fortement décroître, de 34,4% et de 76,2%, respectivement, entre 1973 et 1977.

CHAPITRE DEUX

La politique gouvernementale d'encouragement des exportations

A. LES ORIENTATIONS DU PLAN 1973–1977 EN MATIERE D'INDUSTRIE ET D'ARTISANAT

Les orientations industrielles du Plan de développement économique et social 1973–1977 réaffirment clairement l'intérêt fondamental du gouvernement dans le développement des exportations :

« L'orientation dominante du Plan 1973–1977 pour l'industrie est la promotion des exportations de produits manufacturés. En effet, l'étroitesse du marché intérieur ne permet pas un développement suffisant de notre industrie. Malgré l'existence d'un marché potentiel de plus de 15 millions d'habitants, les habitudes d'autoconsommation en milieu rural et la croissance lente des revenus réels réduisent considérablement le marché réel. Il faut donc exporter pour pouvoir augmenter l'activité de ce secteur de l'économie et ainsi créer des emplois ». (*Plan de développement économique et social 1973–1977. Vol. II. Développement sectoriel*, p. 372.)

Cet objectif devra être atteint par

— L'augmentation du taux d'utilisation de la capacité de production

En effet, le taux d'utilisation des capacités dans la plupart des branches industrielles n'excède pas 50 à 80% et le Plan a fixé l'objectif de taux d'utilisation de 85% pour 1977 et les projections de production et de valeur ajoutée par branche en ont tenu compte.

— La rationalisation de la gestion

L'objectif est la rentabilisation des entreprises tout en maintenant des prix de revient compétitifs sur le marché mondial ; des efforts seront donc entrepris afin d'introduire une gestion rigoureuse dans les domaines comptable et financier ainsi que dans celui des stocks de matières premières et de produits finis.

— L'organisation de la promotion industrielle par la mise en place d'un ensemble de mesures administratives, juridiques et institutionnelles susceptibles de supprimer la plupart des entraves au développement industriel. Ces mesures comprendront : l'amélioration de l'efficacité de l'administration ; l'amélioration de l'accueil et de l'orientation des investisseurs ; l'harmonisation des politiques agricole et industrielle, et, enfin, l'amélioration de la productivité industrielle. Ces mesures seront complétées par une politique économique régionale à travers l'application du nouveau Code des investissements industriels.

Il est prévu un investissement de 3,6 milliards de DH (dirham marocain) en projets nouveaux pour atteindre l'objectif de l'augmentation de 65% des exportations de produits manufacturés entre 1973 et 1977, reflétant un taux de croissance annuel de 11%.

En raison de l'insuffisance des projets industriels identifiés et disponibles au moment de la préparation du Plan, un crédit de 20 millions de DH est inscrit pour la réalisation des études nécessaires dont seront chargés la Direction de l'Industrie et l'Office de développement industriel.

Pour faciliter l'adaptation de l'artisanat marocain aux conditions nouvelles de l'époque actuelle, il est envisagé de regrouper les artisans en entreprises suffisamment grandes, pratiquant des méthodes de gestion modernes et disposant du matériel et des fonds nécessaires. Dans ce sens, les coopératives peuvent jouer un rôle important ainsi que le Centre de recherche de promotion de l'artisanat, chargé de la recherche et de l'innovation qui permettra d'orienter la production artisanale en fonction de la demande.

Une politique d'approvisionnement visant à la revalorisation des matières premières marocaines et une politique de commercialisation des produits finis dont l'objectif est de faciliter l'écoulement de la production, seront mises en application. En ce qui concerne ce dernier point, le renforcement de la Maison de l'artisanat et de la COOPARTIM permettra une meilleure information des producteurs par la prospection des nouveaux marchés et la participation aux foires et expositions nationales et internationales.

En outre, le développement de la formation professionnelle et la régionalisation du programme d'action en faveur de l'artisanat complètent les orientations données par le Plan en ce domaine.

B. LA POLITIQUE D'ENCOURAGEMENT DES EXPORTATIONS

1. LES MESURES PRISES

— Les encouragements d'ordre fiscal et financier

Le dahir portant loi n° 1-73-408 du 13 août 1973 a institué les mesures d'encouragement suivantes pour les entreprises industrielles ou artisanales exportatrices :

(a) L'exonération totale et automatique de l'impôt sur les bénéfices professionnels à concurrence du montant du chiffre d'affaires à l'exportation, pendant les dix premières années consécutives à l'exploitation d'une entreprise nouvelle ou pendant les dix premières années consécutives à la publication de dahir pour les entreprises existantes à cette date.

(b) Le transfert du produit de liquidation est garanti à concurrence du montant du capital investi par un étranger dans une entreprise nouvelle ; toutefois, le transfert de la plus-value est soumis à l'autorisation de l'Office des changes.

(c) La garantie de transfert des dividendes nets d'impôts distribués aux non-résidents est accordée sans limitation.

(d) Pour frais de prospection des marchés extérieurs, de fonctionnement des bureaux de représentation à l'étranger et de publicité, les entreprises bénéficient d'une dotation annuelle en devises à concurrence de 3% du montant du chiffre d'affaires réalisé à l'exportation.

Ces mesures d'encouragement s'appliquent à presque tous les secteurs d'activités industrielles ou artisanales définis par le décret n° 2-73-411 du 14 août 1973 du Premier Ministre (voir Annexe 1).

— *Régimes économiques en douane*

Le dahir portant loi n° 1-73-178 du 17 avril 1973 a institué deux catégories de régimes économiques en douane :

— Les régimes suspensifs — entrepôts de douane, admission temporaire, importation temporaire, trafic de perfectionnement à l'exportation, exportation temporaire, transit — permettant le stockage, la transformation, l'utilisation ou la circulation des marchandises en suspension de droits de douane, de taxes intérieures de consommation ainsi que de tout autre droit et taxe dont elles sont passibles.

— Le régime de drawback permettant le remboursement, sur la base d'un taux forfaitaire, de certains droits et taxes perçus à l'importation des matières d'origine étrangère entrant dans la fabrication de marchandises exportées.

— L'assurance à l'exportation

Le dahir portant loi n° 1-73-366 du 23 avril 1974 a créé une assurance d'Etat à l'exportation comprenant l'assurance crédit, l'assurance prospection et l'assurance foire.

L'assurance crédit garantit l'exportateur contre le risque de non recouvrement de sa créance dans la mesure où celui-ci résulte de la réalisation dans les conditions qui sont fixées par décret du Premier Ministre (n° 2-73-29 du 24 avril 1974), les risques politique, catastrophique, monétaire ou commercial ordinaire ou extraordinaire définis, eux aussi, par le même décret. La quotité garantie pour la couverture des risques inhérents à l'assurance crédit ne peut excéder 90% du montant de la créance née de l'exportation.

L'assurance prospection garantit aux personnes qui prospectent les marchés extérieurs en vue de la recherche de débouchés, le remboursement des frais engagés à l'occasion d'une prospection qui se révèle infructueuse ou dont les résultats s'avèrent insuffisants pour amortir les frais encourus. Ce remboursement ne peut excéder 50% des frais engagés.

L'assurance foire garantit aux exposants participant à une foire commerciale internationale à l'étranger le remboursement des frais qu'ils ont engagés à cette occasion dans le cas où ils n'auraient pas réalisé un chiffre d'affaires leur permettant de couvrir entièrement ces frais. Ce remboursement ne peut excéder 50% des frais engagés.

Au sens du décret n° 2-73-299 du 24 avril 1974 du Premier Ministre, la gestion de l'assurance à l'exportation est confiée à la Banque marocaine du commerce extérieur (BMCE).

Une Commission des assurances à l'exportation a également été créée, composée de représentants des différents ministères intéressés, de la Banque du Maroc et de la BMCE.

— *L'assouplissement des procédures administratives*

Comme prévu par le Plan, des sous-délégations de l'Office des changes ont été créées à Fès et à Marrakech afin de faciliter aux exportateurs le règlement des questions financières relatives à leurs ventes ou leurs voyages d'affaires à l'étranger. En outre, dans certaines limites, les autorités ont délégué aux banques intermédiaires agréées le pouvoir de délivrer aux exportateurs des allocations en devises lors de leurs déplacements à l'étranger.

2. LES MESURES ENVISAGÉES

— *Création d'un Conseil supérieur des exportations*

La création d'un Conseil supérieur des exportations est prévue. Ce Conseil groupera les représentants des exportateurs et ceux des départements responsables du commerce extérieur aux fins de mettre au point la stratégie nationale à suivre dans le domaine de la promotion des exportations et de coordonner en permanence les actions.

— *Carte d'exportateur*

La création d'une carte d'exportateur numérotée aura pour objet de répertorier les personnes physiques et morales auxquelles divers avantages seront accordés. La validité de cette carte sera renouvelée annuellement en fonction des résultats obtenus à l'exportation.

— *Sensibilisation des entreprises*

Une campagne d'information concernant la conquête des marchés extérieurs par l'expansion des exportations est aussi prévue. Le nouveau système mis en place par les pouvoirs publics dans le cadre de la promotion des exportations devra non seulement informer, conseiller, soutenir les industries exportatrices, mais également assurer une présence permanente et dynamique qui seule permet de suivre le client et le solliciter au lieu d'attendre ses demandes éventuelles.

— *Mesures diverses*

Il est reconnu que l'action de promotion des exportations doit être accompagnée par des mesures concernant la normalisation (adaptation aux normes internationales), le contrôle de qualité, l'amélioration de la productivité et le perfectionnement de la main-d'oeuvre.

Mais la plus importante de ces mesures dites d'accompagnement sera la création d'un *Centre de promotion des exportations*, appuyé sur un réseau de conseillers économiques et commerciaux à l'étranger, création qui est le véritable objet de ce rapport.

CHAPITRE TROIS

Le potentiel d'exportation du Maroc

A. L'EVOLUTION GENERALE

Les exportations marocaines se sont élevées à 3 746 milliards de DH en 1973, soit un accroissement de 52,5% par rapport à 1969, année où elles n'avaient atteint que 2'455 milliards de DH.

Cette évolution n'est pas uniforme : le taux de croissance des exportations qui n'était que de 0,6% entre 1969 et 1970 et de 2,2% entre 1970 et 1971, s'est brusquement élevé à 16,9% entre 1971 et 1972 pour atteindre 26,9% entre les deux dernières années de la période examinée (1969–1973).

Ce phénomène s'explique par le fait que les valeurs indiquées par les statistiques du commerce extérieur sont données en termes courants et non pas en termes constants. Il est donc logique de considérer, comme le fait le *Plan de développement économique et social, 1973–1977* (Volume I. *Perspectives générales de développement*, p. 103 et ss.) que le taux de croissance moyen annuel, en termes réels, des exportations marocaines n'était que de 5 à 6%.

B. ANALYSE STRUCTURELLE DES EXPORTATIONS

1. REPARTITION DES EXPORTATIONS PAR REGIONS OU GROUPEMENTS ECONOMIQUES

Parmi les régions ou groupements économiques, la Communauté économique européenne (CEE) reste le client le plus important du Royaume du Maroc. Alors qu'elle avait absorbé 58,8% des exportations du pays en 1969 (1'444 milliards de DH) celles-ci avaient représenté 64,6% du total en 1973 (2 418 milliards de DH).

Par contre, les ventes marocaines à destination des pays socialistes de l'Europe de l'Est montrent une nette régression au cours de la période 1969–1973. Cette région qui représentait 9,64% du total des exportations marocaines en 1969 avec 222 millions de DH, ne représentait plus que 6,8% en 1973, bien qu'en valeur absolue ses importations en provenance du Maroc aient atteint 254,1 millions de DH.

Les pays du monde arabe ont augmenté légèrement leurs achats au Maroc avec 4,5% du total des exportations marocaines (169,4 millions de DH) en 1973 contre 3,8% (95,2 millions de DH) en 1969. Toutefois, les importations de l'Algérie et de la Tunisie en provenance du Maroc ont représenté à elles seules 3,8% du total.

Le pourcentage des exportations marocaines vers l'Afrique n'a pas changé entre 1969 et 1973 (2%) bien que leur volume global a presque doublé, passant de 49,2 millions de DH à 73,2 millions de DH.

2. ANALYSE DES EXPORTATIONS PAR PRODUITS

L'analyse des exportations marocaines selon les catégories de la nomenclature de Bruxelles (NDB) révèle que celles-ci représentent 80% du total ; à elles seules, trois catégories constituent plus de 50% de ces exportations quoique la part des deux dernières ait légèrement régressé entre 1969 et 1973 (les pourcentages entre parenthèses indiquent, la part du total en 1969) : *Chap. 7* — Légumes, plantes, racines, tubercules alimentaires, 14,6% ; (13,5%) ; *Chap. 8* — Fruits comestibles, écorces, agrumes et melons, 15,2% (17,1%), et *Chap. 25* — Sel, soufre, terre., plâtre, chaux, ciment, 21,5% (22,9%).

Viennent ensuite par ordre d'importance : *Chap. 26* — Minerais métallurgiques, scories et cendres, 5,7% (7,8%) ; *Chap. 16* — Préparation de viande, poissons, crustacés et mollusques, 5,1% (5,04%) ; *Chap. 20* — Préparation de légumes, plantes potagères, fruits, etc., 4,4% (4,1%) ; *Chap. 15* — Graisses, huiles d'origine animale et végétale et leurs dérivés, 3,4% (4,3%) ; *Chap. 22* — Boissons, liquides alcooliques, vinaigre, 2,6% (1,9%) ; *Chap. 58* — Tapis, tapisseries, velours, peluches, 2,3% (0,8%) ; *Chap. 31* — Engrais, 2,2% (2,1%) ; *Chap. 45* — Liège et ouvrages en liège, 1% (1,1%) ; *Chap. 47* — Matières servant à la fabrication du papier, 0,9% (0,9%) ; *Chap. 73* — Fonte, fer et acier, 0,7% (0,5%).

Trois catégories, d'un volume relativement restreint, ont montré le plus grand dynamisme en dépassant, pour la période 1969–1973, un taux d'accroissement de 100% : *Chap. 58*, 318% ; *Chap. 53*, 118%, et *Chap. 22*, 105%.

L'exportation de quatre autres catégories, les *Chap. 7, 20, 31 et 16*, a. progressé à un taux plus élevé que la moyenne annuelle, par 5,5, 64,4, 59,5 et 53,1%, respectivement.

Le rythme de croissance des catégories suivantes n'a pas atteint le taux d'accroissement annuel moyen : *Chap. 25*, 43,2% ; *Chap. 47*, 40,4% ; *Chap.*, 8, 35,2% ; *Chap. 45*, 34,9% ; *Chap. 15*, 21,2% et *Chap. 26*, 11,9%.

3. TENDANCES RECENTES : LES EXPORTATIONS MAROCAINES EN 1974

Pendant les sept premiers mois de 1974, les exportations marocaines ont fortement progressé par rapport à la même période de l'année précédente ; elles se sont développées en moyenne de 75,8% entre janvier et juillet 1974, ce qui représente un accroissement de 1,74 milliard de DH des recettes en devises.

La progression n'était pas uniforme ; les taux d'accroissement mensuels, par rapport aux mois correspondants de 1973, étaient les suivants ; janvier 48% ; février 48%, mars 53%, avril 68%, mai 83%, juin 93%, et juillet — un bond en avant spectaculaire — 156%. Ceci s'explique principalement par le fait que les ventes de phosphates ont démarré assez tardivement, mais ont effectué un rattrapage considérable en juillet. En outre, dès le 1er janvier 1974 a été appliqué le nouveau prix à l'exportation des phosphates — 60/63 dollars EU la tonne — ce qui a largement contribué à l'excellence de ce résultat.

Cependant, si on exclut les phosphates de l'appréciation de la performance des exportations en 1974, il s'avère qu'elles n'ont enregistré que des taux d'augmentation relativement faibles, essentiellement à cause du fléchissement notable des exportations des produits agricoles traditionnels.

Tableau 3

	J.	F.	M.	A.	M.	J.	J.	7 mois
Taux de progression des exportations hors phosphates	-10%	+5%	+3%	+19%	+30%	+29%	+32%	+15%
Ventes des agrumes et des primeurs	23%	-17%	-24%	+18%	-15%	-53%	+3%	-19%

Source : Royaume du Maroc, Ministère des finances. Office des Changes

En effet, le secteur 'Alimentation, boissons et tabacs' montre un recul de 14,05 millions de DH pour les recettes, soit moins de 12,3%, et à part les poissons en conserves (+35,7%), les pommes de terre sauf les pommes de terre de semence (+7%), les conserves de légumes sans vinaigre (+38,1%), les plantes et légumes potagers desséchés (40,9%) et quelques autres postes de moindre importance, les exportations ont régressé au cours des sept premiers mois de l'année par rapport à la période correspondante de 1973. Le recul est de 23,3% pour les agrumes et de 26,2% pour les tomates fraîches, — les deux produits agricoles d'exportation les plus importants du Maroc.

Parmi les 'Produits bruts d'origine animale et végétale', l'huile d'olive brute et raffinée représentant le volume le plus grand, a enregistré, pendant la même période, une progression remarquable (55,7%) ainsi que la pâte à papier (+108%), l'huile de grignon alimentaire (+133%) et les plantes et parties de plantes (+53%). Le taux de croissance moyen des ventes à l'étranger de ce secteur était de 28,7% représentant une entrée supplémentaire de presque 60 millions de DH par rapport à janvier-juillet 1973.

Il est évident que dans la situation actuelle de l'économie mondiale, les 'Produits bruts d'origine minérale' devaient tous enregistrer une forte augmentation de leurs exportations, de façon parfois

spectaculaire, rapportant à l'économie marocaine un excédent de devises d'une récolte additionnelle de 1,6 milliard de DH (+268%). L'augmentation des exportations des phosphates de calcium a, de loin, dépassé ce pourcentage avec un taux de croissance de 317% entre janvier et juillet 1974 en comparaison avec les sept premiers mois de l'année précédente. Pour le plomb ce taux était de 75%, pour le manganèse de 56,9\$, pour le fer de 277\$, pour l'antimoine de 171,5\$, pour le zinc de 70,8\$, pour le cobalt de 81,2%, pour le cuivre de 185% et pour le sulfate de baryum de 23%.

Dans le groupe de 'Demi-produits', seuls les cuirs et peaux ont régressé (-20,1%) mais les fils de fibres synthétiques et artificielles pour tissage ont montré un dynamisme extraordinaire avec un taux d'accroissement de leurs exportations de 522%, suivies des engrais naturels et chimiques avec 98%, le liège ouvré et aggloméré avec 37,3% et, finalement, les huiles volatiles et essences avec 26,9%. La progression moyenne de ce groupe était de 76,5% pour cette même période avec une augmentation de recettes de 110 millions de DH.

Deux postes relativement mineurs, les 'Produits finis d'équipement agricole' et 'Produits finis d'équipement industriel' a connu entre janvier et juillet 1974. Un fléchissement considérable par rapport aux ventes effectuées durant les sept premiers mois de 1973, 76% et 15,1% respectivement ; pour la seconde catégorie, la régression marquée des exportations de camions (15,3%) est la principale cause de ce fléchissement.

L'évolution du groupe des 'Produits finis pour consommation' est une source de satisfaction pour les responsables de l'économie marocaine, avec un taux d'accroissement moyen de 70% au cours des sept premiers mois de 1974. Ce sont les tissus de fibres synthétiques et artificielles dont les exportations ont ait la progression la plus remarquable avec 173% et les articles de bonneterie avec 119% ; les vêtements confectionnés (+72,9%) les chaussures sauf babouches (+52,5%), la maroquinerie, sacs, articles de voyage (+41%) et les articles de ménage (+31,4%) avaient également participé dans cette progression quoique avec un taux d'accroissement se situant en dessous de la moyenne, mais ce sont les tapis à points noués qui ont fait montre d'une performance très faible en n'enregistrant qu'une croissance de 2,8% de leurs exportations.

Les autorités prévoient que les exportations totales marocaines atteindront 7,6 milliards de DH au cours de l'année 1974 (donc un total de 3'564 milliards de DH pour les cinq mois restants), soit une progression de 103% par rapport aux exportations totales de 1973. Les exportations des phosphates représenteront 51,3% de ce total, celles des autres produits 48,7%.

4. LE POTENTIEL D'EXPORTATION DES PRODUITS INDUSTRIELS ET ARTISANAUX

L'analyse des exportations industrielles et artisanales du Maroc par produit et par destination permet d'estimer le potentiel d'exportation actuel du pays. Les taux d'accroissement prévus par le Plan quinquennal pour les différentes branches donnent leurs dimensions futures ; le tableau suivant énumère le volume total des exportations par branches d'activité en 1973 et les taux de croissance annuels prévus par le Plan pour la période 1973-1977.

Tableau 4

Branche d'activité industrielle	Valeur des exportations 1973 (en millions DH)	Taux de croissance annuel 1973–1977 en %
Résidus d'extraction d'huile	8,9	8,2
Produits pharmaceutiques	7,3	11,9
Engrais	83,4	11,9
Huiles essentielles et résinoïdes	18,6	11,9
Cuir et produits en cuir	23,0	8,5
Chaussures en cuir	12,6	10,0
Bois, placages et contreplaqués	8,5	2,0
Liège et ouvrages en liège	25,8	11,9
Pâte à papier, papier et carton	41,8	12,8
Textiles (fils et tissus)	98,1	16,4
Bonneterie et confection	73,1	29,4
Matériaux de construction et verre	6,4	50,0
Ferrailles et déchets de cuivre	19,3	—
Matériel de transport	30,3	25,0
Appareils divers	12,5	14,2
Caoutchouc et amante	2,7	8,4

Branche d'activité artisanale	Valeur des exportations 1973 (en millions DH)	Taux de croissance annuel 1973–1977 en %
Maroquinerie	17,1	74,1
Tapis	80,8	83,0
Vêtements marocains	4,5	121,5
Cuivre	4,9	152,0
Artisanat divers	4,1	121,5

Source : Royaume du Maroc, Ministère des finances. Office des Changes
Statistiques du commerce extérieur 1973.
Royaume du Maroc. Premier Ministre. Secrétariat d'Etat au Plan, au Développement régional
et à la Formation des cadres. *Plan de développement économique et social, 1973–1977*. Vol. I. *Perspectives générales de développement*, pp. 105–106).

CHAPITRE QUATRE

Les organismes actuels chargés de la promotion des exportations

Le Ministère du commerce de l'industries des mines et de la marine marchandes et, plus particulièrement, la Direction du commerce extérieur sont en premier lieu responsables de la politique d'expansion commerciale et de la promotion des exportations du Maroc. Il existe cependant un certain nombre d'organismes auxquels il incombe, entre autres tâches relatives à la production, à la recherche, etc., de promouvoir les exportations d'un secteur spécifique de l'économie nationale. D'autres entreprennent des opérations promotionnelles mais seulement en tant que service rendu à leur clientèle.

Parmi ces organismes figurent l'OCE, le BRPM, la BMCE dont une brève description des attributions et du fonctionnement se trouve dans ce chapitre, mais aussi l'Office chérifien des phosphates (OCP) et les associations professionnelles, qui exercent une activité importante en vue de favoriser le développement des exportations.

1. L'OFFICE DE COMMERCIALISATION ET D'EXPORTATION (OCE)

L'Office de Commercialisation et d'exportation fut créé par le décret royal n° 223~65 du 9 juillet 1965.

L'OCE s'est vu attribuer l'exclusivité de l'écoulement et de la commercialisation à l'exportation des produits suivants :

- Agrumes
- Fruits et légumes frais
- Produits artisanaux
- Produits de l'industrie du poisson
- Conserves de fruits et légumes, y compris les jus.

L'Office est autorisé à réaliser toutes les opérations commerciales et financières se rattachant à cet objet, notamment celles pouvant favoriser le développement de l'exportation de ces produits. L'Office est habilité, en outre, à procéder au contrôle technique de la production marocaine à l'exportation et à prendre ou proposer toutes mesures susceptibles de favoriser le développement des exportations ainsi que de représenter le Maroc à toutes les manifestations d'ordre économique pouvant favoriser la vente à l'étranger des produits marocains.

Une révision du statut de l'Office est en cours pour tenir compte des modifications du contexte économique et commercial intervenues au Maroc durant la dernière décennie. Cette révision touche de près les considérations contenues dans ce rapport, car elle permettra de mieux définir la place du futur Centre marocain de promotion des exportations dans la politique promotionnelle du gouvernement et de délimiter, d'une façon plus précise, les rôles respectifs de l'OCE et de l'institution qui sera créée.

2. LE BUREAU DE RECHERCHES ET DE PARTICIPATIONS MINIERES (BRPM)

Le Bureau de recherches et de participations minières est responsable de l'exportation de tous les produits miniers, à l'exception des phosphates, dont la transformation et l'exportation sont à la charge de l'Office chérifien des phosphates (OCP).

Les textes législatifs créant le BRPM et régissant son fonctionnement et ses activités ne font aucune mention spécifique de l'exportations considérée comme un aspect de la commercialisation, et encore moins des actions promotionnelles que le BRPM devrait entreprendre à l'étranger pour développer les exportations des produits miniers.

Ces tâches promotionnelles, en particulier les études de marchés, prospection, missions et négociations commerciales relevaient jusqu'à présent des entreprises productrices elles-mêmes. Il semble cependant que le BRPM a l'intention de reprendre en main et de centraliser, dans un proche avenir, toutes ces activités de marketing et de promotion sur les marchés extérieurs. C'est le Service de commercialisation, incorporé dans la Division des exploitations, des participations et de la commercialisation, qui aura la charge de ces opérations.

3. LA BANQUE MAROCAINE DU COMMERCE EXTERIEUR (BMCE)

La Banque marocaine du commerce extérieur, établissement financier semi-public, a passé une convention avec l'Etat marocain le 1^{er} septembre 1959, approuvée par le dahir n° 1~59~391 du 16 novembre 1959, lui assignant un rôle important dans la promotion des exportations marocaines en particulier pour les opérations de financement et de crédit.

Il a été convenu que « en vue de contribuer à la politique du gouvernement en matière de commerce extérieur, la Banque pourra remplir différentes tâches en liaison avec l'Etat qui la chargera notamment de missions d'intérêt public et lui apportera son concours ». Parmi ces missions d'intérêt public de la BMCE, les plus importantes du point de vue de la promotion des exportations sont spécifiées dans l'article 1^{er} de ladite Convention.

La Convention a prévu que la BMCE assurera, à la demande et pour le compte de l'Etat, la centralisation des risques marocains sur l'étranger ainsi que la gestion des services d'aide financière et d'assurances pour le commerce extérieur, y compris l'assurance~prospection, l'assurance contre les risques politiques, catastrophiques et monétaires et les diverses formes de garantie et d'aide

à l'exportation que l'Etat déciderait de créer. Les crédits accordés par les banques aux exportateurs et aux importateurs peuvent aussi être réescomptés par la BMCE. Le système d'assurance à l'exportation créé par l'Etat est, en effet, géré par la BMCE qui assure les autres opérations de financement et de crédit.

CHAPITRE CINQ

Le Centre marocain de promotion des exportations

A. LES HYPOTHESES DE BASE

Les hypothèses de base suivantes ont été définies avec la Direction de la Division du Commerce Extérieur du Ministère du Commerce, de l'Industrie, des Mines et de la Marine Marchande du Royaume du Maroc, en vue de la création du *Centre Marocain de Promotion des Exportations* (CMPE).

(a) L'institution future ne s'occupera pas des problèmes globaux du commerce extérieur marocain, mais seulement de la promotion des exportations. Par conséquent, le volet importation ne figurera pas parmi ses prorogatives. Ce premier principe arrêté se reflète dans le nom proposé pour l'institution à créer.

(b) Il est entendu cependant que le CMPE aura compétence en toute matière se rapportant aux approvisionnements en provenance de l'étranger qui entrent dans la fabrication des produits exportés. La rentabilisation de ces sources d'approvisionnement extérieures figurera donc parmi ses tâches.

(c) Le CMPE aura comme attribution la promotion des exportations de tous les produits exportés qui ne relèvent pas de la compétence d'une institution déjà existante dans ce domaine. Il limitera, par conséquent, ses activités aux produits industriels et artisanaux.

(d) L'institution future aura à intervenir dans la définition de la politique d'investissement, dans les projets d'investissement d'organismes publics ou d'entreprises privées en les orientant par ses conseils, par des études préalables et par l'analyse des conditions et des tendances du marché mondial.

(e) Le CMPE sera placé sous la tutelle du Ministère du Commerce, de l'Industrie, des Mines et de la Marine Marchande. Il aura une autonomie de gestion et une autonomie financière. Son personnel aura son statut propre et ne fera pas partie de la fonction publique.

(f) Sur le plan financier, il doit avoir recours aux dotations et avances de l'Etat et des organismes qui en dépendent. Il bénéficiera, éventuellement, des taxes perçues en sa faveur, mais devra arriver, graduellement, à financer ses propres activités.

(g) Afin de faciliter le démarrage de cette nouvelle institution pendant les trois premières années de son existence, une assistance technique, financée par le Programme des Nations Unies pour le Développement pourrait être demandée par le Gouvernement du Royaume du Maroc.

B. L'ORGANISATION ET LE FONCTIONNEMENT DU CMPE

Il est recommandé au Gouvernement marocain de créer l'institution appelée Centre Marocain de Promotion des Exportations dont les divers aspects organisationnels et fonctionnels seront comme suit :

Le CMPE sera dirigé par un Conseil d'Administration qui fixera les grandes lignes de ses activités, approuvera son budget et ses comptes, etc. Il sera représenté et géré par un Directeur général, secondé par un Secrétaire général dont le travail essentiel sera la coordination entre les différentes divisions de l'institution et la supervision de l'administration générale. Le projet de texte du dahir portant loi, relatif à la création du CMPE, comporte tous les détails nécessaires concernant le pouvoir, les compétences et les responsabilités de ces divers organes directeurs.

La structure organisationnelle du CMPE comprendra quatre divisions opérationnelles, une série de commissions *ad hoc* traitant de problèmes particuliers et spécifiques, et un département d'administration.

1. LES DIVISIONS OPERATIONNELLES

Les quatre divisions opérationnelles seront les suivantes :

- Marketing
- Etudes et Documentation
- Promotion commerciale
- Formation, Presse et Publications

Division Marketing

Cette Division aura un rôle essentiel à jouer dans la promotion des exportations industrielles et artisanales marocaines. Elle traitera directement avec les producteurs/exportateurs afin d'adapter la production marocaine et les conditions de sa commercialisation extérieure aux besoins des consommateurs et utilisateurs étrangers. Sa tâche ne sera pas l'introduction ou l'application des technologies de pointe ou des méthodes nouvelles de fabrication en vue du développement technique des industries marocaines, cette tâche incombe à d'autres institutions existantes ou à créer. La Division Marketing du CMPE devra entièrement axer son action sur l'adaptation des produits marocains exportés ou exportables, leur prix, leur conditionnement et emballage, leur transport vers les différentes destinations, en fonction des exigences des marchés étrangers.

La Division Marketing bénéficiera donc des études des marchés extérieurs, des renseignements et des informations obtenus par la Division Etudes et Documentation. Elle profitera également des expériences faites par la Division Promotion Commerciale et les exposants marocains eux-mêmes, lors de foires, salons spécialisés et autres manifestations commerciales.

En conséquence, les principales tâches de la Division Marketing du CMPE seront :

(a) L'adaptation des produits marocains à la demande étrangère

Réglementations en vigueur ; normalisation internationale ou nationale ; règles imposées par les organismes professionnels du ou des pays concernés ; exigences particulières des importateurs et autres circuits de distribution ; besoins, en constant changement de la clientèle.

(b) Conditionnement, emballage

En collaboration avec l'Institut d'Emballage et de Conditionnement de Casablanca.

(c) Prix

C'est le plus important élément du marketing mix dont l'analyse représente un travail très difficile et délicat. Selon le cas, et en fonction de la compétitivité des produits marocains exportés, il sera souhaitable d'assister les entreprises dans l'application des prix de revient, prix départ-usine, prix f.o.b. ou c.a.f. et de certaines techniques modernes du calcul des prix à l'exportation.

(d) Transport

Le fret peut représenter un élément grevant lourdement le prix à l'exportation de certains produits à cause de leur nature ou de l'éloignement des marchés, c'est donc un facteur qui intervient dans la sélection des marchés-cibles ou des modes de transport. Il faut aussi étudier, d'une façon approfondie, le meilleur moyen d'acheminement des produits vers leur destination qu'ils doivent atteindre en bon état et en respectant les délais de livraison convenus entre vendeurs et acheteurs. Il sera probablement aussi utile d'étudier, en certains cas, l'institution par les compagnies nationales de transport de taux de fret promotionnels pour des produits nouvellement exportés par les industries ou l'artisanat marocains afin de les rendre concurrentiels dans une première phase de l'activité d'exportation. Un effort de coordination sera également essentiel afin d'éviter les retards, la dégradation des marchandises sur les quais en attente d'un cargo, etc. Finalement, les problèmes posés par la manutention, par exemple l'introduction ou l'extension des techniques modernes comme la palettisations, vont de même requérir certaines actions auprès des autorités concernées.

En fonction de l'analyse des exportations marocaines, la Division Marketing sera répartie en cinq sections par produits ou groupes de produits (il est préférable d'éviter des dénominations très larges et plutôt prévoir d'ajouter un nouveau produit, nommément désigné, à une section déjà mise en place, ou créer de nouvelles sections si besoin s'en fait ressentir) :

- Section 1 Textiles, bonneterie, tapis
- Section 2 Engrais, huiles essentielles, médicaments
- Section 3 Cuirs, habillement en cuir, chaussures, maroquinerie
- Section 4 Pâte à papier, papier et carton, liège et ouvrages en liège, bois, matériaux de construction
- Section 5 Produits, des industries mécaniques et électriques.

Cette répartition des produits en diverses sections est faite sur une base empirique, et il serait souhaitable de laisser aux organes directeurs du CMPE assez de latitude et de flexibilité pour qu'ils puissent modifier cette structure initiale au fur et à mesure des besoins.

Une section appelée Orientations industrielles complétera la structure de la Division Marketing. Elle travaillera en étroite collaboration avec les autres sections, plus particulièrement la Division Etudes et Documentation, et orientera les investisseurs éventuels vers des investissements dont la production sera facilement exportable. Cette orientation se fera sur la base d'études des tendances favorables des marchés extérieurs et, bien sûr, en liaison avec les organismes qui, sous un autre angle, travaillent dans le même domaine dont la Direction de l'Industrie et l'Office de Développement industriel.

Division Etudes et Documentation

Il paraît utile de réunir dans une même division les sections d'études et d'analyses et celle de Documentation du CMPE. En effet les premières seront les plus gros utilisateurs du second, une liaison étroite est donc indispensable au bon fonctionnement du CMPE (les sections d'études et d'analyses doivent communiquer tout renseignement, toutes références documentaires à la section de Documentation et l'assister dans l'établissement des listes d'acquisitions). La liaison avec le réseau des représentants économiques et commerciaux sera toutefois du seul ressort de la section Analyses et Etudes.

Quatre sections composeront cette Division :

- Section 1 Echanges, bilan des exportations
- Section 2 Etude de l'offre marocaine à l'exportation
- Section 3 Etudes et analyses des marchés et des politiques commerciales
- Section 4 Documentation

(a) Echanges, bilan des exportations : Cette section analysera d'une façon continue l'évolution des échanges marocains, en particulier celle des exportations. Elle fera le bilan des exportations vers des zones de convertibilité ainsi que celles se faisant dans le cadre d'accords commerciaux et de paiements, sur la base des relevés mensuels de l'Office des Changes. Elle enregistrera aussi les gros contrats de vente passés entre exportateurs marocains et importateurs étrangers et suivra de près les modifications intervenues dans les conditions de commercialisation extérieure. De cette façon, la Direction du CMPE et, par son intermédiaire, les autorités gouvernementales pourront étroitement surveiller la progression ou la régression des exportations dans un domaine ou dans un autre, et prendre rapidement les mesures correctives nécessaires, ou par les actions du CMPE lui-même, ou par celles d'autres instances habilitées à le faire.

(b) Etude de l'offre marocaine à l'exportation : Les études de l'offre marocaine à l'exportation par produit ou groupe de produits, constitueront la 'base indispensable à toute action du CMPE ; elles traiteront, *grosso modo*, des points suivants :

- Description du produit
- Identification dans les nomenclatures internationales
- Evolution et prévision de production
- Structure du secteur de la production
- Prix à la production
- Conditionnement et emballage
- Transport
- Commercialisation intérieure (volume des ventes, circuits de distribution, prix pratiqués sur le marché domestique)
- Evolution et analyse des exportations
- Problèmes de marketing rencontrés dans les différentes phases d'acheminement du produit du producteur au consommateur ou utilisateur
- Esquisse de la demande mondiale et sur les principaux marchés.

Il est généralement reconnu qu'effectuer une telle étude, ou participer à son élaboration est la meilleure formule de formation pour le personnel de l'institution comme le CMPE ; il serait donc souhaitable que chaque personne se joignant à l'équipe de cet organisme fasse une telle étude, sous la direction d'un expert ou d'un ancien, ce qui permettrait, en même temps, de réduire le personnel affecté à cette section.

(c) Etude et analyse des marchés extérieurs : La tâche de cette section sera d'élaborer des études de marchés par produits ou groupes de produits, selon une priorité établie sur la base des conclusions des études de l'offre marocaine à l'exportation et d'un accord commun avec les producteurs/exportateurs, en sélectionnant les marchés-cibles selon une méthodologie stricte et d'une façon systématique. Ces études tendront, d'une part, à ouvrir de nouveaux débouchés aux produits marocains exportés, c'est-à-dire diversifier les marchés d'écoulement des exportations marocaines de biens industriels ou d'articles artisanaux ; d'autre part, elles interviendront sur des marchés traditionnels des exportateurs marocains en cas de régression des ventes, et serviront alors à soutenir et développer les courants commerciaux déjà existants.

La section Etudes et Analyses des marchés extérieurs sera divisée en six bureaux régionaux répartis en fonction de la situation géographique des marchés et leur ressemblance du point de vue des politiques et pratiques commerciales. Ces bureaux seront :

Bureau 1	Communauté économique européenne (le principal client du Maroc) et le reste de l'Europe Occidentale
Bureau 2	Europe de l'Est
Bureau 3	Pays arabes
Bureau 4	Afrique
Bureau 5	Les Amériques ;
Bureau 6	Asie et Océanie

Il est évident qu'au sein du CMPE ces bureaux seront les correspondants immédiats des conseillers économiques et commerciaux marocains postés à l'étranger avec lesquels ils devront travailler le plus étroitement possible.

(d) Section de Documentation :

Bien qu'étant incluse dans une division opérationnelle pour les raisons évoquées ci-dessus, le rôle de la section de Documentation n'en sera pas moins essentiel dans le fonctionnement de l'institution. Elle travaillera constamment en liaison avec les bureaux régionaux de la Section Etudes et analyses des marchés, et, par leur intermédiaire, avec le réseau des conseillers économiques et commerciaux.

La section de Documentation, ainsi que son nom l'exprime, ne sera donc ni une bibliothèque ni un service d'archives, mais un outil dynamique du travail du CMPE, des administrations de l'Etat, des entreprises publiques et privées qui devront aussi avoir accès, sous certaines conditions, à cette source d'information précieuse. La section devrait constituer un fonds de documentation et s'abonner, graduellement, aux principales publications périodiques ayant trait au commerce international.

Division Promotion commerciale

Cette Division comprendra trois sections :

- Section 1 Manifestations commerciales et salons spécialisés
- Section 2 Publicité et relations publiques
- Section 3 Missions commerciales et mises en relation d'affaires

(a) Manifestations commerciales et salons spécialisés : La tâche principale de cette section sera de conseiller les instances compétentes et les exposants éventuels dans la sélection des foires et salons auxquels il serait utile d'exposer les produits marocains, mais surtout de préparer la participation des producteurs/ exportateurs à ces manifestations (sélection des produits, élaboration de fiches techniques, de catalogues ou d'autres matériels de vente), d'organiser sur place les contacts avec les hommes d'affaires intéressés et la presse spécialisée (leur soumettre des questionnaires et enregistrer les réponses, etc.). Finalement, cette section doit assurer avec les intéressés le suivi des contacts.

(b) Publicité et relations publiques : A l'instar des manifestations commerciales, les campagnes publicitaires et les activités de relations publiques ne peuvent intervenir qu'après une longue préparation, la publicité étant un moyen très coûteux de promotion commerciale. Le choix des agences, l'évaluation et le contrôle des résultats sont ainsi des éléments importants dont on devrait tenir compte.

(c) Missions commerciales et mises en relation d'affaires : L'organisation de missions commerciales et les mises en relation d'affaires, qui suivent la participation aux foires et salons spécialisés, seront, par excellence, une activité capitale du CMPE. Comme pour les autres sections de la Division Promotion Commerciale, la préparation méthodique de ces missions et de ces contacts sera nécessaire ; le réseau des conseillers économiques et commerciaux y jouera un rôle prépondérant. Il sera possible d'évaluer, à terme, la réussite de ces actions par la réalisation des exportations nouvelles ou la progression sensible des exportations déjà en cours sur les marchés visés.

Division Formation, Presse et Publications

L'activité du CMPE en matière de formation sera répartie entre deux sections. La première s'occupera des cours, stages et voyages d'étude en collaboration avec des organismes internationaux ou bilatéraux et sera, par conséquent, chargée de la formation individuelle ou par groupe ; la seconde visera, plus particulièrement, à la formation collective : producteurs ou exportateurs d'un secteur déterminé ou l'opinion publique en général, par l'organisation de séminaires, colloques ou symposia. Son objectif sera la sensibilisation d'une grande partie des intéressés aux problèmes, besoins et exigences de l'exportation.

L'organisation des cours, stages et voyages d'étude se fera, tout d'abord, au profit du personnel du CMPE même, mais ce ne sera qu'un point de départ ; l'important sera la formation donnée, dans les différents domaines de marketing et de promotion des exportations aux responsables de la commercialisation extérieure ou aux cadres chargés des activités spécifiques des entreprises (par exemple, conditionnement et emballage).

Les séminaires, colloques et symposia devront s'adresser soit aux professionnels d'un secteur et traiter, en conséquence, d'un problème particulier comme, par exemple, les problèmes de la promotion des vêtements en cuir marocains sur le marché américain, soit au grand public, en évoquant l'inévitable nécessité de l'application des méthodes modernes de marketing — études de marchés, conditionnement et emballage comme facteur d'expansion des exportations nationales, etc. Ces manifestations devront être organisées avec le concours des spécialistes nationaux ou étrangers et, tout en sensibilisant l'opinion publique, serviront d'appui publicitaire aux activités du Centre marocain de Promotion des exportations.

Dans ce sens, elles soutiendront la section Presse dont le travail devra être associé à toutes les activités de la Division Promotion Commerciale.

La section Publications, enfin, s'occupera de toutes les publications du CMPE et en gèrera les stocks. Ces publications incluront les différentes études, rapports, notes d'information dont la

distribution sera décidée par les organismes directeurs de l'institution. En outre, une publication régulière, même sous forme ronéotypée, devra être lancée dès que possible, afin d'assurer une liaison permanente entre le CMPE et les administrations, organismes et entreprises. Cette brochure aura également un rôle formateur, notamment par la publication au fur et à mesure de leur production des fiches bibliographiques élaborées par la section de Documentation. Ces fiches guideront les documentalistes d'autres organismes pour une meilleure utilisation de l'information. Cette section sera aussi en charge d'importantes publications qui pourraient être éditées tel un Annuaire des Exportateurs Marocains.

2. LES COMMISSIONS AD HOC

En plus des divisions opérationnelles qui formeront la structure principale du CMPE et en feront un véritable organe d'exécution de la politique de promotion des exportations du Gouvernement, il paraît indispensable d'instituer une autre structure, beaucoup plus souple et qui serait occasionnelle, sous forme de Commissions ad hoc. Celles-ci traiteront des problèmes spécifiques dont la solution demande non seulement des actions du CMPE, mais également l'intervention d'autres administrations, de banques ou d'institutions financières, de producteurs ou exportateurs, donc une concertation à une échelle très large.

Parmi les problèmes qui nécessiteront, éventuellement, cette concertation sur une large échelle figurent notamment les questions de fiscalité et de douane ; la simplification des procédures administratives ; l'approvisionnement en matière première importée pour le compte des industries ou artisans exportateurs ; les nouveaux investissements ou les investissements complémentaires en vue de l'exportation ; les problèmes de financement, d'encouragements ou de stimulants à l'exportation considérés non pas sur un plan général, mais par secteur ou par produit, etc.

Il est évident que ces questions d'importance vitale pour les exportations marocaines ne pourront être résolues ni par les organes directeurs du CMPE ou les divisions opérationnelles, ni par le Ministère du Commerce et de l'Industrie ou d'autres ministères de tutelle, car leur solution exige une intervention coordonnée de différentes administrations centrales, financières ou autres, un ajustement des vues et des politiques avant d'entreprendre les actions requises. C'est pour cela que ce système de concertation a été déjà effleuré dans le Rapport de la Commission interministérielle de 1971 qui suggérait l'institution dans le cadre du Conseil supérieur des exportations d'un système de commissions permanentes traitant de problèmes sectoriels.

Les commissions ad hoc seront constituées et convoquées par le directeur général du CMPE qui invitera à ces concertations tous les intéressés. Sous la supervision du secrétaire général, un secrétariat permanent des commissions ad hoc tiendra à jour les procès-verbaux et les comptes rendus et mettra en forme les recommandations des commissions. Celles-ci seront signées par le directeur général et envoyées aux autorités compétentes habilitées à prendre des décisions en la matière ou à entreprendre les actions qui en découleraient. Les représentants des divisions opérationnelles du CMPE, concernées par les problèmes débattus, siégeront dans les commissions ad hoc à titre de conseillers techniques, leur connaissance des problèmes au niveau de la production ou du marketing ainsi que des conditions prévalant sur les marchés étrangers, seront d'un apport précieux dans les consultations.

3. COORDINATION ET ADMINISTRATION

Le Secrétaire général du CMPE, sous l'autorité du Directeur général, assurera la coordination de tous les travaux et de toutes les actions des divisions opérationnelles, dirigera le secrétariat des commissions ad hoc ainsi que les services administratifs dont le service du personnel, le service du budget et de la comptabilité, le secrétariat et le service du courrier (expédition).

C. LA PHASE DE DEMARRAGE DU CMPE : METHODE DE TRAVAIL

Il est entendu que la structure organisationnelle du CMPE, reflétée par l'organigramme, a été élaborée d'une façon complète et globale, mais que la mise en place des sections susmentionnées devrait être graduelle et faite au fur et à mesure de l'affermissement de ses assises. Les considérations énoncées plus loin dans ce Rapport et qui concernent le personnel et le budget de l'institution dans cette période initiale de ses activités, s'inspireront de cette même approche.

En conséquence, il devrait être procédé de la façon suivante pour que la méthode de travail appliquée dans la phase de démarrage de l'organisation, soit le plus judicieux possible.

- Etablissement des priorités, après consultation de tous les intéressés, par secteur ou par produit, en ce qui concerne les activités opérationnelles ;
- Formation du personnel de l'institution, formation de base ou formation complémentaire, en utilisant toutes les ressources de l'assistance technique internationale ou bilatérale.

Les besoins en formation sont évidents et explicites, mais en ce qui concerne l'établissement des priorités des opérations à entreprendre durant les premières années d'existence du CMPE, il paraît utile de cataloguer ici celles qui, sur la base des consultations menées par le Conseiller principal en promotion commerciale dans les milieux intéressés, semblent d'ores et déjà nécessaires et d'une urgence incontestable :

Division Marketing

- Analyse de divers problèmes de marketing auxquels auront à faire face, sur le plan de la commercialisation extérieure, les producteurs/exportateurs des produits suivants : cuir, vêtements en cuir, chaussures, maroquinerie, produits pharmaceutiques ; ouvrages en liège, bois, papier et carton quelques produits des industries mécaniques et électriques comme robinetterie, appareils électriques à usage domestique, équipement radio, etc.
- Orientations à donner aux investisseurs éventuels dans le domaine industriel, en collaboration avec l'ODI et la Direction de l'Industrie et après consultation des organismes sectoriels et autres instances compétentes.

Division Etudes/Documentation

- Etude de l'offre marocaine à l'exportation concernant les produits dont les disponibilités actuelles et le potentiel futur à l'exportation sont peu ou pas du tout connus : tapis à points noués ; produits de l'artisanat ; huiles essentielles ; produits pharmaceutiques ; papier et carton ; bois ; vêtements en cuir ; chaussures ; divers produits des industries mécaniques et électriques.
- Etudes de marchés extérieurs (recherche de débouchés) : certaines catégories de fils, tissus, habillement et bonneterie ; huiles essentielles ; tapis à points noués ; vêtements en cuir ; équipement radio et autres appareillages électriques, etc.
- Analyse des marchés ; analyse de la position du Maroc sur les marchés du monde arabe et du continent africain ; identification des raisons de succès et des goulots d'étranglement des exportations marocaines sur ces marchés.
- Mise sur pied de la documentation par acquisition, catalogage et traitement des documents, abonnements aux revues et périodiques et leur dépouillement, établissement des fichiers et du service de prêt, mise en circulation des documents, périodiques et autres informations d'ordre commercial dans les différentes divisions et sections du CMPE ; préparation et mise en route d'une publication régulière à l'intention de tous les intéressés en promotion des exportations, établissement des contacts avec les autres centres de documentation du Maroc et dans les principaux marchés des exportations marocaines.

Division Promotion commerciale

- Révision du calendrier des foires et des salons spécialisés auxquels participent les industries et l'artisanat marocains.
- Actions-pilotes ; organisation de la participation d'un secteur industriel ou de l'artisanat à une foire ou un salon spécialisé par an, et collaboration avec les autres organismes dans la participation globale du Maroc à ces manifestations commerciales.
- Organisation d'au moins deux missions commerciales par an à l'étranger et d'autant de missions d'importateurs et d'acheteurs des produits marocains, en déchargeant ainsi de cette tâche la Division du Commerce Extérieur du Ministère du Commerce, de l'Industrie, des Mines et de la Marine Marchande et la Direction de l'Industrie du même Ministère.

Division Formation, Presse et Publications

- Mise sur pied d'au moins deux cours ou stages de formation par an ainsi que de deux colloques ou séminaires.
- Relations avec la presse et préparation des publications selon les besoins découlant des autres activités du CMPE.

D. LE PERSONNEL DU CMPE

Le personnel du CMPE comportera, outre le Directeur général et le Secrétaire général, quatre catégories de cadres et le personnel administratif :

- Les cadres commerciaux, d'une formation et, surtout, d'une large expérience commerciale ;
- Les cadres techniques, de formation d'ingénieur et, éventuellement, avec spécialisation dans une branche industrielle ;
- Les chargés d'études, d'une formation économique ou commerciale ayant quelques expériences dans la recherche et l'analyse ;
- Les documentalistes ou aide-documentalistes dont les premiers doivent posséder une formation universitaire avec spécialisation en technique documentaire et traitement de l'information, tandis que les seconds, avec baccalauréat au moins comme base, pourraient être formés dans le cadre de leur travail au CMPE.

Le personnel administratif comprendra les employés du service du personnel, de la comptabilité, les secrétaires de direction et les secrétaires-dactylos, et le personnel subalterne.

Le nombre total des personnes employées par le CMPE pourrait s'élever à 80 réparties de la façon suivante :

Direction

Le Directeur général et une secrétaire de direction

Le Secrétaire général et une secrétaire de direction

Division Marketing

Chef de division (un cadre commercial) et une secrétaire de direction

Neuf cadres techniques dont

- un ingénieur en textiles
- un ingénieur chimiste, spécialiste engrais
- un ingénieur chimiste, spécialiste pharmacologie
- un ingénieur ou technicien en cuir
- un ingénieur, spécialiste en bois et papier
- un technicien, spécialiste en liège
- un ingénieur mécanicien
- un ingénieur électricien
- un ingénieur, spécialisé en conditionnement et emballage

Sept cadres commerciaux (y compris le chef de division) dont

- un spécialiste dans l'organisation et la gestion
- deux spécialistes en analyse des prix
- un spécialiste de l'économie de transport
- deux spécialistes en conseils industriels (pré-investissement, etc.)

Il sera nécessaire de recourir à la collaboration des ingénieurs et techniciens des secteurs concernés pour accomplir les multiples tâches techniques que doit aborder et résoudre cette Division. Les industries en faveur desquelles une étude ou une action est entreprise seront priées de détacher, auprès du CMPE et pour toute la durée du travail, l'un de leurs cadres techniques qui assistera le responsable de la Division Marketing dans l'exécution de l'étude ou de l'action précitée.

Division Etudes et Documentation

Chef de division (un cadre commercial) et une secrétaire de direction

Dix chargés d'études dont :

- un pour la Section Echanges et bilan des exportations
- deux pour la Section Etudes de l'offre marocaine à l'exportation)
- sept pour la Section Etudes et analyses
- trois pour le Bureau CEE et Europe
- un pour chaque Bureau : Europe de l'Est, Pays arabes et Afrique
- un pour chaque Bureaux : les Amériques et l'Asie/Océanie

Trois documentalistes

Six aide-documentalistes

Pour les questions d'ordre technique, la collaboration avec les cadres des secteurs concernés s'impose dans la même mesure que pour la Division Marketing. Toutefois, cette collaboration prendra généralement la forme de consultations plus ou moins fréquentes. En ce qui concerne les enquêtes effectuées sur les marchés extérieurs dans le cadre d'études de marchés, le détachement permanent d'un responsable commercial des entreprises industrielles ou artisanales sera souhaitable.

Dans la phase de démarrage du CMPE, le travail à accomplir par la Section Etudes/Documentation pour l'élaboration des études de l'offre marocaine à l'exportation, sera considérable. Toutefois, ceci ne nécessitera pas l'attribution à cette section de nombreux chargés d'études, car — comme nous l'avons indiqué plus haut — il sera souhaitable que chaque membre du personnel de l'institution, à quelques exceptions près, en entreprenne une ou participe à l'élaboration d'une telle étude. Vu que ce travail peut être considéré comme la meilleure formation de base pour les nouvelles recrues de l'organisation, celles-ci devraient, au fur et à mesure de leur engagement, s'atteler à cette tâche avant leur intégration définitive dans l'une ou l'autre des divisions ou sections.

Division Promotion Commerciale

Chef de division (un cadre commercial) et une secrétaire de direction

Six cadres commerciaux (y compris le chef de division) dont chacun devrait pouvoir travailler dans chaque section de la division et devraient donc être interchangeables. Il est évident que dans le lancement d'actions de promotion commerciale, le personnel du CMPE en charge de telles tâches opérationnelles ne peut travailler qu'en collaboration étroite avec les responsables des secteurs intéressés et des autorités compétentes dont relèvera l'accomplissement de toutes les opérations de caractère technique.

Division Formation/Presse/Publications

Chef de division (un cadre commercial) et une secrétaire de direction

Quatre cadres commerciaux (y compris le chef de division) qui s'occuperont des programmes de formation

Trois journalistes-rédacteurs pour assurer les relations avec la presse, préparer les communiqués, comptes-rendus, etc. et superviser les publications du CMPE.

Secrétariat des Commissions ad hoc

Deux cadres commerciaux assureront ce secrétariat, sous la supervision du Secrétaire général, et avec l'aide des cadres attachés aux autres divisions du CMPE directement concernés par les questions traitées.

Administration

Deux administrateurs du personnel

Deux comptables

Un employé chargé des fournitures et autres questions matérielles

Six secrétaires de direction (déjà énumérées sous la Direction et les Divisions)

Six secrétaires-dactylos

Dix employés subalternes (courrier, expédition, etc.)

Le personnel indispensable dans la phase de démarrage du CMPE

L'évaluation des effectifs nécessaires au démarrage du CMPE doit tenir compte du fait que dans une première phase de ses activités son budget sera restreint et, en conséquence, le personnel sera limité au minimum indispensable. Suivant l'avis des responsables du Ministère du Commerce, de l'Industrie, des Mines et de la Marine Marchande, on pourrait envisager l'engagement, au début, d'une quinzaine de cadres supérieurs ; ce nombre pourrait être augmenté progressivement.

Le personnel du CMPE pourrait s'élever, dans ce cas-là, à vingt huit personnes réparties comme suit :

Direction

Le Directeur général

Le Secrétaire général

Division Marketing

Quatre cadres commerciaux

Division Etudes et Documentation

Cinq chargés d'études

Un documentaliste/spécialiste de l'information

Deux aide-documentalistes

Division Promotion commerciale

Un cadre commercial

Division Formation/Presse/Publications

Deux cadres commerciaux

Secrétariat des commissions ad hoc

Ce Secrétariat sera assumé par le ou les cadres commerciaux, attachés aux différentes divisions du CMPE, directement concernés par ces problèmes dont la solution nécessitera une concertation et, par conséquent, la convocation d'une commission ad hoc.

Administration

Un administrateur du personnel

Un comptable

Deux secrétaires de direction

Trois secrétaires-dactylos

Trois employés subalternes (courrier, expédition ou autre)

E. LE FINANCEMENT

Le problème le plus difficile à résoudre en vue de la création du CMPE est celui de son financement. Il serait tout à fait naturel que le budget soit assuré par le prélèvement d'une taxe sur les exportations des produits industriels ou artisanaux qui bénéficieront des activités promotionnelles, comme cela se fait dans plusieurs pays. Toutefois, cette solution n'est pas concevable au Maroc, même si la taxe à l'exportation n'était que de deux ou trois pour mille sur le chiffre d'affaires provenant des ventes extérieures, et ce pour des raisons multiples :

— Il n'est pas possible d'imposer les exportations industrielles dans cette phase de développement du pays où l'industrialisation ainsi que la croissance à un rythme soutenu des exportations constituent des priorités impérieuses, publiquement déclarées et défendues par le Gouvernement. Il pourrait paraître aux producteurs et aux exportateurs que les autorités qui, d'une part, leur accordent des avantages appréciables en forme de mesures d'encouragement et de stimulation pour soutenir leurs efforts, les pénalisent, d'autre part, par une taxe, si minime soit-elle.

— Deuxièmement, les exportations des produits industriels et artisanaux de par leur faible volume (moins de 20% des exportations totales) ne pourront pas assurer, même si une taxe leur était imposée, le financement nécessaire au fonctionnement et aux activités du CMPE. Cette imposition pourrait donc avoir un effet de découragement sans obtenir le résultat escompté.

L'imposition des importations des biens d'équipement, de demi-produits, et des biens de consommation d'origine industrielle, comme proposée par le Conseiller en exportation de l'USAID, ne paraît pas non plus faisable ; d'une part pour les raisons évoquées ci-dessus, et, d'autre part, à cause des objections et des résistances qu'une telle mesure serait susceptible de provoquer.

Le financement du CMPE devrait donc être assuré, pendant ses premières années d'existence, par les subventions ou dotations de l'Etat.

La plus importante source autonome de financement serait cependant la rémunération des prestations du CMPE par les producteurs/exportateurs qui en bénéficient. Dès que la nouvelle organisation a démontré ses compétences et a fait preuve de sa capacité de rendre service aux organismes et entreprises d'exportation, des relations contractuelles pourront s'établir entre lui et ceux qui sont demandeurs de ses prestations. A partir de ce moment, le CMPE pourra travailler comme un bureau d'étude ou de consultation. Il est à souligner que même en adoptant cette approche le CMPE, organisme public, ne fera pas de bénéfices, mais sera seulement rémunéré pour le coût réel de ses opérations (traitement du personnel, dépenses de déplacement et de voyages, et frais généraux).

F. LE BUDGET PREVISIONNEL DE FONCTIONNEMENT

Sur la base des données (grille des salaires pour différentes catégories de cadres et de fonctionnaires, etc..) fournies par les responsables du Ministère du Commerce, de l'Industrie, des Mines et de la Marine Marchande, deux variantes du budget prévisionnel de fonctionnement du CMPE sont présentées ci-après. L'une, complète, qui correspond à la prévision du personnel au moment où le CMPE aura atteint son âge mûr ; l'autre, restreinte, qui pourrait être appliquée dans la phase de démarrage de l'institution.

Le budget prévisionnel ne contiendra pas de poste de loyer du bâtiment ou des locaux occupés par le CMPE, supposant que le Gouvernement mettra gratuitement à la disposition de la nouvelle institution, pendant la phase de son démarrage, l'espace nécessaire à son fonctionnement.

Budget prévisionnel de fonctionnement du CMPE

VARIANTE I

		<u>Dépense annuelle (en DH)</u>	<u>Total (en DH)</u>
10.	<u>PERSONNEL PERMANENT</u>		
01	<u>Direction</u>		
	11 Directeur général	144'000	
	12 Secrétaire général	84'000	
	13 Chefs de Division (4)	288'000	
02	<u>Cadres commerciaux</u>		
	21 Cadres commerciaux supérieurs (généralistes-marketing) (8)	480'000	
	22 Cadres commerciaux—spécialistes (8)	384'000	
03	<u>Cadres techniques</u>		
	31 Ingénieurs—spécialistes (8)	288'000	
	32 Techniciens—spécialistes (3)	108'000	
04	<u>Chargés d'études</u> (10)	360'000	
05	<u>Documentalistes</u>		
	51 Documentalistes—spécialistes (3)	126'000	
	52 Aide-documentalistes (6)	86'000	
06	<u>Journalistes—rédacteurs</u> (3)	108'000	
07	<u>Personnel administratif</u>		
	71 Chef du personnel et Chef-comptable (2)	84'000	
	72 Employés administratifs (3)	28'800	
08	<u>Secrétariat</u>		
	81 Secrétaires de direction (6)	108'000	
	82 Secrétaires—dactylos (6)	57'600	
09	Employés subalternes (10)	54'000	
10	99 Sous-total		<u>2'788'400</u>

20.		<u>PERSONNEL OCCASIONNEL</u>	
	01	Consultants/spécialistes nationaux (honoraires, frais de déplacement)	60'000
	02	Consultants/spécialistes internationaux (honoraires, frais de déplacement)	215'000
	03	Conférenciers nationaux pour la formation (honoraires, frais de déplacement)	60'000
	04	Conférenciers internationaux pour la formation (honoraires, frais de déplacement)	107'500
20	99	Sous-total	<u>442'500</u>
30.		<u>DEPLACEMENTS</u> (opérations et programmes de formation, personnel du CMPE)	
	01	A l'étranger	129'000
	02	Au Maroc	50'000
30	99	Sous-total	<u>179'000</u>
40.		<u>EQUIPEMENT</u>	
	01	Documentation étrangère	55'000
	02	Documentation nationale	10'000
	03	Fournitures de bureau	5'000
	04	Matériel : machines de bureau, etc.	100'000
40	99	Sous-total	<u>170'000</u>
50.		<u>DIVERS</u>	
	01	Frais d'entretien de l'équipement	20'000
	02	Frais de publication	40'000
	03	Frais divers (téléphone, timbres, etc.)	12'000
	04	Frais imprévus (assurance, etc.)	108'100
50	99	Sous-total	<u>180'000</u>
99.		<u>GRAND TOTAL</u>	<u>3'760'000</u>

Budget prévisionnel de fonctionnement du CMPE en phase de démarrage

VARIANTE II

			<u>Dépense annuelle (en DH)</u>	<u>Total (en DH)</u>
10.		<u>PERSONNEL PERMANENT</u>		
	01	Directeur général	144'000	
	02	Secrétaire général	84'000	
	03	Cadres commerciaux (7)	336'000	
	04	Chargés d'études (5)	180'000	
	05	Documentaliste / spécialiste de l'information	42'000	
	06	Aide-documentalistes (2)	28'800	
	71	Administrateur et comptable (2)	84'000	
	08	Secrétaires de direction (2)	36'000	
	09	Dactylos, employés de bureau et employés subalternes (9)	73'800	
10	99	Sous-total		<u>1'086'000</u>
20.		<u>PERSONNEL OCCASIONNEL</u>		
	01	Consultants/spécialistes nationaux (honoraires, frais de déplacement)	60'000	
	02	Consultants/spécialistes internationaux (honoraires, frais de déplacement)	215'000	
	03	Conférenciers nationaux pour la formation (honoraires, frais de déplacement)	60'000	
	04	Conférenciers internationaux pour la formation (honoraires, frais de déplacement)	107'500	
20	99	Sous-total		<u>442'500</u>
30.		<u>DEPLACEMENTS</u> (opérations et programmes de formation, personnel du CMPE)		
	01	A l'étranger	129'000	

	02	Au Maroc	50'000	
30	99	Sous-total		<u>179'000</u>
40.		<u>EQUIPEMENT</u>		
	01	Documentation étrangère	53'750	
	02	Documentation nationale	10'000	
	03	Fournitures de bureau	5'000	
	04	Equipement matériel : machines de bureau, etc.	60'000	
40	99	Sous-total		<u>128'750</u>
50.		<u>DIVERS</u>		
	01	Frais d'entretien de l'équipement	12'000	
	02	Frais de publication	40'000	
	03	Frais divers (téléphone, timbres, etc.)	12'000	
	04	Frais imprévus (assurance, etc.)	32'000	
50	99	Sous-total		<u>146'000</u>
99.		<u>GRAND TOTAL</u>		2'200'000

Remarques

La grille de salaire indiquée par les responsables du Ministère est la suivante :

Directeur général :	8–12'000 DH par mois
Secrétaire général :	5–7'000 DH par mois
Cadres commerciaux :	4'000 DH par mois
Chargés d'études :	3'000 DH par mois
Documentaliste/spécialiste de l'information :	3'500 DH par mois
Aide-documentalistes :	1–1'200 DH par mois
Administrateur, comptable :	3'500 DH par mois
Secrétaires de Direction :	1–1'500 DH par mois
Dactylos et employés de bureau :	7–800 DH par mois
Employés subalternes (hommes de peine) :	450 DH par mois

Dans le calcul des salaires figurant au budget ci-dessus, le niveau supérieur a été pris en considération pour les postes où un minimum et un maximum sont indiqués.

G. PROJET DE TEXTE DU DAHIR PORTANT LOI, RELATIF AU CENTRE MAROCAIN DE PROMOTION DES EXPORTATIONS (CMPE)

EXPOSE DES MOTIFS

Dans la phase actuelle du développement de l'économie, l'industrialisation accélérée est une nécessité impérieuse. Cet objectif est explicitement fixé par le Deuxième plan de développement économique et social 1973–1977 qui préconise la réalisation des objectifs par l'établissement de nouvelles industries, l'extension des industries existantes et la pleine utilisation des capacités de production actuelles. L'industrialisation jouera non seulement un rôle capital en vue d'assurer à l'économie nationale un taux de croissance maximale, mais contribuera également à la répartition plus équitable des fruits de cette expansion entre les différentes couches sociales et les diverses régions du pays.

Il est cependant évident que cet objectif ne pourrait être atteint si la politique d'industrialisation n'était accompagnée des efforts visant à la promotion des exportations des produits manufacturés afin d'assurer aux industries naissantes ou grandissantes des débouchés extérieurs qui leur permettront de produire à un niveau de rentabilité optimal. En même temps, le secteur industriel pourra accroître, dans une large mesure, les recettes en devises de l'économie et contribuer d'une façon considérable à l'amélioration constante de la balance des paiements.

Le développement des activités de l'artisanat autant que de ses exportations constitue également un objectif prioritaire.

La promotion des exportations industrielles et artisanales pose des problèmes complexes et peu connus. Dès lors, une recherche systématique des débouchés et la diversification de ces derniers, une information régulière et complète sur ces mêmes marchés et leurs conditions d'accès ainsi que l'élaboration d'une stratégie de marketing au niveau national facilitant l'adaptation des produits exportables aux besoins des utilisateurs et consommateurs étrangers, est nécessaire.

Il est indispensable, en conséquence, de créer un organisme public spécialisé dans le domaine de la promotion des exportations qui orientera les investissements en fonction de la demande extérieure, assistera les exportateurs par des études et par des opérations en vue de développer leurs ventes à l'étranger, initiera et coordonnera l'information commerciale et se chargera de la formation des cadres. Cette institution sera ainsi le pivot d'un système intégré de promotion des exportations travaillant en collaboration étroite avec les organismes existants s'occupant de la promotion des exportations d'autres produits.

ARTICLE 1^{er}

Il est institué sous la dénomination du Centre marocain de promotion des exportations, par abréviation « CMPE », un établissement public doté de la personnalité civile et de l'autonomie financière, et placé sous la tutelle du Ministère du Commerce, de l'industrie, des Mines et de la Marine marchande.

ARTICLE 2

Le Centre marocain de promotion des exportations est chargé de promouvoir les exportations de tous les produits d'origine industrielle et artisanale ainsi que de ceux d'origine agricole ou agro-industrielle qui ne relèvent pas de la compétence de l'Office de commercialisation et d'exportation.

Le Centre est ainsi habilité à

- Organiser un système d'information commerciale à l'échelle nationale, en particulier par une collaboration étroite avec les représentants économiques et commerciaux en poste à l'étranger ;
- Effectuer des études de potentiel des produits exportables et des études des marchés extérieurs ; assister les exportateurs dans leurs efforts de marketing à l'étranger ; entreprendre des actions promotionnelles afin de faire connaître les produits exportés sur les marchés mondiaux ;
- Assister les autorités et les institutions responsables dans la mise en oeuvre des mesures d'encouragement à l'exportation, du système de crédit et de l'assurance-crédit à l'exportation, de la simplification et de la standardisation de la documentation et de la procédure à l'exportation ;
- Orienter les investisseurs publics ou privés vers des industries ou des activités dont la production pourrait être facilement écoulee sur les marchés extérieurs et dans les meilleures conditions possibles ;
- Formuler et organiser des programmes de formation pour les cadres commerciaux ainsi que de mettre sur pied des manifestations susceptibles de sensibiliser l'opinion publique, en général, ou l'ensemble des opérateurs d'un secteur ou d'une branche de l'économie, en particulier, aux problèmes et aux impératifs de l'exportation.

ARTICLE 3

Le Centre marocain de promotion des exportations est administré par un conseil composé des membres suivants :

- Le Ministre chargé du Commerce, Président
- Le Ministre des Affaires étrangères ou son représentant
- Le Ministre chargé des finances ou son représentant
- Le Ministre de l'agriculture et de la réforme agraire ou son représentant
- L'autorité chargée du Plan et du développement régional auprès du premier Ministre ou son représentant
- Le Directeur du Commerce extérieur
- Le Directeur de l'industrie
- Le Directeur de l'artisanat
- Le Directeur de la Marine marchande
- Le Directeur général de l'Office de développement industriel

- Le Directeur général de l'Office de commercialisation et d'exportation
- Le Directeur général du Bureau des recherches et des participations minières
- Le Directeur général de l'Office chérifien des phosphates
- Le Directeur général du Centre marocain de promotion des exportations, rapporteur
- Un représentant de la Fédération des Chambres de commerce et de l'industrie
- Un représentant de la Fédération des Chambres artisanales
- Un représentant des producteurs de textiles
- Deux représentants des producteurs du cuir dont un représentant des secteurs de l'habillement ou de la chaussure
- Deux représentants des producteurs des industries mécaniques et électriques
- Deux représentants des producteurs des industries chimiques, pharmaceutiques et huiles essentielles
- Deux représentants des producteurs des secteurs du bois, du liège et des matériaux de construction
- Un représentant des producteurs de pâte à papier et carton.

Chacun des représentants des producteurs est désigné par l'organisation la plus représentative de la profession ou, en l'absence d'une telle organisation, par le Ministre chargé du commerce et le Ministre de tutelle du secteur concerné.

La liste des organisations les plus représentatives des professions intéressées est fixée par arrêté conjoint du Ministre chargé du commerce et du Ministre de tutelle du secteur concerné.

Le Président peut convoquer à titre consultatif toutes personnes qualifiées.

Le Conseil d'administration se réunit sur convocation de son Président, aussi souvent que les besoins du Centre l'exigent et au moins deux fois par an dont une fois avant le 30 juin pour arrêter les comptes de l'exercice écoulé, et une fois avant le 31 décembre pour examiner et arrêter le budget du Centre et le programme prévisionnel des opérations de l'exercice suivant. Il peut également être réuni à la demande des deux tiers des membres composant le Conseil.

Le Conseil d'administration délibère à la majorité des membres présents dont le nombre ne peut être inférieur à 18. En cas de partage, des voix celle du Président est prépondérante.

ARTICLE 4

Le Conseil d'administration dispose de tous les pouvoirs nécessaires à la bonne administration du Centre.

A cet effet, il délibère sur les questions d'intérêt général relatives à la promotion des exportations, il arrête le programme de travail du Centre, examine et arrête le budget, approuve les comptes, et examine les résultats du programme d'action et de formation.

ARTICLE 5

Il est institué auprès du Centré, à titre consultatif, une structure de concertation sous forme de commissions ad hoc. Ces commissions sont composées des représentants des administrations centrales, des organismes publics intéressés, des institutions financières, des producteurs et des exportateurs.

Ces commissions ad hoc sont convoquées en séance par le Directeur général du Centre à chaque occasion que les impératifs du développement des exportations d'un produit ou d'un groupe de produits le nécessitent.

ARTICLE 6

Le Centre marocain de promotion des exportations est géré par un Directeur général nommé par décret royal et assisté d'un Secrétaire général nommé par le Conseil d'administration. Le Directeur général assure la gestion du Centre suivant les directives générales données par le Conseil d'administration, Il représente le Centre vis-à-vis de l'Etat, de toute administration publique ou privée et de tout tiers, et fait tous actes conservatoires.

Il exerce les actions judiciaires, assure la gestion de l'ensemble des services du Centre et nomme le personnel. Il est habilité pour engager des dépenses par acte, contrat ou marché. Il fait tenir la comptabilité des dépenses engagées liquide et constate les dépenses et recettes du Centre. Il délivre à l'agent comptable les ordres de paiement et les titres de recettes correspondantes.

Il peut, sous sa responsabilité, déléguer une partie de ses pouvoirs et de ses attributions au personnel de direction.

ARTICLE 7

Le budget du Centre marocain des exportations comprend :

1/ En recettes

- Le produit des taxes perçues au profit du Centre marocain de promotion des exportations ;
- Les subventions et dotations de l'Etat et des organismes dépendant de lui ;
- Les avances diverses ;
- Le produit de la rémunération de ses prestations rendues, sur une base contractuelle, aux producteurs, exportateurs, organismes et autres institutions, couvrant le coût réel de ses opérations sans comprendre, toutefois, un bénéfice proprement dit ;
- Toutes autres recettes qui peuvent être prévues ultérieurement.

Un arrêté conjoint du Ministre du commerce et du Ministre des finances, fixera la dotation financière initiale accordée par l'Etat au Centre marocain de promotion des exportations.

2/ En dépenses

- Les frais de fonctionnement du Centre marocain de promotion des exportations ;

- L'amortissement des avances diverses ;
- Toutes autres dépenses qui peuvent être prévues ultérieurement.

Il peut contracter des emprunts après autorisation du Ministre chargé des finances. Ces emprunts pourront bénéficier de la garantie de l'Etat.

ARTICLE 8

Le Centre tient ses écritures et effectue ses opérations de recettes et de paiements suivant les lois et usages de commerce.

ARTICLE 9

Le Ministre du commerce est chargé de l'application du présent décret royal.

H. SUGGESTIONS CONCERNANT L'ASSISTANCE TECHNIQUE NECESSAIRE

Le Centre marocain de Promotion des Exportations (CMPE) aurait besoin durant les trois à quatre premières années de son existence d'une assistance technique intégrée dans les domaines de la formation des cadres, des consultations spécifiques ainsi que dans la réalisation des opérations pilotes telles que des projets de développement des marchés. Il est évident qu'il sera indispensable que quelques experts résident au Maroc durant la période d'assistance technique afin de contribuer à la mise sur pied de l'organisation, au lancement de ses activités et assurer la formation en cours d'emploi du personnel affecté au CMPE.

Objectif à long terme

L'objectif à long terme du projet serait d'aider le Gouvernement à réaliser sa politique de développement des exportations.

Objectifs immédiats

Le projet aura pour but d'assister les autorités marocaines compétentes dans l'établissement de l'organisme chargé de la promotion des exportations et le lancement de ses activités ainsi que dans la formation de ses cadres.

Activités

1. Dans le domaine institutionnel : mise en place des structures du CMPE et élaboration de son programme de travail. Assistance en vue de systématiser le rassemblement, le traitement et la diffusion de l'information commerciale. Assistance en vue de simplifier et de standardiser la documentation et les procédures d'exportation ainsi que dans la mise en application du système d'assurance-crédit à l'exportation. .

2. Dans le domaine de marketing : études des potentiels d'exportation et élaboration des projets pilotes de développement de marchés. Assistance aux producteurs/exportateurs concernant certains secteurs spécifiques tels que le conditionnement et l'emballage, le calcul des coûts et des prix à l'exportation, la promotion commerciale (foires et salons spécialisés, etc.).

3. Dans le domaine de la formation : les activités de formation viseront à provoquer une prise de conscience des problèmes et des impératifs de l'exportation, à doter les responsables des exportations d'un langage commun relatif au marketing international, à rehausser le niveau des compétences professionnelles et à former des instructeurs aux techniques du marketing à l'exportation.

4. Dans le domaine de la documentation et de l'équipement : constituer une unité de documentation comprenant (i) des publications générales et spécialisées dans le marketing à l'exportation et la promotion commerciale ; (ii) statistiques et documentations de référence. L'équipement à fournir consisterait en matériel nécessaire à l'exécution du projet comme les machines de bureau et le matériel de formation audio-visuel.

Personnel international et prévision budgétaire

Experts

— Chef de projet/Conseiller principal en promotion commerciale et organisation	36 mois	
— Expert en information commerciale et documentation	24 mois	
— Expert en marketing à l'exportation	30 mois	
		225'000 \$EU

Consultants

— Développement de marchés (6 projets pilotes)	20 mois	
— Marketing spécifique	18 mois	
— Développement commercial	12 mois	
		125'000 \$EU

Formation

— Colloques, cours, séminaires, etc.	24 mois	
		60'000 \$EU
— Formation de groupes	100'000\$EU	
	Total	160'000\$EU

Documentation 20'000\$EU

Equipement 20'000\$EU

En conséquence, le budget prévu pour le projet d'assistance technique s'élèverait à environ 600'000 dollars des Etats-Unis pour une période de trois ans.

**Programme national du développement
du secteur commercial et de la promotion du commerce extérieur
au Cambodge**

par

Dr Victor Segesvary
Conseiller principal en promotion commerciale/Consultant

Février 1994

INTRODUCTION

Le commerce extérieur jouera un rôle crucial dans le programme de réhabilitation et de reconstruction du pays. La promotion des échanges avec le monde contribuera non seulement à l'équilibre des finances extérieurs ; elle sera aussi créateur d'emplois car elle renforcera les activités productrices dans tous les secteurs impliqués dans les échanges internationaux ; répercutera sur le marché domestique les effets de retour accompagnant les échanges comme, par exemple, l'amélioration de la qualité ou l'assortiment plus varié des marchandises dont bénéficieront également les consommateurs nationaux.

Une action vigoureuse en faveur du secteur commercial et, en particulier, en faveur du secteur du commerce extérieur est d'autant plus urgente que les exportations cambodgiennes sont tombées à un niveau très bas, tandis que les importations se sont fortement accrues depuis 1992. Ainsi, la balance des paiements s'est détériorée d'une façon vertigineuse – tandis qu'en 1991 la proportion des importations par rapport aux exportations était de 3 à 1, en 1992 cette proportion est tombée à 5 à 1, en 1993 à 8 à 1, et en 1994 elle peut atteindre l'écart de 10 à 1. Donc, le pays importe dix fois de plus qu'il n'exporte si l'on ne tient pas compte de réexportation (autour de 200 millions de dollars EU par an au cours de deux dernières années) ; car, en effet, le Cambodge est devenu une plaque tournante pour le commerce entre le Vietnam et les autres pays de la région en raison de ces droits de douane peu élevés et la faiblesse des contrôles sur les points d'entrée et de sortie. Le déficit de la balance commerciale, toujours sans compter les réexportations, a atteint, selon les estimations, 178,5 millions de dollars EU en 1993 (9,3% du PIB, tandis que le déficit de la balance courante était 7,7% du PIB), et peut dépasser les 200 millions de dollars EU en 1994.

La structure des exportations est totalement déséquilibrée, le caoutchouc et le bois grume ayant représenté, à eux seuls, plus que 90% des exportations totales. Ce déséquilibre reflète, naturellement, la structure du PIB dont le riz et le caoutchouc représente autour de 30%, les produits d'origine animale 13 à 15%, les produits de la pêche environ 4-5%, la manufacture et la construction 14-15%, et, finalement, les services 33 à 35%, y compris le commerce de gros et de détail qui représentent ensemble 13-14%.

Les importations se sont composées, au cours de la période quand le pays entretenait avec l'Union Soviétique des relations privilégiées, des matières premières et des biens d'équipement (des machines, des véhicules lourds, du pétrole, du fuel, et des produits en coton et autres matériaux) ; les produits de consommation ont été importés de la Chine, principalement des produits bon marché pour les ménages ainsi qu'autres marchandises simples de consommation. Ce tableau a totalement changé depuis 3 ans, période caractérisée par une croissance énorme des importations d'équipements de transport (véhicules de tourisme, etc.), et d'autres produits durables destinés à la consommation comme téléviseurs, appareils de photographie et des conditionneurs d'air, etc. Ces importations ont été presque exclusivement financées par l'UNTAC et l'influx des capitaux provenant des bailleurs de fonds.

PREMIER CHAPITRE

Aspects de politique commerciale

Vu la grande importance du développement du secteur commercial et l'absolue nécessité de promouvoir les exportations et de rationaliser les importations, le Gouvernement Royal élaborera dans l'avenir très proche un cadre compréhensif et conceptuellement bien fondé d'une politique commerciale. Ce document mettra en évidence toutes les grandes lignes d'orientation et de re-structuration du secteur commercial en sa totalité ainsi que celles du développement des échanges internationaux du Cambodge afin de donner une transparence à sa politique future dans ce domaine et d'assurer les partenaires commerciaux du pays (autant que les investisseurs nationaux et étrangers) de la liberté totale dans les transactions sur le marché intérieur et avec l'étranger, dans le cadre des *règles de jeu* fixées d'avance. Le cadre juridique des activités commerciales sera fixé par des textes législatifs, en particulier concernant le commerce extérieur et les transactions sur le marché intérieur.

Ce document revêtira d'autant plus d'importance que le pays est à présent dans une phase de réhabilitation et de reconstruction, et qu'il sera nécessaire d'adapter le rythme de développement des échanges avec le monde extérieur, donc la promotion des exportations et la rationalisation des importations, au progrès réalisés par les efforts de réhabilitation et de reconstruction. Ceci signifie que l'ouverture du marché aux produits étrangers devra se faire graduellement au fur et à mesure que par l'expansion des forces productives l'économie cambodgienne pourra pleinement bénéficier des possibilités d'ouverture vers les marchés extérieurs. Cette ouverture comprendra également la création des zones francs.

Ceci n'exclue pas, loin de là, que le Cambodge ne cherche pas d'entrer dans toutes les organisations régionales et internationales qui constituent le cadre de la coopération économique dans la sous-région et dans le monde. Ainsi, le Royaume entrera comme membre à part entière dans de telles organisations comme le GATT (Accord Général sur les Tarifs et le Commerce) et s'efforcera d'obtenir les bénéfices découlant de la clause de la nation la plus favorisée (MFN) ou du Système Généralisé des Préférences (GSP) de ses partenaires industrialisés.

Mais le Gouvernement du Royaume reconnaît que la participation du pays dans les accords commerciaux ou de coopération économique qui sont fondés sur la réciprocité des engagements des parties contractantes, devrait se faire au rythme du développement des forces productrices de la nation dans les différents secteurs de l'économie pour que les opérateurs étrangers ne prennent pas le dessus sur les nationaux dans l'arène compétitif d'une économie de marché. Ceci n'est pas du tout une expression de volonté du nationalisme économique, tant maudit de nos jours, mais tout simplement une mesure de précaution pendant la phase de réhabilitation et de la reconstruction du pays et, surtout, pendant la difficile période de l'ajustement aux exigences innombrables — psychologique, humaine, sociale, économique ou, même, physique — de la concurrence dans le cadre d'un marché certes

réglementé, mais, néanmoins, représentant un cadre totalement nouveau pour une population qui n'a jamais vécu dans de pareilles conditions. L'argument présenté ici est similaire à celui par lequel on défend généralement la protection des industries naissantes — une protection admise même par les plus vaillants défenseurs de l'économie de marché.

DEUXIEME CHAPITRE

L'aspect institutionnel

En parlant de la promotion du secteur commercial, il est entendu que ce terme implique, tout d'abord, le *renforcement des institutions centrales* en charge d'organiser et de réglementer la structure et le fonctionnement du marché intérieur ainsi que développer les échanges internationaux telles la Direction Générale du Ministère, la Direction du Commerce Extérieur et celle du Commerce Intérieur. Les opérations du commerce extérieur et du commerce intérieur sont inextricablement liées et complémentaires sur de nombreux points, ainsi pour promouvoir le premier il faut aussi intervenir dans le domaine de la seconde.

Le renforcement des organes centraux de la gestion et de l'orientation du commerce extérieur et intérieur – organes qui préparent les textes législatifs et réglementaires et proposent au Gouvernement des mesures indirectes pour influencer les échanges dans le sens de la stratégie adoptée par le Gouvernement Royal et correspondant aux besoins de l'économie nationale – sera la première étape du renouveau institutionnel ainsi que du secteur commercial. A ce propos, une assistance technique du PNUD, complétée par des interventions et des financements provenant d'autres bailleurs de fonds, est prévue pour une durée de deux ans.

Actuellement, l'organisation de la Direction Générale et des deux Directions concernées du Ministère du Commerce, qui seront l'objet des mesures de renforcement par l'assistance internationale, est la suivante (selon des textes qui pour le moment ne sont pas encore entrés en vigueur) :

La DIRECTION GENERALE coiffera toutes les directions du Ministère. Il sera en particulier responsable pour la préparation des textes législatifs et réglementaires d'une portée nationale et des contrats internationaux (*Bureau législatif et réglementaire*) ; pour les relations avec les institutions internationales (*Bureau des relations avec les institutions internationales*), et pour les actions de marketing, donc la promotion des exportations et la rationalisation des importations (*Bureau de marketing*) ; cette dernière tâche relèvera du CAMBPROM après sa création. Un *Service administratif* sera attaché à la Direction Générale pour assurer le bon fonctionnement des différentes divisions du Ministère.

La DIRECTION DU COMMERCE EXTERIEUR est composée des bureaux énumérés ci-dessous et dont l'attribution des tâches est indiquée également :

1/ Le *Bureau des Importations* délivrera les licences d'importations pour les produits soumis temporairement au contrôle du Ministère ; établira des statistiques d'importation et la liste des produits importés (avec toutes les spécifications nécessaires) ; surveillera l'évolution des productions nationales afin d'adapter les importations aux besoins nationaux dans des domaines où la capacité de production domestique ne suffit pas ; veillera que les activités des sociétés étrangères établies au Cambodge soient conformes aux lois et règlements promulgués ;

2/ Le *Bureau des Exportations* délivrera les licences d'exportation pour les produits dont les ventes à l'étranger sont temporairement surveillées ; établira des statistiques d'exportation ; finalement, il suivra les activités des sociétés qui ont investi au Cambodge et ont bénéficié des privilèges à ce titre.

3/ Le *Bureau de Programmation* entreprendra toutes les recherches indispensables au travail des autres Bureaux ; suivra régulièrement les évolutions des prix ; et, sur la base de ces travaux, donnera son préavis (autorisation préalable) concernant la délivrance des licences d'importation ou d'exportation.

4/ Le *Bureau des Relations Extérieures* accomplira toutes les fonctions qui font habituellement partie du cahier de charge d'un tel Bureau. Il est en charge de la coopération économique avec les pays étrangers (protocoles, foires et expositions, etc.), et s'occupera également des marques de fabrication, des brevets et copy right, etc. dont l'enregistrement et le traitement seront, probablement, transférés au Ministre de l'Industrie après décision du Conseil des Ministres.

La DIRECTION DU COMMERCE INTERIEUR est constituée de six bureaux, notamment :

1/ Le *Bureau de Législation et de l'Enregistrement*, qui non seulement prépare les textes législatifs et réglementaires, mais effectuera l'enregistrement de toutes entités exerçant une activité commerciale ;

2/ Le *Bureau de l'Approvisionnement des Marchés* lequel, en vertu de l'article 62 de la Constitution, veille sur l'approvisionnement des marchés en matières premières et autres produits essentiels pour le fonctionnement de l'économie et assure que les intérêts des producteurs nationaux soient sauvegardés ; en ce sens, il définit le volume des importations nécessaires pour satisfaire la consommation nationale sans, toutefois, porter atteinte aux intérêts légitimes des producteurs nationaux ;

3/ Le *Bureau de la Protection des Consommateurs* lequel, en vertu de l'article 63 de la Constitution, surveille les opérations effectuées sur les marchés de gros et de détail pour que les intérêts des consommateurs soient respectés et que le niveau de vie de la population ne souffre pas de la fluctuation des prix, du manque de l'approvisionnement, et d'autres facteurs exerçant une influence sur les opérations commerciales.

4/ Le *Bureau des Prix et de la Concurrence Déloyale* est certainement l'un des plus importants du Ministère ; il conduira toutes les enquêtes sur les prix à différents niveaux, procèdera au relèvement des mouvements des prix sur les marchés ainsi que chez les grossistes et les détaillants ; en plus, le Bureau aura le rôle d'une grande importance de veiller à l'application des lois et des règlements – les règles de jeu – définissant le cadre de la concurrence à une époque difficile d'adaptation aux conditions d'une économie de marché ;

5/ Le *Bureau de la Programmation et des Statistiques* traitant uniquement des statistiques et des prévisions en ce qui concerne les échanges sur le marché domestique ;

6/ Le *Bureau des Délégués dans les Provinces*, en voie de constitution, veillera que les activités des délégations du Ministère dans les provinces soient conformes aux lignes d'orientation reçues du Bureau du commerce intérieur et assurera la coordination des activités dans les différentes régions du pays. Il constituera une sorte de 'clearing house' des informations et des opérations commerciales, en facilitant l'équilibrage entre les besoins localisés et les disponibilités existant dans d'autres parties du pays où il existe un surplus.

Au renforcement des organes centraux doit s'ajouter également le renouveau total des délégations du Ministère du Commerce dans les différentes provinces du Cambodge, ainsi que la détermination de leur statut et de leur tâches respectives, ensemble avec la formation de leur personnel et la provision des équipements nécessaires pour eux. Ces offices provinciaux seront inclus dans le programme d'assistance technique prévu.

Cet effort de renforcement touchera aussi la DIRECTION DU CONTROLE DE LA QUALITE (CAMCONTROL) qui doit assumer la responsabilité de surveiller les marchés et les réseaux de distribution en vue du respect des normes promulguées par le Gouvernement ou établies par les associations professionnelles. Cette Direction aura donc besoin d'une assistance substantielle pour pouvoir remplir son rôle de contrôleur des réseaux de distribution ; elle doit être insérée dans le vaste programme intégré d'assistance technique que l'ONUDI va formuler au cours d'une mission de programmation dans les mois à venir. Cette mission couvrira tous les aspects du domaine de normalisation et du contrôle de la qualité, de l'établissement des normes conformes à la normalisation internationale jusqu'à la formation des personnels dans leur spécialité respective.

UNE DEUXIEME ETAPE CONSISTERA EN LA CREATION DE NOUVELLES INSTITUTIONS dont

1/ La CHAMBRE DE COMMERCE (un texte législatif prévoyant la reconstitution de cet organisme est déjà en préparation à la Présidence du Conseil) ;

2/ Les ASSOCIATIONS PROFESSIONNELLES DES PRODUCTEURS EXPORTATEURS, par produits ou groupes de produits (par exemple, produits de la pêche), qui joueront un rôle important dans la relance des exportations. Elles auront comme tâche principale : (i) De veiller que les spécifications, normes, qualité ou autres caractéristiques requis par les marchés étrangers soient respectés ; (ii) De contribuer à résoudre les problèmes pratiques qui se posent aux petits producteurs sur le plan d'exportation tels le groupage des cargaisons et leur acheminement vers les ateliers provinciaux de transformation ; (iii) De canaliser vers les producteurs exportateurs toutes les informations provenant du Ministère ou des organismes de promotion et de coordination ; (iv) D'intervenir dans l'attribution des crédits bancaires en faveur des petits producteurs et exportateurs et, éventuellement, de les aider de préparer leur dossier de soumission aux institutions bancaires et de se porter garants pour les crédits obtenus par ces mêmes producteurs exportateurs ; (v) De conseiller les organismes centraux et provinciaux dans l'établissement des systèmes d'encouragement en vue de la production des marchandises exportables ou pour faciliter des procédures d'exportation.

3/ La création, à moyen terme, du CENTRE CAMBODGIEN DU DEVELOPPEMENT ET DU COMMERCE EXTERIEUR (CAMBPROM). Cette institution spécialisée dans la solution des problèmes pratiques et opérationnels du commerce extérieur sera constitué comme un organisme autonome, gouverné par un Conseil d'Administration composé des ministres concernés (Plan, Finance, Agriculture, Industrie, etc.) sous la présidence du Ministre du Commerce. L'autonomie du CAMBPROM signifie qu'il ne fera pas partie de la fonction publique afin de (i) Simplifier et accélérer le processus de décision en comparaison aux habitudes des administrations de l'Etat ; et (ii) Permettre la rémunération des fonctionnaires – spécialistes dans leurs domaines respectifs – indépendamment de l'échelle des salaires de la fonction publique mais comparables aux rémunérations payées par les entreprises cambodgiennes ou les entreprises étrangères établies au Cambodge. Le CAMBPROM doit parvenir, après une période initiale de quelques années, à assurer l'autofinancement de ses activités en demandant le remboursement de tous ces frais des utilisateurs de ses services, tout en restant une institution à but non lucratif. Pendant la période initiale, CAMBPROM devrait bénéficier d'un programme d'assistance technique intégré comprenant des conseillers résidents, des consultations spécialisées d'une courte durée, toute sorte de programmes de formation, de la mise en place d'un centre d'information commerciale en son sein, et de la fourniture d'équipements.

4/ La constitution d'un FONDS DE GARANTIE, éventuellement avec la contribution, au moins en partie, des bailleurs de fonds bilatéraux et multilatéraux, afin de faciliter l'obtention des crédits par les petits producteurs et exportateurs et les petites et moyennes entreprises qui auront des activités significatives ou du point de vue de la satisfaction du marché intérieur en produits de première nécessité, ou du point de vue de la satisfaction de la demande identifiée sur un ou plusieurs marchés étrangers susceptibles d'absorber les exportations cambodgiennes. Ce Fonds pourrait être géré par la Banque du Commerce Extérieur ou par n'importe quel autre organisme financier à but non lucratif.

5/ La création, à moyen terme, d'un CENTRE CAMBODGIEN DE L'ARTISANAT TRADITIONNEL ET MODERNE (CAMBART) qui sera l'organe du même type que le CAMBPROM, autonome et en charge de promouvoir la production de l'artisanat ainsi que la promotion de ventes des produits artisanaux et sur le marché intérieur, y compris le marché touristique, et sur les marchés d'exportation.

TROISIEME CHAPITRE

L'aspect législatif et réglementaire

Il est naturel que la transition d'une économie dirigée à une économie de marché rend impératif que tous les instruments juridiques – législatifs ou réglementaires – concernant le secteur commercial soient revus et adaptés aux circonstances nouvelles.

Plusieurs mesures importantes ont été prises au cours des dernières années. Ainsi, la libéralisation des échanges avec le monde extérieur et l'investissement dans le pays des capitaux étrangers avait déjà lieu il y a quelques temps ; l'obligation d'obtenir des licences générales d'exportation ou d'importation abolie en septembre de 1993. Les quelques exceptions à cette mesure ont été faites pour des raisons de sécurité, de la santé publique ou en vue de la protection de l'environnement. Néanmoins, certaines restrictions quantitatives sont toujours en vigueur afin de protéger les producteurs nationaux et d'assurer la couverture des besoins alimentaires des populations. Le port de Sihanoukville (Kompong Som) a été ouvert au trafic maritime international, comme un premier pas vers le rétablissement de l'infrastructure du commerce extérieur du Cambodge.

Le secteur privé a été autorisé des juillet 1989 de fonder des entreprises commerciales, avec une participation étrangère de 49% au maximum. Cette mesure fut un grand succès : en été 1993 500 entreprises commerciales ont déjà été enregistrées par le Ministère du Commerce ; parmi celles-ci il y a 5 entreprises d'Etat spécialisées dans le commerce des grands produits d'exportation ou d'importation — le caoutchouc, le bois grumes, le riz et les produits pétroliers.

En outre, le Gouvernement Royal a également entrepris de réformer l'administration et les opérations de douane. La structure des tarifs douaniers a été simplifiée et les tarifs préférentiels, pratiqués auparavant dans le commerce avec les pays socialistes, ont été supprimés. Les droits à l'importation ont été réduits de 50% en moyenne (exception faite pour les produits pétroliers dont l'imposition augmente d'année en année), et sont désormais établis sur la base de la valeur des factures présentées, au lieu de les imposer sur la base des listes de prix (ajustée périodiquement mais d'une façon tout à fait irrégulière). Si la base d'imposition des opérations économiques non commerciales pourrait être élargie, comme l'espère le Ministère des Finances et de l'Economie, les tarifs douaniers pourraient être graduellement réduits, tout en maintenant le niveau actuel ou augmentant même les revenus de l'Etat.

Dans le domaine monétaire, même si la loi impose aux commerçants de changer leurs rentrées en devises provenant des opérations d'exportation auprès des banques, aucune limitation légale n'empêche le transfert des bénéfices par les investisseurs étrangers dans leur pays. L'unification effective des taux de change a été complétée cette année, et les règlements concernant les devises seront libéralisés.

Toutefois, dans le domaine législatif et réglementaire concernant le secteur commercial, il reste encore beaucoup à faire. En premier lieu, il faut mentionner l'urgent besoin de l'adoption d'une loi organique définissant les responsabilités et les tâches de chaque département ministériel. Le Gouvernement du Royaume du Cambodge est résolu d'adopter le plus tôt possible cette législation fondamentale qui permettra d'ajuster en fonction de ses nouvelles attributions les lois et autres textes réglementaires touchant aux activités du Ministère du Commerce.

En plus de la loi organique, les textes législatifs, constituant les règles du jeu des activités commerciales dans le Royaume, sont ceux qui revêtent la plus grande importance. Ce sont ces textes qui définissent les actes commerciaux, qui régissent les contraintes nécessaires à la réalisation de la liberté des échanges dans le cadre d'une économie de marché et qui créent les institutions indispensables à son fonctionnement.

Une bonne partie de ces travaux de révision du droit commercial est déjà en cours. Ainsi, cette codification, constituant *le Code de Commerce* du Royaume du Cambodge, doit comprendre :

- La loi sur la réglementation commerciale et l'immatriculation des entreprises ;
- La loi instituant le droit des sociétés ;
- La loi relative aux contrats et devoirs des commerçants ;
- La loi concernant les faillites ;
- La loi relative aux juridictions commerciales ;
- La loi relative à la création de la Chambre de Commerce ;
- La loi relative aux marques, noms commerciaux et actes de concurrence déloyale.

Néanmoins, en ce qui concerne les opérations commerciales, certains textes réglementaires doivent encore être revus, une fois le travail législatif terminé. Un bon exemple de caractère impératif de la nécessité d'une telle révision est le fait que jusqu'à aujourd'hui le contrôle des stocks a été effectué par le Ministère du Commerce sur la base d'un ancien règlement ; il est évident que de telles dispositions doivent être écartées car elles ne correspondent plus aux options et stratégies gouvernementales. C'est les forces du marché qui orienteront désormais les activités commerciales.

QUATRIEME CHAPITRE

Développement des activités commerciales

1. LE COMMERCE EXTERIEUR

(a) *La promotion des exportations*

Sur le plan des exportations, plusieurs étapes, constituant une séquence logique, sont à prévoir. Brièvement, le programme de la promotion des exportations se composera des opérations suivantes :

(i) L'étude du potentiel à l'exportation par produits ou groupes de produits, selon une méthodologie bien connue et pratiquée dans le monde entier ;

(ii) L'étude des marchés extérieurs, autant dans la région du Sud-est asiatique et de l'Extrême-Orient que sur les marchés des pays industrialisés plus lointains mais accessible, pour les produits ou groupes de produits dont le potentiel à l'exportation a été identifié par les études préalables ;

(iii) Collecte des données, traitement et dissémination de l'information commerciale et techniques à tous les intéressés, susceptibles de promouvoir leurs connaissances des marchés étrangers ainsi que la compréhension des problèmes rencontrés par les produits exportés. Dans ce but, un Centre de Documentation spécialisé sera constitué au sein du Ministère du Commerce, qui sera toutefois transféré au CAMBPROM dès sa création. Les associations des producteurs exportateurs joueront un rôle crucial dans la dissémination de ces informations ;

(iv) L'adaptation des produits aux exigences des marchés, si besoin en est, en tenant compte des résultats des études de marchés étrangers et autres données disponibles ; cette adaptation peut consister dans une amélioration de la qualité des produits en question, ou dans la compression des coûts à la production par des mesures appropriées, ou, encore, par une politique plus agressive de pénétration des marchés cibles ;

(v) La création des nouveaux produits, lorsque les études des marchés étrangers ont démontré qu'une réelle possibilité de l'exploitation d'un créneau spécifique existe, et que les données sectorielles des productions déjà connues ou autres facteurs inexploités au Cambodge permettraient de créer une nouvelle branche d'activités économiques au profit de l'économie nationale. Le démarrage de cette opération ne peut être espéré qu'à long terme, tenant compte des difficultés actuelles rencontrées dans les secteurs productifs déjà existants comme l'agriculture, l'horticulture ou la pêche.

(vi) Un système élaboré de stimulants fiscaux et financiers, destinés à encourager et les producteurs (en particulier les petites exploitations agricoles, artisanales ou industrielles) et les exportateurs afin de les orienter vers l'exportation, augmenter les productions exportables ou, encore, d'améliorer la qualité de leurs produits, tout en essayant de réduire les coûts de production ;

(vii) Un système de financement à l'exportation à court- ou à moyen-terme, en s'appuyant sur le système bancaire commercial ; en constituant un Fonds de Garantie par l'Etat afin de faciliter l'obtention de crédit aux producteurs agricoles, aux éleveurs, aux pêcheurs, et aux petites et moyennes entreprises. La constitution de ce Fonds s'avérera probablement indispensable, car les banques n'ayant qu'une assise financière relativement faible, ne pourront pas prêter aux producteurs, petits fabricants ou sociétés exportatrices de moindre envergure sans une quelconque caution ayant fait de mauvaises expériences par le passé. Les associations des producteurs exportateurs joueront, encore une fois, un rôle considérable dans ce domaine, car elles peuvent aider les petits exploitants, entrepreneurs ou commerçants de remplir les conditions requises pour l'obtention des crédits (par exemple, préparation des soumissions aux instituts bancaires) ou, même, de se substituer comme garant des crédits obtenus par des producteurs ou exportateurs qui n'ont pas pu bénéficier des avantages offerts par le Fonds de Garantie.

(viii) Une participation accrue aux foires et expositions étrangères afin de promouvoir les produits nationaux autant que de faire connaître aux producteurs et exportateurs cambodgiens ce que leurs concurrents exportent, et quelles sont les qualités, les spécifications, les prix ou la présentation des produits concurrents.

(ix) La réduction des formalités et des procédures administratives afin de faciliter les opérations d'exportation ainsi que de réduire les charges inutiles qui accompagnent ces procédures (paiement des 'taxes illégales' pour des raisons diverses et non justifiées).

(x) Un dernier aspect important de la promotion des exportations est l'orientation des investissements privés vers les secteurs porteurs d'espoir d'une augmentation et de diversification des exportations cambodgiennes. Il est impératif d'orienter les investisseurs privés vers ces secteurs, en particulier vers l'établissement des petites unités de transformation de produits agricoles, horticoles, animales et de pêche dans les provinces, dans la proximité des lieux de production. Une telle politique est non seulement favorable aux exportations (ou à l'acheminement des produits transformés vers des marchés urbains, vu que les produits périssables ne pourront pas être transportés vers les marchés plus lointains), mais sera également créatrice d'emploi et génératrice de revenus dans des régions où la population a le plus besoin de voir des signes incontestables du progrès économique. En plus, les investissements privés pourront orienter les activités économiques vers de nouveaux secteurs et ainsi contribuer à la diversification de la gamme des produits exportables (en particulier dans les secteurs industriel et de l'artisanat) ; ces investissements joueront aussi un rôle important dans la création des usines à une plus grande échelle, dans la capitale ou dans les principales villes des provinces, pour produire les matériaux ou produits finis nécessaires à la transformation des productions exportables comme, par exemple, les fabriques d'emballages ou des ingrédients de conservation. Naturellement, la création de telles industries ne pourrait être envisagée qu'à long terme.

(b) *Rationalisation des importations*

La rationalisation des importations consiste, dans le contexte de la promotion du commerce extérieur, les opérations suivantes :

(i) La recherche des sources d'importation plus avantageuses que celles connues jusqu'à maintenant. Ceci se fera par l'étude des marchés étrangers non pas du point de vue des productions exportables, mais du point de vue des produits importés dans le pays. Ces études seront, au fait, des études comparatives sur le plan de la qualité, des prix, des composantes des prix à l'importation comme les frais de transport, etc. afin de trouver des marchés offrant des sources d'approvisionnement plus avantageuses que celles auxquelles on a eu recours jusqu'à maintenant.

(ii) Par les mesures appropriées, donc sans intervention directe des autorités dans les transactions commerciales avec l'étranger, réduire la sortie des devises pour des produits ne revêtant pas le caractère de première nécessité (non seulement les produits dits de luxes) afin d'orienter les achats à l'étranger plutôt vers les biens d'équipement, vers les biens et matériaux nécessaires à la production, vers les produits requis pour améliorer le niveau de vie des populations (par exemple, pharmaceutiques) ou pour renforcer la protection de l'environnement.

(iii) La simplification des procédures et la réduction des taxes et autres charges fiscales afin de permettre aux importateurs de réduire leur coût de revient (en ce qui concerne les producteurs), ou leurs prix de vente (en ce qui concerne les commerçants) afin de baisser le niveau général des prix et d'augmenter la marge de bénéfices pour permettre l'expansion des échanges du pays.

2. LE COMMERCE INTERIEUR

Les actions dans le domaine du commerce intérieur doivent viser en premier lieu de faciliter 1/ La transition d'une économie de planification centralisée à une économie de marché ; 2/ La mise en place des structures et des réglementations pour que l'espace de liberté d'action des commerçants soient bien défini et que les règles du jeu soient établies constituant le cadre dans lequel chaque opérateur commercial puisse agir à sa guise ; 3/ L'orientation des opérations commerciales sur le marché domestique afin qu'elles contribuent à l'augmentation du niveau de vie des larges couches de la populations. Dans cette perspective, la Direction du Commerce Intérieur procèdera à :

(i) Mettre en place des structures, ensemble avec d'autres organismes qui surveilleront l'application des normes, comme CAMCONTROL, ou contrôleront de tel aspect des opérations commerciales comme, par exemple, la correction des appareils de mesure supervisée par le Bureau des Poids et Mesures du Ministère de l'Industrie, dans le cadre des règlements généraux établis par le Ministère du Commerce et en exerçant une surveillance générale des marchés et autres réseaux de distribution.

(ii) Suivre l'évolution des prix sur les marchés et faire des propositions au Gouvernement Royal pour influencer leur formation, si besoin en est, par des mesures fiscales, financières ou autres ;

(iii) Etablir des prévisions, après des enquêtes régulières, sur l'évolution des marchés et de la consommation sans pour autant distinguer parmi les marchandises domestiques ou des marchandises importées ;

(iv) Etablir, sur la base des enquêtes périodiques, des statistiques de consommation, autant que faire se peut, afin d'en tirer des conclusions sur l'évolution de l'économie nationale ;

(v) Coordonner les activités des délégations provinciales dans tous ces domaines afin d'assurer la cohérence des actions, des statistiques, et des analyses économiques sur le plan national ;

(vi) Soumettre des propositions au Gouvernement Royal en vue d'améliorer les conditions de marché pour les marchandises de première nécessité et autres produits qui sont important pour la consommation des larges couches populaires si la situation sensiblement détériorerait à la suite du manque de devises, de la spéculation sur certains produits ou pendant certaines périodes de l'année quand il y a un accroissement net de la demande d'une catégorie des marchandises, etc.

CINQUIEME CHAPITRE

Programme de formation

Dans une période de transition si difficile que celle d'une économie centralisée à une économie de marché, le programme de formation est un élément crucial pour l'expansion du secteur commercial et le développement du commerce extérieur.

Le changement des mentalités et des traditions de pratique administrative et procédurale, ancrées dans les expériences de toute une vie professionnelle, est le plus difficile à modifier. C'est, bien sûr, tout d'abord un problème de générations ; néanmoins, de très grand progrès peuvent être réalisés dans la réorientation des activités des fonctionnaires et autres personnes en charge du développement commercial et de la promotion des activités du commerce extérieur, par une formation approfondie, répétée selon les besoins, et adaptée à l'état d'esprit et l'environnement culturel des participants dans ces programmes.

En vue de ces difficultés, des programmes de formation spécifiques seront organisés, avec des thèmes comme (i) Le concept et la réalité d'une économie de marché ; (ii) Le fonctionnement de l'économie de marché, et des marchés – réseaux de distribution – en tant que tels ; (iii) Législation et réglementation : leur rôle dans un 'Etat de droit', etc.

Les programmes de formation à mettre en place dans le secteur commercial incluront, entre autres, les sujets suivants :

- (i) Séminaires sur la programmation et la prévision en matière de commerce ;
- (ii) Simplification des procédures et de la documentation pour favoriser l'expansion commerciale ;
- (iii) Séminaires sur les techniques de négociations commerciales internationales ;
- (iv) Formation des représentants commerciaux cambodgiens à l'étranger ;
- (v) Voyages d'étude et formation à court terme dans des pays sélectionnés (dans la région et au-delà du Sud-est asiatique) pour des fonctionnaires et autres personnages officiels (comme, par exemple, le futur président de la Chambre de Commerce) ainsi que pour des représentants des producteurs ou exportateurs afin de familiariser les participants avec les solutions que les autres pays — pays en développement ou pays industrialisés, et, plus particulièrement, les pays de l'Europe Centrale et Orientale se trouvant dans la même phase de transition — ont trouvés à leurs problèmes similaires à ceux que rencontrent le Cambodge ;

(vi) Formation dans le pays et voyages d'étude à l'étranger concernant les techniques de la promotion des exportations et de la rationalisation des importations dont

- études du potentiel à l'exportation,
- études de marchés,
- techniques de marketing à proprement parler — comme calculs des coûts et des prix, contrôle et amélioration de la qualité, publicité, etc. ;
- organisation de la participation cambodgienne à des foires et exposition à l'étranger ;

(vii) Formation en méthodes statistiques avec référence aux besoins du secteur commercial ;

(viii) Formation en matière législative liée à la concurrence déloyale et les méthodes de surveillance qui en découlent ;

(ix) Etude de la langue anglaise dont la connaissance est obligatoire pour ceux qui s'occupent des opérations du commerce extérieur.

INSTITUTION AND INFRASTRUCTURE BUILDING FOR TRADE PROMOTION AT REGIONAL LEVEL

Trade Promotion in the Arab Region

Organization and Program of the Export Promotion Section in the General Secretariat of the Council of Arab Economic Unity

I. INTRODUCTION

Trade promotion and export development rank among the priority objectives of the member countries of the Council of Arab Economic Unity (CAEU). It is widely recognized that fostering trade among member countries might be a powerful element in the CAEU area's economic integration and that promotion of their imports to world markets is a *sine qua non* condition of the attainment of their economic development objectives such as raising of the standard of living, securing of a continuous high level of employment and ensuring that their natural resources are fully exploited to the advantages of each member country and the region as a whole.

Foreign trade accounts, on the average, for nearly 29% of the national income of the member countries of the CAEU. They export a number of traditional commodities (.e.g., crude oil, cotton, phosphate, fresh fruits and vegetables) which stand for about 85% of their total exports. However, several member countries like the Arab Republic of Egypt, Syria, Iraq and Jordan also export some industrial products like processed agricultural goods, textiles (woven cotton products), nitrogenous fertilizers, domestic refrigerators or motor buses, but not all of these exports represent yet a considerable volume. On the other hand, CAEU member countries possess natural resources which are not fully exploited and which can form the necessary base for the creation of export-based industries. For all these reasons, a co-coordinated export promotion policy is highly needed in order to foster trade between these countries and, simultaneously, to develop their exports to world markets.

Members to the Agreement on Arab Economic Unity which entered into effect in January 1964 are at present: the Arab Republic of Egypt, Syria, Iraq, Kuwait, the Arab Republic of Yemen, Sudan, Jordan, the Democratic People's Republic of Yemen, the United Arab Emirates, Somalia and Libya.

Within the Agreement on Arab Economic Unity, a decision was taken in 1964 to create an Arab Common Market, comprising presently five member states: Egypt, Iraq, Syria, Jordan and Kuwait. The Arab Common Market came into being in January 1965. Several measures eliminating tariff as well as non-tariff barriers among the member countries have been introduced.

However, the Council has come to the conclusion that efforts to reduce trade barriers are not conducive to achieve tangible results if they are not complemented by other practical measures in trade promotion to increase commerce among its members as well as with countries outside the region. The Council is also endeavoring to assist its members in harmonizing their production, trade, financial and monetary policies, and social and labor legislation.

In view of all the foregoing, the Secretary General of the Council decided to establish an Export Promotion Section, in the framework of the General Secretariat's Trade Department, in July 1975.

The International Trade Centre UNCTAD/GATT was requested to give a preliminary assistance to this Section in order to elaborate upon its organization and work program as well as to evaluate future needs in the field of international technical assistance.

II. FINDINGS

1. ORGANIZATIONAL ASPECTS

(a) *The Export Promotion Section in the Framework of CAEU's General Secretariat*

The Export Promotion Section was established, in the framework of CAEU's General Secretariat, as part of the Trade Department which deals with all trade aspects of the economic integration of the region and all co-coordinated commercial actions towards the outside world. It is a particularly important characteristic of the Trade Department's and, consequently, of the Export Promotion Section's place in the organizational build-up of the General Secretariat that it depends directly of the Secretary General in the same way as the Economic Department, Legal Department, etc. This shows the high priority assigned to trade developments in the Council's activities and will facilitate the launching the Export Promotion Section's Regional Trade Promotion Program. However, as the Trade Department and the Export Promotion Section are thus organically separated from the Economic Department and its sections like agriculture, industrial development or harmonization of planning among member countries, a close co-ordination is needed to avoid compartmentalization of various activities in the economic field.

(b) *Personnel of the Export Promotion Section*

The Head of CAEU General Secretariat's Trade Department, is also supervising the work of the Export Promotion Section. However, his workload does not allow him to devote even one-third of his time to export promotion activities. Only two persons working full time are assigned to the Section and are helped, occasionally, by other members of the Secretariat's staff

This limited personnel is evidently insufficient to realize all the objectives spelled out in the Regional Trade Promotion Program of the CAEU and to achieve results which are expected in the export promotion field by the Council's Secretary General. The lack of personnel assigned to the Export Promotion Section is made even more evident by the fact that they also have to perform duties, outside the scope of their daily work, whenever CAEU authorities need their assistance to resolve some urgent problems.

2. ACTIVITIES OF THE EXPORT PROMOTION SECTION IN 1974

The Export Promotion Section of CAEU's Trade Department work program is spelled out in the document, "Activities in the Export Promotion Section." This paper summarized the concept and methods of export promotion as seen by the officials attached to the Section and the need of an export promotion drive in the CAEU region for which the Agreement of Arab Economic Unity offers a suitable framework. In addition, this report deals with such subjects as (i) Export incentives in developing countries and their evaluation according to the provisions of the Agreement on the Arab Common Market; (ii) National strategies for export development, and (iii) Utilization for excess capacities for exports.

Last but not least, the document on the 1974 activities of the Export Promotion Section gave an outline of the market survey on the Arab Republic of Yemen, written in Arabic, which was elaborated by the Section in autumn 1974.

3. ACTIVITIES OF THE EXPORT PROMOTION SECTION BETWEEN JANUARY – APRIL 1975

The Section's activities during the first four months of 1975 were as follows:

(a) *Export/Import Analysis of CAEU Member Countries' Foreign Trade*

On the basis of national statistics available at CAEU's General Secretariat, the Section analyzed the main exports for the last 4 to 5 years, indicating the principal destinations and their part of the total, product by product, of the following countries: Egypt, Syria, Jordan, Iraq, Kuwait, Sudan and the Arab Republic of Yemen. (Unfortunately, statistics were not available concerning the four other member countries.)

As a result of this analysis at this first stage, 21 products were selected as main export items of the CAEU region.

The import analysis was based on the list of these selected products in order to show for which commodities and industrial goods are possibilities to substitute imports of member countries originating from outside the region by exports coming from CAEU member states. Product by product the conclusion point out, whenever appear to exist such an opportunity, the eventual promotional actions to be undertaken.

This work offered an excellent opportunity for the training of the counterpart personnel in research techniques and foreign trade analysis.

(b) *Market Survey of the Arab Republic of Yemen*

The survey was finalized in March 1975 and its results discussed between the local and international personnel.

(c) *Preparation of the Future Work of the Section*

In consultation with the Head of the Trade Department/Export Promotion Section, the following papers were prepared:

- A list of criteria in view of the selection of products to be included in the export promotion program (Annex 1);

- A checklist of subjects to be examined when a product study is prepared (regional export potential) (Annex 2).

4. DOCUMENTATION AT CAEU'S GENERAL SECRETARIAT

CAEU's documentation is at present in a room of about 50 m² on three double-shelves as well as in the office where work the two persons in charge of it. In this office there are also filing cabinets for some clippings and documents, and shelves for periodicals.

There are two other rooms which are empty and also a big hall to which the other four rooms are adjacent. With all this space more than 200 m² could be used for documentation purposes, there seems to be no difficulty in view of the future expansion of the organization's documentation.

Two persons are in charge of the documentary collection, but none of them has a proper specialized training in documentation/information techniques. They are consequently not in a position to fulfill their tasks. No control of the out-going documents exists, many of the documentary materials, whether books or periodicals, are therefore lost or dispersed in the various offices.

III. RECOMMENDATIONS

1. ORGANIZATIONAL ASPECTS

It is recommended that the Export Promotion Section of the CAEU General Secretariat should consist, during the first years of its activities, of two units:

- (a) The Trade Information and Documentation Unit, and
- (b) The Marketing Research and Joint Promotional Activities Unit.

At a later stage, a third unit should be attached to this Section, the Training Unit.

The Trade Information and Documentation Unit will also be responsible, in addition to its proper activities, for all publications in the trade promotion field (e.g., Information Bulletin or Trade Directory and the translation of selected publications in marketing).

The Marketing Research and Joint Promotional Activities Unit will be responsible for all studies (export/import analysis, market surveys, product or commodity studies and specific market research studies) and for all actions (market development projects, joint marketing ventures, trade missions, joint promotional campaigns, export/import incentives).

The Training Unit will initiate and co-ordinate training programs at a region-wide level.

It is recommended that the Export Promotion Section of the CAEU General Secretariat should be strengthened in order to reach the minimum number of eight (8) persons. These full-time personnel would be composed of:

- The Head of the Section;
- Two documentalists for acquisitions, loans, and for establishing files per product, per country and per exporters/importers;
- Two trade information specialists (Monthly Trade Information Bulletin and Trade Directory);
- Two market research analysts, and
- One training officer.

Two full-time secretaries should be attached to the Section of whom one should be bilingual English-French.

2. ACTIVITIES

It is recommended that the General Secretary of the CAEU and the governing bodies of the Council adopt the work program entitled: *CAEU's Work Program in Trade Promotion 1975/1978*. This program is based, after discussions with the organization's Secretary General and his principal advisers, on the three following papers:

— *A Regional Trade Promotion Program*, including a proposal concerning the CAEU's Work Program in Trade Promotion for 1975-1977;

— *A Note on the CAEU's Information and Documentation Centre* to be created as soon as possible; and

— *Program Aiming at the Creation of Export Awareness among Officials and Representatives of the Business Community of the CAEU Region, 1975-1977.*

It is recommended that the Trade Information and Documentation Unit which at present will be organized within the framework of the Export Promotion Section should be attached, at a later stage, to CAEU's Information and Documentation Centre as a specialized section of it in order to avoid duplication of work (multiple acquisitions, catalogues, files, etc.)

It is recommended that once the export promotion activities of the CAEU are launched and the Export Promotion Section proved its competence and usefulness and a well-trained personnel is at the CAEU's General Secretary's disposal for export promotion purposes, the Export Promotion Section should be transformed in an independent Centre for Export Promotion depending of the General Secretariat. This Centre might then have the same status as the CAEU Statistical Centre the creation of which is recommended by the Economic Committee to the Council's next plenary session.

It is recommended that the CAEU request the technical assistance of the International Trade Centre UNCTAD/GATT, – financed either by the UNDP or through contribution of an Arab Fund, or by funds-in-trust to be provided by the CAEU, – which should enable the Export Promotion Section to develop its organizational structure; to train its personnel in the field of trade promotion and in international marketing techniques and to assist it in implementing the Work program indicated above. The above mentioned work program contains the necessary indications about the assistance suggested and also an estimated budget covering the cost of the international inputs (experts, consultants, training courses, etc.) during the years 1975/1978.

ANNEX ONE

CRITERIA

For the Selection of Products In View of Export Promotion Activities

The marketing era brought a revolutionary change in the commercial activities of the enterprises, private or public, in the economic life of a country and in the trade among nations. It means, simply stated, that one does not sell and export what one produces, but one sells and exports what satisfies the needs of consumers and utilizers of a given product. One endeavors therefore to adapt production to the identified needs and preferences of the consumers and utilizers, e.g., after having undertaken market research studies, tests, trade missions to the target markets and also having exposed the product at trade fairs and exhibitions where its various aspects (quality, price, etc.) will be compared by future consumers or utilizers to those of similar goods of the competitors.

Nevertheless, the first and important step is to identify the products which should be promoted. The definition of criteria for the selection of products in view of their inclusion in export promotion activities is presented here in the framework of this marketing concept.

First Stage: Export Statistical Data

1. Criterion: The size (volume and value) of yearly exports of the products considered.
2. Criterion: The dynamism or sluggishness of yearly exports of the products considered (evolution in% as compared to the preceding year).
3. Criterion: The part of each export item under consideration in total annual export earnings of the country (in percent).

Second Stage: Production/Consumption Data

1. Criterion: The trend of production of each export item considered (evolution of production during the last five years in percent).

2. Criterion: Production forecasts for at least five years, but – if possible – at longer term for each product considered (targets of the Plan, investment targets of the Government and of the public and private sectors, – at least some reliable estimates, – concerning the output of the product examined).

3. Criterion: Domestic consumption forecasts for at least five years, but – if possible – at longer term for each product considered (forecasts of the plan and of the business community, public or private sector); forecasts even in the form of 'educated guesses' are very useful.

4. Criterion: Export potential at medium- and long-term, for each product under consideration on the basis of production and domestic consumption forecasts.

Third Stage: Price Data

1. Criterion: Whenever possible, comparison of production costs of all goods considered with similar costs in producing countries, first of all in the CAEU region and, afterwards, in other regions of the world, or with international production cost standards if they exist (see, for example, UNIDO).

2. Criterion: Comparison of export prices (FOB or CIF) of the products examined with export prices of other countries of the CAEU region

*Fourth Stage: Export Performance**

1. Criterion: Successes of the products studied on export markets, in the CAEU region or elsewhere, and their reasons:

- Quality (grading, variety, etc.)
- Packing
- Competitive prices
- Timing: out-of-season exports
- Low transportation costs (fee. short distances to neighboring countries, good transport facilities, etc.)
- Good sales promotion
- Others

* Exports made in the framework of bilateral trade agreements should not be taken into consideration when evaluating export performance.

2. Criterion: Failures of the products studied on export markets, in the CAEU region or elsewhere, and their reasons:

- Quality (grading, variety, etc.)
- Packing
- Non-competitive prices
- High transport costs
- Lack of proper promotional support
- Others

12. Criterion: Successes of failures of the products studied because of organizational and/or sectoral problems such as small-scale industries, administrative procedures, restriction of imports on raw materials, or semi-finished products entering in export goods, etc.

For new products, e.g., products not yet exported, their selection should be done according to criteria 4–12, being understood that in the case of criteria 10, 11 and 12 an evaluation has to be made, on the basis of the points enumerated, of the probable success or failure they would have on export markets in the CAEU region or elsewhere.

NOTE

This checklist of criteria to be applied when selecting a product in view of export promotion activities is exhaustive. If one or the other of the criteria cannot be applied because of lack of information concerning certain products, the latter can still be included in export promotion studies and actions.

ANNEX TWO

CHECKLIST

Various Kinds of Information Which Should be Dealt with in a Product or Commodity Study

Product studies prepared by CAEU's Export Promotion Section correspond, at a regional level, to what one calls export potential studies in a national framework. Their specific characteristics are twofold:

1. After a thorough analysis made according to the headings which are enumerated below, a synthesis must be undertaken of data reflecting national in order to get to conclusions which represent, in a realistic way, the export potential of a given product of the CAEU region.

2. Economic integration being a first priority even in the export promotion field, each study should point out, whenever it is possible and necessary, the specific opportunities or hindrances what the product or the product group studied might meet on CAEU member countries markets.

The checklist given here intends to be exhaustive, though some particular aspects of trade in CAEU member countries might not be included; however, officials who do not find at present all the relevant data should consider this checklist as a high target and not to be discouraged because they cannot deal with all the headings listed below. The trade information flow which will be, hopefully, created in the CAEU region would permit in a not-so-distant future, to complete the studies prepared at a time when the required information was not available.

(The following headings are organized by subject, e.g., systematically, concerning individual products or product groups; if a product or product group is exported by several member countries of CAEU, under each heading the information should be organized and presented by country (for example, Description of the product: D/ Standardization, national or international (the latter, of course if it is applied in the countries concerned): Syria, Iraq, Egypt and so on, with a synthesis at the end. This method, though making more difficult the compilation of data and the writing of such a study, would allow for an immediate comparison of the various types of information in respect of all exporting countries of the region.)

Chapter One: The Description of the Product

(a) Identification in terms of international systems of nomenclature (BTN and SITC), indicating also the modification applied by the national customs authorities, especially in the foreign trade statistics (fifth and sixth digits).

(b) Description of the product or group of products, its characteristics, its varieties, if any, etc.) Quality, grading, technical specifications, quality control.

(c) Standardization, national and international.

Chapter Two: The Enterprise

(a) Sectoral data: the structure of the sector; relative roles of the public and private sectors; monopolies, etc.

(b) Structure of individual enterprises of a certain size, especially description of their export or marketing departments, if there are any.

(c) Analysis of their balance sheet and any other available financial data.

(d) Geographical whereabouts of the producing plants belonging to the enterprise, their distance from ports or railway stations or road facilities, and principal means of transport utilized.

(e) Their overall production and production capacities as well as production and production capacities per producing units; analysis of the evolution of production during the last five years, unused existing capacities, investment plans and projected capacities.

(f) Equipment of applied research laboratories, if any, and analysis of external assistance for enterprises whether they benefit of it or not.

(g) Sales promotion activities of the enterprise (catalogues, participation at trade fairs, etc.), its brand policy and existing brands.

(h) Export sales experience and problems met by marketing and export sales executives.

(i) Names, addresses and phone numbers of export marketing and export promotion executives of the enterprises.

(j) Main clients' names and location.

Chapter Three: Production

1. Present production

(a) Time table, seasonality and rhythm of production

(b) Evolution of national production (statistical analysis of the last five years' production), annual increases or decreases, average yields.

- (c) Utilization of present production capacities.
- (d) Stocks and stocking facilities (warehouses, etc.)

2. Foreign supplies

- (a) Evolution of imports of raw materials or semi-finished products incorporated in export products (last five years' statistics), by countries of origin.
- (b) Import regimes for these products and materials
- (c) Possible imports of similar products (substitution)
- (d) Import prices of foreign supplies, their variations, by country of origin.

3 Prices

- (a) For agricultural products: prices, frequently fixed by Government decrees, at which peasants and cooperatives are paid for their produce
- (b) For mining and industrial products: factory prices (production costs.

4. Production forecasts

- (a) Production forecasts for the next five years at least, or even more if they are available
- (b) Investment plans (national plans, sectoral projects, etc.).

Chapter Four: Sales

1. Domestic Consumption or Sales on the Home Market

- (a) Domestic consumption for the last five years, annual increases;
- (b) Domestic consumption forecasts, if there are any;
- (c) Domestic prices, wholesale and retail;
- (d) Distribution network, intermediaries, monopolies, etc., e.g., organization of distribution on the home market.

2. Exports

(a) Development of exports during the last five years by countries of destination; their annual growth and with indices; minimum and maximum unit values; share of each export market in total exports of the product.

(b) Export prices (FOB and CIF).

(c) Analysis of the export price structure, relevant rules established by national authorities, if any; influence of fiscal policies of the exporting and of the importing countries on export prices.

(d) Means of transport utilized, itineraries, duration of maritime transport to the importing markets, availability of transport required, harbor facilities.

(e) Freight and their effect on export prices.

(f) Bilateral trade agreements applicable to the product studies.

Chapter Five: Foreign Markets

(This chapter should be divided in two parts: markets of CAEU member countries and world markets; the same headings should be used for each market in both categories.)

(a) Demand of the product on foreign markets.

(b) Internal consumption and relevant forecasts on the markets dealt with.

(c) Distribution network.

(d) Identification of corresponding products of competitive suppliers and their characteristics; analysis of imports of these products on the markets under study.

(e) Customs duties and other applicable taxes.

(f) Import regime.

(g) Payment and delivery conditions.

(h) Trade agreements favorable to competitor suppliers.

ANNEX THREE

Proposal Concerning the CAEU's Work Program in Trade Promotion (1975–1977)

(This proposal takes into account the various points of the program outline prepared by the Export Promotion Section and also the activities already going on.)

The basic tools of CAEU's trade promotion drive will be the following:

A. STUDIES

1. *Analysis of the member countries' exports* by product or product group and by destination (who is exporting what and where?) for the last five years, showing the trend; this analysis has to be updated first yearly, later – is possible – every six months or so.

2. Based on the results of the analysis of the region's exports, e.g., after identification of the main and most important export products an *analysis of the member countries' import markets* and of those of the principal importing countries of the world has to be undertaken for those products or product groups identified. This analysis, which is to be updated as regularly as the export study, ought to include comparisons of prices or unit values in order to show which markets offer more profitability.

3. *Market studies* concerning each member country describing, in general, conditions prevailing on their markets, export/import regulations, main economic indicators, analysis of their exports and imports, etc.

4. *Product studies* which deal with products selected on the basis of the foregoing export/import analysis and which examine them in depth: their description, natural or technical qualities; the producing sector's characteristics; production (evolution during the last five years and forecasts taking into account national plans, investment targets, etc.); local consumption, prices and distribution channels; marketing problems such as packaging, transport, administrative procedures, etc.; evolution of exports based on the preceding analysis and of export prices (FOB or CIF); sales promotion; problems of exporters facing regional or international competition.

5. *Market research studies*, including investigations on the spot in the countries concerned, for specific selected products or product groups, based on the export/import analysis and the product studies.

B. PUBLICATIONS

1. *CAEU Region's Trade Directory*: It will include a short description of each member country's economy; an overall analysis of the region's exports and imports; a summary of each member country's export and import regulations, administrative procedures regarding foreign trade and requested export and import documentation; and a Directory (or Index) of exporters/importers concerning which the collect of information has already been started. The Directory of exporters/importers should be divided in two parts: their listing in alphabetical order by country, and another list according to products or product groups. It would be useful if CAEU's Trade Directory would be published in three languages, Arabic, English and French, in order to serve trade expansion among member countries as well as on world markets.

2. *Monthly Trade Information Bulletin*: It would be most useful to circulate as soon as possible a monthly trade information bulletin among member countries' interested governmental agencies, chambers of commerce and industry, professional and trade associations, and individual exporters/importers in order to foster their interest in promoting exports and create links between CAEU's Export Promotion Section and the above mentioned organizations or business enterprises. Each issue may include a short study on a specific market; articles on questions of trade policy, trade negotiations, current events in the world economy (for example, monetary issues), or on selected marketing techniques; some well-chosen statistics or price quotations being of interest to exporters/importers as well as news regarding CAEU General Secretariat's activities in the field of trade or export promotion.

C. ACTIONS (based essentially of the above mentioned studies)

1. *Joint Marketing Corporations*: Fostering through practical suggestions the creation of new, joint marketing ventures for new product groups; cooperation with already existing corporations through guiding them in their export promotion activities along the main lines of the CAEU Export Promotion Section's work program. This would mean that concerning product groups for which joint marketing corporations are set up, the General Secretariat's Export Promotion Section could discharge all its functions (studies and actions) at those joint ventures, acting only as adviser, disseminating information they would channel to it and being the coordinating agent in their respective activities.

2. *Trade missions*: Organization of trade missions from and to member countries as well as to industrialized and developing countries, with market or centrally planned economies, potential importers of the region's products. It is proven that trade missions are among the most efficient tools of export promotion, but a central and coordinating agency is needed to organize them inviting all interested exporters to participate from all member countries.

3. *Joint Promotional Campaigns*. At a later stage, and when a definite need is felt, CAEU's Export Promotion Section could organize joint participation at trade fairs and specialized exhibitions on the most important import markets of the world for exporters of selected product groups. The importance of specialized fairs or exhibitions must be emphasized, – for example the one in Cologne, ANUGA, which takes place every second year and concerns foodstuff and beverages, – or the yearly exhibition in Paris

of leather clothing, etc. Participation at general fairs (in most cases a question of prestige) should not be a concern for CAEU, except when the fair is organized in a way that similar products of all member countries are exposed in the same pavilion, like the Milan International Trade Fair, a case to be assimilated to specialized exhibitions.

4. *Export/Import Incentives.* After having analyzed the export/import regimes of member countries, CAEU's Export Promotion Section should put forward suggestions to the Secretary General, and through him to the Council members, concerning official measures to encourage exports, to stimulate imports from other member countries, (for example, preferential customs duties), to simplify procedures and standardize export documentation, etc.

5. *Creation of Export Awareness:* Following a large scale meeting on the promotion of exports of the region's products which should be attended by representatives of Governmental departments, public administrations, chambers of commerce and industry, professional associations and individual exporters/importers, a series of symposia may be organized, with a more limited participation, by CAEU's Export Promotion Section (see on this subject a separate annex).

6. *Training in the Field of Export Promotion:* CAEU's Export Promotion Section should organize, together with educational and training institutions of the region and the Training Section of the International trade Center UNCTAD/GATT, training programs in export promotion at different levels, with participants from each member country (see also the separate annex concerning this activity).

7. *Trade Information and Documentation:* There is an evident need for CAEU to create an Information and Documentation Center serving the General Secretariat, which would be a basic instrument for its Trade Department and Export Promotion Section in their activities. The setting up of such a center and the collection, retrieval and dissemination of information (see point II/2) are one of the most urgent tasks with a view to create an export drive in the region. Most of the studies and actions enumerated above could not be undertaken if the necessary information is not available in CAEU's offices. The systematic organization of retrieval and dissemination of information (including dissemination of relevant information to the respective departments and services of the General Secretariat) is as important as the collection of data and acquisition of books and documents because it would facilitate the work of officials, researches and possible "outside" customers (see the separate annex on such a Center attached to this report).

TIME TABLE

For the Proposed Work Program of CAEU's Export Promotion Section

1975–1977

1975

This year should be considered as a basic preparatory year for the Section's activities:

I. *Studies*

- Analysis of member countries' exports
- Analysis of member countries' imports of principal export products of the region
- Market studies concerning the following member countries: Arab Republic of Yemen, Democratic Popular Republic of Yemen, Somalia, and Sudan
- Product studies of three (3) selected, important export products of product groups.

II. *Publications*

- Preparation of CAEU's Trade Directory as described in the work program, but only in Arabic; to be submitted to the large-scale conference on export promotion.

III. *Actions*

- Organization of a large scale conference on export promotion with the assistance of ITC/UNCTAD/GATT.

IV. *Trade Information and Documentation*

- *Establishment CAEU's Information and Documentation Center.* Acquisition of basic documentation and collection of basic data; organization in a systematic way of data retrieval (cards, bibliographical analysis); establishment of pending files, according to products or product groups and countries; for press cuttings and other current information; dissemination of information inside the General Secretariat.

It would be possible to request an assistance of ITC for the establishment of the Information and Documentation Center. This assistance may include: funds to buy basic documentation and to subscribe to periodical publications indispensable for the Trade Department's and the Export Promotion Section's work; acquisition of the necessary equipment; scholarships for one or two persons to participate in ITC's specialized training courses in Geneva; services of one or two experts for a period of 6 to 12 months who would help in the establishment of the Center and give on-the-spot training to its personnel.

1976

I. *Studies*

- Updating of the export/import analysis undertaken in 1975
- Analysis of main importing markets of the world for principal export products or product groups of the region; on the basis of this analysis, selection of target markets for the first market research studies
- Market studies concerning the rest of member countries: Egypt, Syria, Jordan, Iraq, Kuwait and the United Arab Emirates
- Product studies of three (3) important products or product groups
- One market research study for a product or product group analyzed in 1975, in 3 or 4 member countries of the CAEU region; another market research study for another product or product group in some industrialized countries, for example selected countries of the European Common Market.

II. *Publications*

- Publication of CAEU Trade Directory's first edition (it should be updated at least every 3 years). Finalization of the Arab manuscript taking into consideration the comments and corrections made by participants of the large scale conference on export promotion; translation of the text in English and French; editing and supervision of the publication
- Start of the publication of the Monthly Trade Information Bulletin even in a mimeo typed form at the earliest possible date of the year, depending on availability of information and the regular flow of incoming information from member countries.

III. *Actions*

- Cooperation with the two existing joint marketing corporation in all fields of export promotion. Study of the need to create new ones for specific product groups based on the product studies.
- Organization of two trade missions for exporters from member countries, one to other member countries possible importers of their products, and the second to industrialized countries – both groups of countries should be selected among those which were included in the two market research studies already completed. In this way, the results of those studies could be used without delay demonstrating, at the same time, the necessity to undertake such market research studies.
- Organization of one or two training programs.

IV. Trade Information and Documentation

Continuation of the building up of the Center established in 1975 and of its regular work of collection, retrieval and dissemination of information.

1977

I. Studies

- Updating the export/import analysis
- Updating the analysis of main importing markets of the world for the principal export products or product groups of the region; selection of target markets for two market research studies to be undertaken during the year.
- Product studies of five selected, important products or product groups
- Two market research studies, one in the region, and one outside of it (for example, some Socialist countries of Eastern Europe).

II. Publications

- Continuation of the publication of the Monthly Trade Information Bulletin.

III. Actions

- Cooperation with existing joint marketing corporations; creation of at least two new joint marketing ventures
- Organization of four trade missions for importers from member countries
- Organization of two symposia
- Organization of two training programs.

IV. Trade Information and Documentation

- Continuation of regular activities of the Centre,

MANNING REQUIREMENTS

For the Execution of CAEU Export Promotion Section's Work Program

The Export Promotion Section of CAEU General Secretariat's Trade Department consists at present of two persons under the supervision of the Trade Department's Head who, himself, cannot work more than one-third of his time on export promotion problems.

Therefore, it appears very urgent to recruit or assign more staff to this Section; two more persons at least in 1975, three more in 1976 and two more in 1977. Consequently, at the end of three years' activities the staff of the Export Promotion Section would consist of nine persons supervised by the Head of the Trade Department. This is a minimum requirement.

It should not be forgotten that the Export Promotion Section's staff members, though all should have a solid academic background, would need a complementary training in export promotion techniques, either in-job training by experts and consultants, or by participating in ITC's training programs in Geneva. Export promotion in developing countries (an approach entirely different of that applicable in industrialized countries) is a very new activity, export promotion or international marketing is not included in academic curricula, except at the universities in the United States, and therefore it is a completely new field for university graduates. This explains the need of complementary practical training.

ANNEX FOUR

CAEU's Detailed Work Program in Trade Promotion 1975–1978

- I. NEED FOR A STRATEGY OF EXPORT PROMOTION
 - 1. Concept and objectives
 - 2. Organization for export promotion
 - 3. Role of the CAEU and its objective in trade promotion
- II. PROPOSED TRADE PROMOTION PROGRAM FOR THE CAEU
 - 1. Objectives
 - 2. Elements of the Program
 - (a) Organizational Aspects
 - (b) Trade Information and Documentation
 - (c) Market Research and Market Development Activities
 - (i) General Studies
 - (ii) Market Research Studies
 - (iii) Market Development Activities
 - (iv) Joint Marketing Actions
 - 4. Training
 - 5. Publications
- III. DESCRIPTION OF ACTIVITIES AND THEIR REALIZATION IN 1975-1978
- IV. BASIC REQUIREMENTS
 - 1. Staff
 - 2. Logistic Support
 - 3. Technical Assistance

I. NEED FOR A STRATEGY OF EXPORT PROMOTION

1. CONCEPT AND OBJECTIVES

The promotion of exports has been recognized as a key factor of economic development in developing countries. Over the past decade many governments of developing countries have come to realize that import substitution no longer provided an adequate driving force for satisfactory economic development and have turned instead to devote more efforts to export growth. International studies have demonstrated that developing countries that have stressed export promotion in their economic development have achieved, on the average, better growth performance than developing countries which have emphasized import substitution.

2. ORGANIZATION OF EXPORT PROMOTION

The majority of Arab countries has limited internal markets and should per force be oriented to wider external markets, particularly within the region, if production is to be viable and economic.

Export promotion has to be well organized at the national level and governments in developing countries bear a heavy responsibility for organizing activities, mobilizing resources and molding public opinion in support of export development if an export-oriented, as opposed to import-substituting, trade policy is to succeed. Export promotion should therefore be regarded as an essential element in economic planning and as a short-term approach to improving the trade balance of developing countries. It should also be understood by governments as an activity essential for establishing a reliable market-oriented approach to export development.

3. ROLE OF THE CAEU AND ITS OBJECTIVES IN TRADE PROMOTION

Foreign trade of member countries of the Council of Arab Economic Unity accounts, on the average, for 29% of their national income. These countries export a limited number of traditional goods (e.g., crude oil, cotton, phosphate, fresh fruits and vegetables, etc.), but also some industrial products like textiles (articles of woven cotton), nitrogenous fertilizers, electric refrigerators or motor buses. However, traditional exports account for nearly 85% of their total exports. On the other hand, CAEU member countries possess natural resources which are not fully exploited and which might offer a basis for the establishment of various export-oriented industries. For all these reasons, a coordinated export promotion policy is highly recommended in order to increase exports between member countries as well as to world markets.

Promotion of exports from one member country of the CAEU to another could be, in fact, a powerful factor in the area's economic integration. The Agreement on Arab economic unity aims to develop economic and social programs in the area through common actions. The establishment of an Arab

Common Market is a fundamental objective set out in this Agreement which foresees the gradual harmonization of economic policies of member States. The aim which consists in the harmonious development of economic activities implies a continuous and balanced expansion of exports among members of the CAEU and to markets outside the region.

In view of the realization of these objectives, the Agreement stipulates procedures which should lead to the complete elimination of customs duties and non-tariff barriers among the member States. In addition, the Council made several proposals concerning coordination of agricultural and industrial policies as well as common fiscal and social legislation. Hence, the Agreement can be considered as a convenient framework for export promotion.

As trade promotion and export development rank among the priority objectives of member countries of the Council of Arab Economic Unity, the Secretary General of the organization created an Export Promotion Section in the Trade Department through regulation Nr. 101, of 11th of July 1974.

II. PROPOSED TRADE PROMOTION PROGRAM FOR THE CAEU

A. OBJECTIVES

(a) To structure and strengthen the Export Promotion Section of the General Secretariat of CAEU with a view to performing the following services to member countries:

- Collect, analyze and disseminate trade information regarding trade regulations, export opportunities, etc. and play the role of catalyst in this field among member countries;
- Undertake market research studies and advise on marketing requirements in member countries;
- Initiate and coordinate training activities for personnel working in the field of foreign trade in member countries;
- Provide member countries with relevant publications related to market research studies and marketing techniques either prepared by the Council's Secretariat or by specialized international agencies.

(b) Assist in stimulating export awareness and strengthening the machinery needed for export promotion in member countries.

B. ELEMENTS OF THE PROGRAM

In order to realize the objective of CAEU in export promotion the proposed export promotion program should comprise the following elements:

1. ORGANIZATIONAL ASPECTS

The Council will continue its efforts to strengthen the structure and operations of the recently established Export Promotion Section. It is recommended that this Section consist, in its final stage of organization, of three units:

- (a) Trade Information and Documentation Unit,
- (b) Marketing Research and Joint Promotional Activities Unit, and
- (c) Training Unit.

The trade information/documentation unit will be responsible for all publications in the trade promotion fields (e.g., Information Bulletin and Trade Directory). Training will be, during the initial period of building up the Export Promotion Section, limited to its own personnel; however, later a third unit should be attached to this Section which will initiate and coordinate training programs at a region-wide level.

The minimum requirements of staff will be elaborated upon in part IV of the program.

2. TRADE INFORMATION AND DOCUMENTATION

It is evident that there is an urgent need for the creation of a trade information/documentation unit. Establishing such a unit should be considered as high priority and a *sine qua non* condition for the successful realization of CAEU's export promotion program.

Trade information and documentation will have to embrace all matters of interest and serve all relevant departments and services in the CAEU General Secretariat.

The collect, analysis and dissemination of relevant trade information to the member countries will enable them to formulate, at national and regional levels, trade policies and export strategies as well as to foster exchange of goods among these countries. A well-functioning regional trade information system should be a strong element in the area's economic integration.

In this perspective, the main objectives of the trade information and documentation unit will be as follows:

- (i) To be the focal point of the region's trade information system and thus play the role of a catalyst in this field among member countries;
- (ii) To assist in setting up or strengthening of national trade information systems that would enable individual members countries to meet their national export promotion objectives and take advantage of new sales opportunities as well as to contribute to and benefit from the flow of trade information in the region;

(iii) To assist in the coordination of adopted classification concepts and systems in member countries so as to make possible and facilitate cooperation and mutual assistance;

(iv) To provide eventually in-service training for the necessary specialized personnel from member countries.

At a later stage of the existence and development of the Trade Information and Documentation Unit, it will be necessary to collect information on prices, whenever necessary, and to immediately diffuse that information to member countries, using quick communication systems, e.g., telex (the Unit may concentrate on industrial products, and coordinate, concerning agricultural commodities, with the FAO Agricultural Marketing Project in Beirut).

3. MARKET RESEARCH AND MARKET DEVELOPMENT ACTIVITIES

(a) *General Studies*

— Analysis of member countries' exports by product or product group and by destination (who is exporting what and where?) for the last five years (showing the trend); this analysis has to be updated at first yearly, later – if possible – every six months or so;

— Based on the results of the analysis of the region's exports, e.g., after identification of the main and most important export products, an analysis of member countries' import markets and of those of the principal importing countries of the world has to be undertaken for those products or product groups identified above. This analysis, which has to be updated as regularly as the export study, ought to include comparison of prices or unit values in order to show which markets offer more profitability.

— Market studies concerning each member country describing, in general, conditions prevailing on their markets, export/import regulations, main economic indicators, analysis of their exports and imports, etc.

(b) *Market Research Studies*

— Product studies, which deal with products selected on the basis of the foregoing export/import analysis, examining them in depth, including their description; natural and technical qualities; the producing sector's characteristics, production data (evolution during the last five years and forecasts taking into account national plans, investment targets, etc.); local consumption, prices and distribution channels; marketing problems such as packaging, transport, administrative procedures, etc.; evolution of exports and forecasts based on the preceding analysis, export prices (FOB and CIF); sales promotion, and problems of exporters facing regional and international competition;

— Market research studies proper, including investigations on the spot in the countries concerned, for specific, selected products or product groups, based on the export/import analysis and the product studies.

(c) *Market Development Activities*

The undertaking of market research studies should be followed by concrete market development activities which are expected to lead to direct results at a further stage. In this connection, the program foresees the creation of export marketing teams which would implement specific marketing projects, comprising:

- Product selection, study of the export potential, identification of priority markets and preparation of field trips;
- Field study in selected target markets;
- Development of marketing strategies and plans for the products under consideration;
- Advice and assistance to selected national exporters through taking advantage of export possibilities determined by the market development teams.

The marketing teams should comprise representatives of exporting enterprises from member countries.

(d) *Joint Marketing Activities*

- CAEU's Export Promotion Section should be instrumental in setting up joint marketing ventures for products and product groups for which the need is felt to undertake joint activities;
- Trade missions should be organized by the Section, if required, to foster intra-regional trade;
- Joint participation at trade fairs should also be promoted, whenever necessary, by the Export Promotion Section, in order to avoid competition between member States, for products exported by a number of member countries.

4. TRAINING

The training component of the program aims at realizing the following objectives:

- Training of the personnel in charge of trade promotion and export marketing activities within the Council's General Secretariat;
- Initiation and organization of training programs by the Export Promotion Section for the personnel, at all levels of responsibility, working in the field of trade promotion and export marketing in member countries;
- Assisting in strengthening, at national level, teaching institutions' programs in international trade.

In the initial phase, some of these objectives will be attained by:

- Organization of conferences and seminars for the study, and endorsement of proposals put forward by the Secretariat, on export promotion activities;
- Short seminars on specific marketing problems and/or export products of interest;
- Basic training courses, set up by the Export Promotion Section, for personnel in charge of trade promotion in member countries.

5. PUBLICATIONS

— *Monthly Trade Information Bulletin*. It would be most useful to circulate as soon as possible a monthly trade information bulletin among member countries concerned Governmental agencies, chambers of commerce and industry, professional and trade associations and individual exporters/importers in order to foster their interest in promoting exports and rationalizing imports. The bulletin will create a link between CAEU's Export Promotion Section and the above mentioned organizations or business enterprises. Each issue may include a short study on a specific product or on a specific market; articles on questions of trade policy, trade negotiations, current events in the world economy (for example, monetary problems), or on selected marketing techniques; some well chosen statistics or price quotations, being of interest to exporters/importers, as well as news regarding the activities of the Export Promotion Section of the General Secretariat may complement the content of each issue.

— *CAEU Trade Directory*. The Trade Directory would consist of a short description of each member country's economy; an overall analysis of the region's export and imports; a summary of each member country's export and import regulations, administrative procedures regarding foreign trade, and required export and import documentation. The main body of the Directory will be the directory proper (or Index) of exporters/importers, concerning which the collect of information has already been started. The directory of exporters/importers should be divided in two parts: First, their list in alphabetical order and by country; and, second, a list by product or product groups. It would be useful if CAEU's Trade Directory could be published in three languages – Arabic, English, and French, – in order to serve trade expansion between member countries as well as on world markets.

— *Translation* in Arabic of appropriate trade promotion publications, market research studies, and books on export promotion techniques, etc., among them those prepared by the International Trade Center UNCTAD/GATT.

III. DESCRIPTION OF ACTIVITIES AND THEIR APPLICATION OVER 1975/1978

	Activities	Location	Duration and Starting Date
1.	<u>ORGANIZATION</u>		
	– Setting up of two units in the Export Promotion Section: The Trade Information and Documentation Unit and the Marketing Research and Joint Promotional Activities Unit	Cairo	As soon as possible (not later than June 1975)
	– Creation of one more unit in connection with Training	Cairo	Beginning of 1977
2.	<u>TRADE INFORMATION AND DOCUMENTATION</u>		
	(a) <u>Acquisitions</u>		
	– Systematic collection of data, documents and periodical publications concerning foreign trade in general (reference unit) and CAEU's export promotion in particular	Cairo	As soon as possible and continuous
	– Contacts with national organizations of member countries issuing publications of interest for trade promotion in the region, requesting them to send their documents free or, in the future, in exchange for CAEU publications and documents	Cairo	As soon as possible and continuous
	– Identification of other sources of information, establishment of contacts with them and acquisition of their publications	Cairo	As soon as possible and continuous
	(b) <u>Retrieval and Analysis</u>		
	– Adoption of the classification system for trade documentation being developed by ITC	Cairo	Autumn 1975 and continuous
	– Cataloguing, retrieval and analysis of documents and publications	Cairo	Autumn 1975 and continuous
	– Establishment of bibliographical cards and their dissemination in the region through the Monthly Bulletin	Cairo	Autumn 1975 and continuous

contd.

III. DESCRIPTION OF ACTIVITIES AND THEIR APPLICATION OVER 1975/1978 (contd.)

Activities	Location	Duration and Starting Date
– Setting up a system of files per product or product group	Cairo	Autumn 1975 and continuous
– Setting up a system of files on individual markets of the region and, eventually, on most important world markets	Cairo	Autumn 1975 and continuous
- Establishment of files on:	Cairo	Autumn 1975 and continuous
(1) Organizations and enterprises dealing with export promotion in the CAEU region		
(2) Main importing enterprises or organizations in the CAEU region		
(3) Main importers of the region's essential export items on selected world markets		
Setting up a system for the distribution of documents and information to CAEU General Secretariat's staff and other potential users	Cairo	Autumn 1975
(c) <u>Dissemination of Information (see under publications)</u>		
(d) <u>Assistance to Member Countries</u>		
– Assistance in setting up or strengthening national trade information and documentation centers in member countries of the CAEU region	Cairo and region	Beginning 1976
– Assistance in the coordination of adopted concepts and classification systems in member countries	Cairo and region	Beginning 1976
3. <u>PUBLICATIONS</u>		
– Monthly Trade Information Bulletin which is to include in each issue the reproduction a number of bibliographical cards in order to disseminate documentary practices in the region	Cairo	Beginning 1976
– CAEU Trade Directory	Cairo	Spring 1976
– Translation into Arabic of appropriate trade promotion publications, etc. prepared by ITC/UNCTAD/GATT	Cairo	As soon as possible

contd.

III. DESCRIPTION OF ACTIVITIES AND THEIR APPLICATION OVER 1975/1978 (contd.)

	Activities	Location	Duration and Starting Date
4.	MARKET RESEARCH AND MARKET DEVELOPMENT ACTIVITIES		
(a)	<u>General Studies</u>		
-	Analysis of member countries' exports	Cairo	Spring 1975, updated each year
-	Analysis of member countries' imports	Cairo	Spring 1975, updated each year
-	Market studies:		
	(i) Arab Republic of Yemen, Kuwait, United Arab Emirates, Sudan	Cairo	1975
	(ii) Egypt, Syria, Jordan, Iraq, Libya, P.D.R. of Yemen, Somalia	Cairo	1976
(b)	<u>Market Research Studies</u>		
-	Product/commodity Studies:		
	(i) 3 studies of selected export products or product groups of the region	Cairo and region	1975
	(ii) 5 product/commodity studies	Cairo and region	1976
	(iii) 5 product/commodity studies	Cairo and region	1977
	(iv) 3 product/commodity studies	Cairo and region	1978
-	Market research studies:		
	(i) Two market research studies, for a product or product group, studied in 1975, in 3 or 4 member countries of the region;	Cairo and region	1976
	(ii) Two market research studies, for a product or product group, studied in 1976, in certain member countries of the region	Cairo and region	1977

contd.

III. DESCRIPTION OF ACTIVITIES AND THEIR APPLICATION OVER 1975/1978 (contd.)

Activities	Location	Duration and Starting Date
(iii) One market research study, for a product or product group, studied in 1977, in certain member countries of the region	Cairo and region	1978

MARKET DEVELOPMENT ACTIVITIES

(i) One market development project for a selected product or product group	Cairo and region	1976
(ii) Two market development projects for selected products or product groups	Cairo and region	1977
(iii) One market development project for a selected product or product group	Cairo and region	1978

6. JOINT MARKETING ACTIVITIES

(a) Creation of joint marketing ventures:

- One joint marketing venture for a group of products	Cairo and region	1976
- Two joint marketing ventures for selected groups of products	Cairo and region	1977
- One joint marketing venture for a group of products	Cairo and region	1978

(b) Organization of trade missions for exporters from member countries to other member countries, possible importers of their products:

- Organization of two mission	Cairo and region	1976
- Organization of two mission	Cairo and region	1977
- Organization of two missions	Cairo and region	1978

contd.

III. DESCRIPTION OF ACTIVITIES AND THEIR APPLICATION OVER 1975/1978 (contd.)

	Activities	Location	Duration and Starting Date
(c)	Participation at trade fairs :		
-	Organization of joint participation of CAEU member countries' producers of the same product or product groups at a general fair or specialized exhibition of the region	Cairo and region	1976
-	Organization of joint participation at two fairs or specialized exhibitions under the same conditions as above	Cairo and region	1977
-	Organization of joint participation of CAEU member countries producers of the same product or product groups at a general fair or specialized exhibition of the region	Cairo and region	1978

7. TRAINING

(a)	Assistance in developing an export drive in member countries:		
-	Large-scale conference on export promotion	Cairo and region	Fall 1975
-	Two seminars (or symposia) on specific problems of trade promotion, e.g., trade information or market research	Cairo and region	One in 1976 and one in 1977
-	Two seminars (or symposia) on a specific product or group of products of interest to member countries	Cairo and region	One in 1976 and one in 1977
-	Follow up symposium to review developments in the CAEU region and discuss future activities	Cairo and region	1978
(b)	Training of the personnel in charge of trade promotion and export marketing activities within the General Secretariat of CAEU	Cairo	1975/1976
(c)	Initiation and organization of training programs for the personnel, at all levels of responsibility, working in the field of trade promotion	Cairo and region	1976
(d)	Assistance in strengthening, at national level, of programs of selected teaching institutions in the international trade field	Cairo and region	1977/1978

IV. BASIC REQUIREMENTS

1. STAFF

At its initial stage, the Export Promotion Section of the CAEU General Secretariat will consist of two units: Trade Information/Documentation and Market Research and Joint Promotional Activities. The minimum basic requirements in full time personnel will be as follows:

Head of the Section

(a) *Trade Information and Documentation Unit*

- Two documentalists for acquisitions and loans, and for establishing files per product, per country and per individual exporters and importers
- One trade information specialist for the Monthly Trade Information Bulletin
- One trade information specialist for the Trade Directory of CAEU

(b) *Market Research and Joint Promotional Activities Unit*

- Two marketing research analysts

(c) *Training*

- One training officer should be recruited as soon as possible in order to (i) participate in the organization of symposia, etc. and (ii) constitute a nucleus for the creation of the forthcoming training unit

(d) *Secretariat*

- Two full time secretaries of whom one should be bilingual English-French.

2. LOGISTIC SUPPORT

(a) Adequate space for the Export Promotion Section as a whole should be provided and, particularly, for the Trade Information/Documentation Unit. According to the experience of ITC the Trade Information/Documentation Unit requires around 200 m².

(b) Equipment required will include IBM golf ball typewriters, photocopying machines, machine for binding printed material, offset machine, addressograph machine, minigraph and Recordak, audio-visual aids, etc.

3. PROPOSAL FOR TECHNICAL ASSISTANCE

With a view to assisting in the implementation of CAEU's work program in trade promotion, technical assistance may be needed in the fields of trade information/documentation, marketing research and training of personnel. This assistance would be given to the Export Promotion Section in developing its basic activities, but, at a later stage, some specific assistance could also be foreseen, for example in market development projects for specific products in member countries or advice in all aspects of marketing to exporters.

The long-term objective of the assistance would be, first, to foster intra-regional trade, and, second, to develop CAEU member countries' trade with overseas markets.

The immediate objectives would be to assist CAEU's General Secretariat in strengthening of its Export Promotion Section, in the implementation of the work program and in training specialized staff in the region.

Activities undertaken in the framework of technical assistance would be:

- (a) In the field of market research a market analyst will be required who would act, at the same time, as project coordinator (duration 36 m/m).
- (b) Trade information/documentation specialist (duration 24 m/m)
- (c) Documentalist (duration 12 m/m)
- (d) Marketing consultants on specific products and/or marketing techniques (duration 12 m/m)
- (e) Study tours (six on the total, each of 2 months) in trade information and Documentation and export marketing techniques
- (f) Provision of documentation and some equipment.

ANNEX FIVE

Note on the CAEU Information and Documentation Centre to Be Created As Soon As Possible

Preliminary Remarks

It is evident that in the fulfillment of CAEU's tasks in general, and of those of its Trade Department and its Export Promotion Section in particular, the creation of an Information and Documentation Centre appears to be an urgent need. The setting up of this Centre should be considered as a high priority and a *sine qua non* condition for the successful realization of the organization's objectives.

It is also clear that CAEU's Information and Documentation Centre should embrace all the matters of interest to the organization and serve all its departments and services. However, the present note concerns mainly the trade and export promotion aspect of the proposed Centre which should become an indispensable tool for those working in the above mentioned fields. It will be possible to adjust and complete it easily according to the needs and advice of the various other departments.

A. THE NEED TO CREATE A TRADE INFORMATION FLOW AND A TRADE INFORMATION SYSTEM IN THE CAEU REGION

Trade promotion and export development rank among the priority objectives of the countries of the CAEU region. It has been widely recognized and demonstrated that the proper collection, analysis, organization, retrieval and dissemination of trade information and commercial data are basic and essential for all trade and export promotion work whether at national, intra-regional or international level.

The need for reliable and up-to-date market and trade data and information has also been evidenced to enable formulation, at national and regional levels, of trade policies and export strategies as well as to foster commerce among the member countries of the region. A well-functioning regional trade information system might be, through facilitating intra-regional trade development, a powerful element in the area's economic integration. In respect of trade with industrialized or developing countries outside the region, regular trade information would usefully assist governments of member countries as well as CAEU's General Secretariat in regional and international trade negotiations and help exporters in the identification of new or improved market opportunities and market development requirements.

In this perspective, the four main objectives of CAEU's action may be described as follows:

(a) The setting up or strengthening of national trade information and documentation centers that would enable individual members countries to meet their national export promotion objectives and take advantage of new sales opportunities as well as to contribute to and benefit from the flow of trade information in the region.

(b) The co-ordination of classification systems and concepts adopted by the national centers so as to make possible and facilitate co-operation and mutual assistance.

(c) The training, including in-service training, of the necessary specialized personnel at regional level.

(d) The building up and gradual strengthening in terms of facilities and trained personnel of CAEU's Trade Information and Documentation Centre which should be the focal point of the region's trade information system. It may also constitute the necessary basis and training ground for demonstration purposes as well as for in-service training whenever CAEU will request in the future international assistance and specialized advisory service related to trade information and documentation.

Although the four objectives were enumerated in a logical order, it must be clear that the creation of CAEU's Trade Information and Documentation Centre is of the highest priority because it might stimulate, through the demonstration effect, the setting up of national trade information and documentation centers or services where trade or export promotion institutions exist. These national organizations will be then the natural correspondents of CAEU's Centre.

In the meanwhile, and awaiting the coming into existence of its national counterparts, CAEU's Information and Documentation Centre will need a network of correspondents in each country: Governmental departments or other public administrations and bodies, chambers of industry and commerce, professional or trade associations, etc.

It would be preferable that in each of the organizations, public or private, an official should be personally designated, for example as liaison officer with CAEU, who would supervise and co-ordinate information activities and secure that all pertinent information or document reaches the General Secretariat in Cairo in due time.

B. THE GRADUAL BUILDING-UP OF CAEU'S TRADE INFORMATION AND DOCUMENTATION CENTRE

1st PERIOD (six months)

1. Control and analysis of the existing documentation
2. Acquisition of documentation and periodical publications.
3. Selective dissemination of information.

1. *Control and Analysis of Existing Documents*

— Recruitment of an economist who should be responsible for the analysis, the classification, the retrieval and dissemination of trade information. This person should know, in addition to Arabic, English and French in order to be able to analyze the contents and to proceed with the retrieval of information in these three languages;

— Complementary training for the person in charge, at present, of CAEU's documentation, Miss Nimrene, perhaps through participation in a specialized training course of the International Trade Centre (ITC) or any other organization in the field.

2. *Acquisition of Documentation and Periodic Publications*

On the basis of "interest profiles" which are to be established by the primary users of the documentation, e.g., CAEU officials, and with their assistance, the economist has to produce the list of documentation and periodic publications to be acquired by the Information and Documentation Centre (see the photocopy of reference cards of ITC put at CAEU's disposal by the Senior Trade Promotion Consultant).

In order to accomplish this work, a tri-lingual secretary should be attached to the Centre who would type, classify and keep updated the correspondence and orders, should they be directly or through ITC's corresponding services. This person should be also in charge of the preparation of lists and specific bibliographies, and of typing of the text of the information bulletin written by CAEU's various officials and the Center's collaborators.

3. *Selective Dissemination of Information*

As soon as the analysis of current trade information is sufficiently advanced, a selective dissemination of data and other pertinent information could be started. It should be based, on the one hand, on the "interest profiles" elaborated with the assistance of CAEU officials, and addressed to them; on the other hand, based on the preliminary work accomplished by the Trade Department and the Export Promotion Section (export/import analysis, joint marketing activities, marketing problems, etc.), the dissemination of information in member countries, – Governmental departments, public sector enterprises, the business community and its representative bodies, – should be undertaken as rapidly as possible.

In the first case, each CAEU official would receive all pertinent information relevant to his work: press cuttings or photocopies of articles, bibliographical references of interest to him, periodic list of acquisitions of the Centre, and so on.

The dissemination of information to the public and private sectors as well as administrations of member countries could be done through a periodical publication (even mimeographed); at the beginning a monthly trade information bulletin would suffice. At a later stage, the bulletin might be also sent to countries outside the region, international or other regional organizations. In this way, it will become a precious tool of exchange of documents with relevant institutions.

This bulletin would include detailed analysis of the trade integration process in the CAEU region, new developments concerning international trade (changes in customs tariffs or export/import regulations in member countries as well as in target markets outside the region, news concerning foreign demand and export/import/retail prices); market and product profiles; articles on marketing techniques, and, possibly, if news are enough recent, as the trade information flow is already well established, individual demands for the region's main export products, should they come from member countries or from world markets.

It is to be emphasized that in the articles on the region's export products (product profiles), quantitative and qualitative information concerning their supply should be included; this type of information could be most useful to commercial attaches or other economic or trade representatives of member countries posted abroad facilitating their prospective work in their respective areas. These attaches or representatives could assist, in return, CAEU's Trade Information and Documentation Centre procuring to it information on the markets they cover such as import demand, competition distribution channels, prices, and so on.

2nd PERIOD (6 months)

In addition to the activities initiated during the first period, which should be continued and completed, some new, important aspects of the Information and Documentation Center's work could be started:

1. Establishing contacts with, and creating a region wide cooperation between, existing national economic/trade information and documentation centers; stimulating their creation in those countries where they do not exist.
2. Progressive elaboration of unified concepts and systems of analysis, retrieval and dissemination of information; initiation of exchange of acquisition lists, of catalogue cards, etc. among member countries' relevant institutions.

These two activities would prepare and facilitate those of the third period.

Consequently, recruitment of a second economist will be needed whose main tasks should consist of:

- Collaboration in the analysis and retrieval of in-coming information, preparation of files, of resumes, etc. and answering to questions on trade and export data or any other pertinent information, which might be asked of the Centre by national services, joint marketing corporations or member countries' public or private sectors.
- Cooperation in activities described in point 2 above.
- Participation in the selective dissemination of information and the publication of the bulletin.

3rd PERIOD (12 months)

Establishment of an Economic and Trade Information Network

It seems necessary that an expert in trade information should be sent to member countries of the CAEU region to undertake a detailed inquiry concerning the information and documentation centers or services which might participate in the information network, analyzing their systems of collection, analysis, organization, retrieval and dissemination of information, and explore the possibilities to evolve a “common language” among them. He should be able to make concrete proposals and practical recommendations in view of the unification and integration of economic and trade information among CAEU member countries, including the utilization of some descriptors by all the analysts of information.

The work of this expert might take 5-6 months and should be focused in a first phase on the foreign trade and industrial sectors. By no means would this mean that the other sectors of the economy would be neglected, but the priority given to these two sectors would permit tackling the most urgent tasks and proceed gradually with the integration of trade information in the region.

One of the essential aspects of such a regional co-operation will be, without doubt, the exchange between member institutions of acquisition lists (books, documents and periodic publications) and, later, the publication and regular updating of a CAEU catalogue, based on a common classification system and a standardized terminology. In this way, each member of the information network would know what documentation and sources of information are available at the General Secretariat and in the information and documentation centers of other institutions.

It is to be mentioned that the realization of the above mentioned objective, e.g., exchange of acquisition lists could be easily done if CAEU's Information and Documentation Centre would use the machine called MIMIGRAPH which can reproduce an unlimited number of catalogue cards. The latter could then be sent, preferably each week, to the network's member institutions.

Another useful technical facility could be a machine producing micro-cards (Recordak) of all important trade information received by CAEU's Centre, on the condition that the member or affiliated institutions or services would possess the necessary equipment for their reading or reproduction.

C. ESTIMATED BUDGETARY REQUIREMENT IN US DOLLARS

1st period

Personnel

One economist

One librarian/documentalist

One secretary (tri-lingual and translator)

Acquisitions

Publications	10'000
Furniture	2'720
Equipment: 1 IBM executive typewriter and Minigraph	1'400
Other supplies	1'400
Cost of publication and diffusion of the Bulletin (six issued)	2'000
Sub-total: Publications and acquisitions	17'520

2nd period

Personnel

One economist

Acquisitions

Publications	10'000
12 shelves for the library	2'200
Recordak	2'000
Cost of micro-cards	500
Cost of publication and diffusion of the Bulletin (six issues)	2'000
Sub-total: Publications and acquisitions	16'700

3rd period

Personnel

One information specialist, network co-coordinator

One secretary for the information specialist

Acquisitions

Publications	20'000
Micro-card service for users in eleven countries of the region	5'000
Other supplies	4'000
Cost of publication and diffusion of the Bulletin (twelve issues)	12'000
Travel costs in the region	15'000
Communication costs of the information network	5'000
Sub-total: Publications, equipment and sundry	61'000
Grand total for twenty four months	95'220

NOTE

Salaries are not specified and are at the discretion of the Secretary General in accordance with the salary scale in CAEU's Secretariat.

LIST

of Subjects (or Type of Information) What the Information/Documentation Centre Should Have

First Concerning CAEU Member Countries, Later on Most Important Markets

1. Plan or program of development
2. Laws and decrees in the field of trade
3. Investment laws
4. Monetary policies
5. Exchange control
6. Publications of central banks
7. Foreign trade regulations and publications (official gazettes, official bulletins of foreign trade, etc.) which would make possible their updating
8. National standards: sanitary regulations, special regulations concerning, for example, transport of specific products
9. Customs regulations and tariffs
10. Trade agreements
11. Statistics of:
 - Foreign trade (yearbooks for the last five years and monthly, trimestrial, semestrial publications of the current year)
 - Industrial and agricultural production
 - Transport
 - Economic indicators
 - National accounts
 - Balance of payments

12. Description of the national trade promotion organization, if any, and subscription to its publications

13. Information concerning other institutions of the public or private sector which have any responsibility with respect to trade promotion

14. Transport and transit facilities existing in a country

15. Importers' or exporters' directories; directories of exporters' associations as well as of professional (industrial) associations; classified telephone directories, etc.

ANNEX SIX

Program Aiming at the Creation of Export Awareness Among Officials and Representatives of the Business Community of the CAEU Region 1975–1977

1. October–November 1975 (at least two weeks after the end of Ramadan):

Several six days meetings with as large participation as possible from the member countries of CAEU, including Government officials, representatives of public institutions, chambers of commerce, industry and agriculture, professional associations, and personalities representative of an important segment of the business community in their respective countries.

(Condition: To have accumulated the material for the Directory of Exporters/Importers of CAEU member countries which will constitute a basis for the invitation of representatives of associations and of the business community and which, at the same time, should be submitted, in a multicopied form, to the participants of the Conference for final checking and approval.)

The program of these Conferences should be divided into two parts:

- (i) Export promotion in general – Principles and techniques
- (ii) Realities and possibilities – Development of intra-regional trade, e.g., exports from member countries to other members through substitution of imports from extra-regional sources by those originating from the region.

All exposes should be followed by a discussion.

FIRST DAY

MORNING

Opening speech by the Secretary General of CEAU: Objectives of regional policies of coordination in the field of trade promotion

Break

Program Briefing

1st expose

PRINCIPLES, CONCEPTS AND OBJECTIVES OF EXPORT PROMOTION

- Why should the Government be involved?
- The organization of export promotion
- The institutional framework

AFTERNOON

General discussion: Existing structure of export promotion in the CAEU region (who does what?)

(This might be a panel discussion composed of representatives of individual member countries each having around 20 minutes to expose its present situation in his country)

Needs highlighted in the discussion

Role of the CAEU

SECOND DAY

MORNING

2nd expose

ROLE OF THE GOVERNMENT IN THE EXPORT DRIVE

- Creating an export climate
- Fiscal and non-fiscal incentives, including export credit or export credit insurance
- Simplification of export procedures
- Elimination of disincentives to export

3rd expose

COMMUNICATION IN THE FIELD OF EXPORT PROMOTION WITHIN A COUNTRY, WITHIN THE REGION AND WITH WORLD MARKETS

- Relationship between the Government and the public sector
- Relationship of the administration with the business community
- Relationship with trade representatives abroad
- Relationship with foreign governmental agencies, professional associations and business community representatives

AFTERNOON

General discussion: Incentives given by Governments of CAEU member countries to exporters (panel as before)

Communication problems in the region

Need and use of representatives abroad by exporters of CAEU member countries

THIRD DAY

MORNING

4th expose

TECHNIQUES OF EXPORT PROMOTION

- What does an exporter need?
- What assistance should be expected from a national or regional export promotion organization?
- What support can a national or regional export promotion organization provide in:
 - (a) Trade information/documentation
 - (b) Marketing
 - (c) Market research
 - (d) Promotion (trade fairs and specialized exhibitions, publicity, etc.)

5th expose

A CASE STUDY: ORGANIZATION AND ACTIVITIES OF A WELL-FUNCTIONING EXPORT PROMOTION ORGANIZATION (for example, Ireland)

AFTERNOON

General discussion: Needs and requirements of exporters of the public sector or of the private business community in the field of export promotion (panel as before)

Needs and requirements by sector:

- (a) Agriculture and foodstuff
- (b) Mineral products and derivatives
- (c) Petrochemicals and other processed oil products
- (d) Manufactured products (textiles, light industries, etc.)
- (e) Handicraft products

FOURTH DAY

MORNING

6th expose

PLANNING AND WORK PROGRAM FOR AN EXPORT PROMOTION ORGANIZATION

- Objectives
- Activities
- Work Program
- How to use it

7th expose

THE COUNCIL OF ARAB ECONOMIC UNITY AND ITS EXPORT PROMOTION ACTIVITIES

- Objectives
- Activities
- Work program, e.g., the regional trade promotion program
- How to use it

AFTERNOON

General discussion: Promotion of exports in the region (panel as before)

- Development of intra-regional trade: possibilities and obstacles
- Promotion of exports to world markets: possibilities and obstacles

FIFTH DAY

MORNING

Discussion continued: Promotion of the exports of the region

AFTERNOON

Working group composed of representatives of various sectors and countries as well as of international consultants to prepare a positive paper for submission to the Conference

SIXTH DAY

MORNING

Closing session: Review of procedures and recommendations

Closing speech of the Secretary General of CAEU

Conclusions

ANNEX SEVEN

Resume of the Program for Symposia (1975–1977)

I. The CAEU could organize in the course of each of these years two symposia on specific problems of export promotion with a much more limited participation than for the first large-scale meetings aiming at the creation of export awareness (not more than 2-3 participants per member country).

The subject of these various symposia could be:

1. Market Information/Documentation
2. Market research and market prospecting
3. Role of invisibles in the foreign trade in member countries' balance of payments (transport, insurance, etc.)
4. Promotional means in a strict sense (fairs and exhibitions, publicity, merchandising, etc.)

Each of these symposia might be organized in another member country, but with the participation of representatives of all member countries.

It would appear reasonable to organize these symposia just in the following countries (with special interest to create export awareness in the least developed countries of the region):

- Sudan
- Yemen, D.P.R.
- United Arab Emirates
- Somalia

II. Another possibility would be to organize symposia in the course of the next couple of years in these same least developed countries of the region on their export promotion problems; but then the participation should be limited to representatives of the Government, public institutions and business community of the country concerned.

In this sense, the following program may be suggested:

- Export potential of the country
- Marketing problems met by the exporters: quality, price, packaging, promotion
- Market diversification and market research
- Trade missions and contacts, etc.

In view of the integration drive of the CAEU, the first approach seems to be preferable because it would take together representatives of different countries – officials or businessmen – to discuss systematic problems of trade promotion.

ANNEX EIGHT

Perspectives of Training Program Activities of the CAEU in the Field of Trade Promotion (1976–1977)

It would not appear advisable that CAEU should undertake training activities in the course of 1975, especially before the large-scale Conference which is to create more export awareness between officials and businessmen of the member countries. In addition, the Export Promotion Section of CAEU's Trade Department could prove during the present year the usefulness of its activities (Directory of Exporters/Importers of the countries in the region, some market studies, etc.) and thus demonstrate the need for training people in the member countries who then might be its correspondents, speaking the same language of "marketing" and securing to it good communication channels.

As from 1976, CAEU might set up yearly programs of training in cooperation with the Training Department of ITC/UNCTAD/GATT, organized in various capitals of CAEU member countries with, eventually, some market prospecting trips in Western Europe or Socialist countries included in the program.

The ITC/UNCTAD/GATT might give assistance in training on five different levels:

- Basic training in marketing for middle-level executives and officials (basic concepts, techniques of market research, pricing, promotional means, etc.);
- Training for trade representatives abroad (in addition to the subjects enumerated above, the course would comprise special subjects as, for example, organization of a trade representative's office, organization of trade missions, etc.);
- Training for businessmen dealing with foreign importers, participating at international fairs and specialized exhibitions, suffering of international competition as far as pricing, packaging or other aspects of their trade are concerned related to the marketing mix;
- Training for high-level executives, – people in the sphere of decision-making, – to influence their attitude towards, and improve their skills in trade promotion techniques and activities at the institutional level; to demonstrate the most effective trade promotional techniques applicable at governmental level and to study the application of modern organizational, management and motivational methods in the trade promotion field;
- Training of instructors who would create a multiplier effect through disseminating knowledge in basic trade promotion and marketing techniques in their respective countries.

It appears reasonable that CAEU organizes two training programs per year as of 1975, in cooperation with ITC/UNCTAD/GATT, according to the needs identified and according to the program outlined above.

The training of instructors in basic trade promotion and marketing techniques seems to have, however, the highest priority in view of the lack of skilled middle-level officials and executives in the region. Therefore, it may be foreseen that during the year 1975 two courses for instructors be organized by CAEU for participants from member countries, each one being organized in another capital.

As from 1977, other training program could be organized, especially for decision-making executives or for trade representatives abroad.

ABOUT THE AUTHOR

Born in Hungary, he left the country after the 1956 Revolution. Victor Segesvary worked during twenty-five years with the United Nations in the field of economic and social development. His experiences in Asia and Africa familiarized him with the existence of different human worlds and taught him the necessity of understanding and tolerance in human relations.

He obtained a PhD in Political Science and International Relations from the Graduate School for International Studies, and a D.D. from the Faculty of Protestant Theology, both at the University of Geneva (Switzerland). His vast knowledge covers such diverse fields as political science, sociology, economics, history, and philosophy as well as the "new" science of comparative analysis of civilizations. He published many books and articles, among them *Inter-Civilizational Relations and the Destiny of the West. Dialogue or Confrontation?* reflecting his lifelong experience in the interface of great civilizations; *From Illusion to Delusion. Globalization and the Contradictions of Late Modernity*, linking the phenomenon of globalization to the dialogue of civilizations; as well as *Existence and Transcendence. An Anti-Faustian Study in Philosophical Anthropology*, exploring the relationship between biological and cultural developments. Victor Segesvary is chronicled in Marquis' WHO IS WHO IN AMERICA and WHO IS WHO IN THE WORLD.