Folder Title:	United Nations Agencies Liaison Records - International Labour Office [ILO] - Volume 2
Folder ID:	30381451
Series:	Liaison with external organizations
Dates:	01/17/1985 - 03/06/1986
Fonds:	Records of the Office of External Relations
ISAD Reference Code:	WB IBRD/IDA EXT-08
Digitized:	2/16/2021

ILO #2

INTERNATIONAL LABOUR OFFICE

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Project Outline for a Study of Public Service Pay in Africa

Objective

The objective of this study is to produce a compendium of information on pay practices in the public services in Africa which will provide those responsible for decision-making with an account and analysis of methods, systems and results of public service pay determination. An analysis and comparison of experiences in a number of different countries will offer a framework within which decision-makers will be able more effectively to adapt their existing practices to the two main objectives of budgetary control and the need to recruit and retain a well-motivated efficient public service.

Background

The public service - limited for the purpose of this study to employees of central government administration engaged in non-commercial activities - is an important sector of employment in all developing countries and one that often raises special problems. Many of these are linked to the dual role governments must exercise with respect to public sector pay and employment. First, is the role of an employer responsible for motivating its workers and determining, by whatever process, the numbers and terms and conditions of employment of public service employees. This may be seen as the 'employment management' function. Second, there is the responsibility government must accept for the economic management of the country. The financing of the level of expenditure on public service employment inevitably is a major issue of economic policy. This 'economic management' function often requires Government to consider factors different from those relevant to the employment management function.

Employment management

Governments must take administrative decisions about the number of public service employees, the types or categories to be employed, the level of pay they are to receive, the system for periodically adjusting pay and the processes by which employees are recruited, graded and promoted.

In all countries the public service is characterised by strong internal labour markets. Recruitment takes place in certain grades and promotion from within is an established and expected feature of employment. Public service employment usually has two additional common characteristics. First, the payment system is based on grades with salary scales which contain some provisions for periodic increments. Second, there is normally high security of employment. Also in most countries recruitment for all but the lowest grades is on the basis of merit or competition although special provisions may exist to ensure a desired balance among ethnic or regional interests and in some cases all applicants with specified qualifications are offered employment somewhere in the government service.

It is necessary therefore for Government to determine by some process or other (unilaterally, after consultation or collective bargaining, or after considering the examination and report of some special body) not only current terms and conditions of employment for public service employees but also the procedures and systems for recruitment, promotion and for fixing the numbers employed. While these may all be seen as typical employment management requirements, undertaken by the Government rather than, for example, a private employer, the very fact that they have to be done by Government injects a political dimension into the decisions which is not present in the private sector. Some governments may have taken employment management decisions because of their political effects. For example the decision to guarantee employment to all applicants with certain qualifications may be an example of the predominance of political considerations in what would elsewhere, or in other circumstances, be a straightforward employment management decision.

The development of strong internal labour market features in public service employment, the use of incremental scales and expectations of promotion, may contribute to morale and efficiency. Other factors outside the scope of this study, such as the type of general organisation, the prevailing customs and attitudes to government employment, the skill of supervision, the extent of personal or political centralisation of decision-taking and social values regarding the customary behaviour of public servants may exert a powerful influence on the efficiency and competence of the public service as well. However, features of payment, grading and promotion systems can be expected to exert important independent influences within the framework created by these factors and many exert influences which over-ride them.

Requirements for types of skills different from those associated with administrative, executive and clerical functions which have traditionally formed the larger part of public service employment have led to a greater demand for a wider range of skills and more technically and professionally qualified staff. In addition the extension of government into areas of activity not previously within their ambit has increased yet further the number and categories of public service employees.

The changing skill requirements have occurred in the framework of employment relationships and pay and promotion provisions which were not necessarily well-suited to deal with the new trends. Developing countries generally suffer a shortage of skilled personnel. There may be acute shortages of experienced technicians, scientists and other professional groups. The public service, while isolated from product market forces, is subject to external labour market pressures. It must recruit and retain employees in the face of competition from other employers, and while in many developing countries these may often consist to a significant extent of employers in other parts of the public sector, differences in pay and other conditions of employment may create extreme difficulties for Government as an employer.

While external economic pressures may create particularly acute recruitment and retention problems for specific occupations which are in short supply, if the general level of public service pay and benefits compares unfavourably with those in other employment there may be a widespread decline in morale and performance. There may be situations when the employment management function would encourage a positive improvement in public service pay in order to improve the quality of employees and their performance. Recruitment practices, promotion, and performance assessment as well as pay systems, pay levels and relative pay developments can all influence the quality of public administration which, in turn, may have a direct effect on economic development. As has been observed:

"Money properly and efficiently invested in expanding and improving the civil service for the purpose of furthering economic development gives a

return as direct and in many ways more certain than investment in factories and roads."
[United Nations, ~~Handbook of Civil Service Laws and Practices~~, (New York, 1966, Sales No.66.H.4.2) p.7].

Thus, the employment management function of central government may have consequences extending beyond those usually associated with internal management decisions. At the same time actions by Government in its role of employer may have wide external repercussions because of the size and importance of public service employment or because the public service is seen by other employers as providing a lead in changing terms and conditions.

There may therefore be connections and inter-actions between public service employment and the external labour market in two directions. External labour market conditions may make it difficult for the public service to recruit or retain a satisfactory workforce, and public service pay and conditions, or changes in them, may generate imitative behaviour or initiate a process of coercive comparisons which add to the inflationary pressures in an economy without changing relative wages.

Governments may adopt some system of pay comparability as the basis for determining the level of pay of public service employees. This may be regarded as reconciling the internal and external labour market objectives by establishing pay levels and pay relationships which reflect those determined in other employments, which, in some cases, may be the result of the inter-play of both product and labour market forces. However in many developing economies the public sector in one form or other may dominate external employment, and terms and conditions there may themselves be subject to government determination in one form or another. In these circumstances comparability may appear less attractive and governments may have little alternative in the long run than to resolve the problems of employment management on the basis of some consistent set of rules.

Economic management

While the adoption of a system of pay determination based on comparability with outside employment may appear to meet the need to establish pay levels which are fair to employees, meet labour market requirements by establishing pay levels which, on average and subject to some time-lag, are the same as those determined by market or institutional forces operating in other areas of employment, and provide some reassurance to taxpayers that public service salaries are not excessively high, it may nevertheless lead to a conflict between the objectives of employment and economic management. All governments are required to accept responsibility for general economic development, and many governments of developing countries have as a matter of policy sought to extend the area of government responsibility into areas which might not in the past have been, or are currently elsewhere regarded as, concerns of central government. The level of public service pay and its possible effects on external labour market conditions, and the size of the total public service pay-bill, inevitably impinge on governments' general economic policies.

The public service cannot have its pay and employment levels determined by forces emanating from product market sources as there is no product market for its output and services. Those advocating greater reliance on product market forces as the main stimulus to economic adjustment may be inclined to seek a reduction in public service employment or the total wage bill, as a contribution to the adjustment processes. Such reductions can free resources which might make an improved economic contribution elsewhere, and a reduction in the level of government taxation or borrowing might provide a stimulus to economic activity in other sectors. However, there can be no predisposition regarding the level of government expenditure on the public service. As the UN study mentioned above stated, the public service can make a positive contribution to economic development.

The perceived need to control the total pay-bill and therefore reduce the call upon government funds may lead some governments to impose severe restraints on increases in public service salary scales. There is already evidence available that in a number of developing countries such restraint, in association with inflation, has resulted in drastic reductions in the real value of public service salary scales. In some cases, this may have been in part the consequence of a government decision to expand the numbers employed. In these cases, governments may have adopted some form of a modified wage-fund or 'government revenue fund' approach so that the total pay-bill is regarded as fixed or determined by some other variable such as total government expenditure or revenue. Regard to economic management factors may have led to the adoption of policies which have had adverse effects on motivation, performance and the quality of public service employees, thereby acting contrary to the requirements of well-developed employment management policies. The responses of those responsible for employment management policies when faced with constraints determined by and imposed for economic management reasons might reduce or nullify the economic management objectives and create additional albeit longer-term problems for employment management.

As has been suggested above, the quality of public administration might have been affected so adversely as to seriously imperil the government's economic management and development policies. Even if the situation has not deteriorated to this extent, there may have been modifications of pay and employment practices in the public service which have undesirable consequences for both employment and economic management.

System adaptation to constraints

The imposition of constraints on pay or employment levels will generate reactions from both managers and employees. Most personnel managers can then, for good reasons, be expected to respond to these pressures by seeking to modify the application of those constraints or by adapting established practices and systems in order to reduce what are seen as unduly irksome or undesired restrictions. Public service personnel managers are no exception to this generalisation. If there are constraints on increases in pay scales in some sectors, both internal labour market pressures on recruitement and retention, and perceptions of fairness, will encourage measures to provide pay increases on an individual or personal basis to replace the general increases which might have resulted from an upward revision of salary scales. This may lead to an increase in numbers promoted to higher-grade and higher-paid posts, or to an increase in the numbers receiving 'merit' pay or allowances where such arrangements exist. There may be a shift in the grade composition of the total workforce which is not primarily determined by a change in the work composition or the result of an objective re-assessment of work levels and requirements. Such 'grade creep' is a fairly common response to tight control of salary scales and levels in many organisations in both the public and private sectors.

Other responses may include the extension of existing allowances to employees who did not previously qualify for them, increases in rates of allowances, or the introduction of new ones. Even if the public service has adopted some of these devices to some extent, thereby increasing the burden of economic management, it may still be the case that public service employees are undergoing more drastic reductions in real living standards than other sections of the workforce. Phoney promotions, improved or extended allowances and the provision of other fringe benefits may proceed at a faster rate in other employment.

The grading system, promotion and re-grading provisions, incremental scales, and the payment of allowances, form an inter-connected set of relationships with the general levels of salary scales and revisions to them, which can be expected to respond to pressures on any part of the complex whole. Attempts to control one feature of the inter-connected relationships will frequently lead to adaptive responses elsewhere in the total system. As the strength of a chain depends on its weakest link, so the effectiveness of the control over one element of pay and grading, and changes in them, depends on the effectiveness of the control over every part of the related whole. The pay, allowances and grading rules and practices in an area of public service employment should therefore be regarded as a living organism adapting and responding to the changing internal and external environments.

Some of the adaptive responses such as the proliferation of allowances and the degeneration of the grading and promotion schemes will have adverse effects on the internal administration and personnel policies of the employing authority. It may become increasingly difficult to apply reasonable standards in the selection of individuals for progress to higher grades or more demanding work. Poor work or even irregular spasmodic attendance may be rewarded by promotion or the receipt of increments notwithstanding provisions regarding satisfactory performance. Good work, commitment and devotion to duty may be unrewarded as standards become devalued thereby discouraging application and effort even further. Such a regressive spiral of administrative control coupled with administrative connivance at the bending or breaking of rules and good practices can be extremely difficult to halt and reverse. Falling real living standards may encourage if not compel public service employees to seek supplementary forms of income. These may be associated with their public service employment giving rise to various forms of corruption or may come from second or multiple jobs.

It should be expected that there will be adaptive developments in response to imposed pressures on pay and these developments may have long-lasting undesirable effects.

Both experience and policy responses have varied from country to country and perhaps from time to time within a country. There is therefore no single or unique public service pay problem or appropriate policy response. However, policy-makers in developing countries can benefit from a comparison of how the diverse problems of pay administration have been dealt with in a variety of other developing countries. Many countries have applied strict control on increases in public service pay scales yet the outcomes have differed and there may well be lessons and experiences which can, after suitable modification to fit local circumstances, be transported across national boundaries.

Study Design

Definition of the Public Service

While it would be generally agreed that the public service is narrower in coverage than the public sector (parastatals and other forms of commercial or industrial enterprises being excluded) there is no general agreement as to what precisely is meant by the term. The elaboration of an appropriate definition for the study might follow one of two approaches. First, use might be made of an existing national administrative practice as the basis for distinguishing public or civil servants from other public sector employees. Alternatively, use might be made of a more functional concept of the civil service, the functions included being consistent with the objectives of the study at hand. Both approaches give rise to problems.

As regards the use of administrative practice, it is to be noted that the IMF in its recent study of government pay and employment[1], adopted the classification used in the Fund's Government Finance Statistics Yearbook as the basis for determining the units of government activity to be regarded as the public service. This classification reflects the national budgetary practices in reporting government revenues and expenditures. Although following this approach is convenient for compiling international statistics on government activity and may be appropriate for a study of government employment and pay at a general level, it gives rise to inconsistences between countries depending on the extent to which particular services are provided by government and the organisational structures in individual countries. Thus, teachers and health service employees may sometimes be included in government expenditure and be treated as civil servants and elsewhere may not. Similardifficulties arise if one attempts to use national practice with respect to the various methods used to determine terms and conditions of employment of different categories of public employees.

In theory at least one should be able to obtain more cross-country consistency through the use of a functional definition of what constitutes the public service. However, such definitions can be formulated only in somewhat general terms leaving considerable scope for interpretation. Another difficulty is that, whatever the functional definition used, there will be many countries that will not be able to provide data on a basis fully consistent with it.

Despite these weaknesses, it is believed that, given the purposes of the present study, a functional definition is to be preferred. Either approach will involve some inconsistencies and the need for adaptations of raw data provided by government. However, these are likely to prove more manageable if a rather narrow functional definition of the public service is taken as a common point of departure.

Accordingly, the study will be confined to employees engaged in the central administration of the state, conforming to the usual view of "civil servants". This would include the administrative employees of various central

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1/ Peter S; Heller and Alan A Tait, Government Employment and Pay; Some International Comparisons. IMF Occasional Paper 24, Washington D.C., 1983, Revised 1984.

government ministries or departments, as well as those of any autonomous or semi-autonomous public agencies that are administrative or technical rather than commercial in orientation and whose employees are commonly regarded as part of the civil service for the purpose of determining terms and conditions of employment e.g. the Social Security or National Provident Fund Authority. On the other hand, public commercial enterprises and public utilities would be excluded, as would be employees of regional, provincial and local levels of government, postal and telecommunications, teachers and hospital workers, as well as the various uniformed services and the judiciary.

The above definition is not without its ambiguities, particularly as regards organisations that are agencies of government but that may also have a degree of autonomy both in their management and in the determination of the terms and conditions of their employment. Rather than seek to elaborate some complex functional distinctions that would cover there bodies, it would appear more practical to leave some lee-way to allow individual countries to provide their own working definition of the public service in their response to the questionnaire.

The above definition may appear somewhat narrow as compared with national concepts of the public service. Thus large groups of what may be regarded "government" employees are being excluded e.g. teachers and hospital workers. The over-riding reason for seeking to confine coverage to central government employees narrowly defined (the civil service) is that extension to other groups would involve very considerable increases in the amount of data to be collected and examined. While it would be highly desirable to obtain a comprehensive survey of pay practices and developments in the whole public sector, it is simply not feasible to attempt this with existing resources. Preference has been given therefore to an attempt to obtain adequate data and analysis for a more limited coverage.

The most important group which has, regretfully, been omitted from coverage is regional, provincial and local government employees. A number of countries are implementing policies of decentralization which transfer central government functions and employees to other levels of government with the result that their employment levels and pay-bills may be considerably larger than those for central government. However the very process of decentralization may add to the difficulties of data collection. Relevant information may be scattered among a number of authorities. To the extent that local government authorities adopt different pay scales, the task of data analysis, if the data are provided, becomes very much greater.

One group of central government will be excluded for practical reasons. In many countries the foreign service has a number of special allowances, possibly pay scales, and special rules regarding the grading of individuals which are different from those of the rest of the public service. It would add considerably to the complexities of the analysis and impose heavy burdens on those completing the questionnaires if this relatively small number of employees were included. Little of relevance to the public service generally will be lost by excluding foreign service employees and the survey will therefore be confined to home or domestic public service employees.

The main concern will be with the established or permanent members of the public service which usually form the large core of this sector of public employment. However in some countries casual or temporary or part-time employment may be significant and the survey will include separate questions on the extent of this type of employment.

Issues to be examined

The main themes to be explored in the project are the current systems of pay determination in the public service, the current levels of pay, allowances and fringe benefits, developments in these since 1975, and comparisons of pay and benefits of public service employees with those provided by other employers for comparable types of jobs. Recruitment and promotion practices will be examined to seek to establish whether these have been adapted to meet changing circumstances. Movements in the aggregate cost of pay and various allowances and benefits will provide some information on the extent to which restrictive public service pay policies have been offset by some degree of compensatory improvements in other conditions of employment and will provide some indication of the consequences for governments' economic management policies, or expenditure requirements, of adaptive employment management responses.

It will be necessary to collect most of the information from governments. There is relatively little currently available on a comprehensive basis. Reports of Commissions of Inquiry into the civil service, or similar sources, will provide some data for some countries, but this will often need to be up-dated and it is necessary to discover the extent to which the Commissions' recommendations were implemented. It may not be possible to collect all, or a majority of the data, for some countries included in the survey, and it will prove difficult to collect all the required information in any of the countries. However unless an attempt is made to overcome the difficulties inherent in any examination of these issues in developing countries little progress can be made towards the provision of a pool of comparative information.

Because of the problems of data availability it is proposed that two questionnaires be provided. The first, longer detailed questionnaire at Appendix A will provide more information. The second, at Appendix B, is a shorter questionnaire designed to obtain the minimum amount of information consistent with a comparative analysis of developments and practices in a number of countries. The selection of countries for the Detailed Questionnaire Appendix A will be determined by the anticipated availability of data and the resources available to collect them. A preliminary list is attached as Appendix E. In some instances the existence of a standing Civil Service Commission or similar body might indicate that detailed information is likely to be available. In others a recent Commission of Inquiry might have produced much of the data.

The following discussion of issues will refer primarily to the detailed questionnaire with an indication of how the information obtained from the shorter questionnaire at Appendix B will be used in the analysis.

The pay of public service employees

Public service employment is characterised by the existence of categories and grades to which are attached salary scales. The allocation of an individual to a grade, or promotion to another grade or category, are important determinants of his basic pay. Once allocated to a grade an individual's basic pay is frequently determined by the salary scale structure; usually there is a series of increments received annually or biennially, on completion of the appropriate time-period of employment, subject in some cases to satisfactory performance. In addition an employee may receive various cash allowances and non-cash fringe benefits or payment in kind. Regrading or promotion may lead to an increase in any or all of these elements of reward.

Public service employees may therefore receive improvements in their pay or standard of living from six sources.

(i) a general increase or improvement in their salary scale applicable to all members of the grade on that scale;

(ii) regrading or restructuring of existing grades or salary structures;

(iii) an increment on an existing unaltered salary scale;

(iv) the receipt or improvement of a cash allowance;

(v) the receipt or improvement of a non-cash fringe benefit or payment in kind.

(vi) promotion

Analysis only of the level or changes in the basic salary scales through time will provide inadequate and misleading information on the trends of actual money and real incomes of public service employees and may be an unsatisfactory basis on which to compare the relative terms and conditions of public service and other groups of employees. It is necessary to try and obtain information about all six possible sources of improvement in the total package of rewards.

The grading system for pay purposes

Because of the importance of the grading and occupational classification system for salary purposes in determining the allocation of individuals and groups of individuals with similar skills such as university science graduates or high school leavers with specified qualifications, and so on, it is necessary to collect information about the grading system and its relationship to the salary scale structure.

Often posts are classed into various grades and a number of grades into a category, e.g. the General Clerical and Executive category may have five or six grades, the Administrative category may have four or five grades and the Scientific, Technical or Professional category may have six or seven. Each category may have its own distinct grade structure and salary scale or there may be correspondence or over-lapping of grades between different categories, or each category may have its own distinct set of grades which are grouped together for pay purposes and assimilated into a common set of salary scales. Sometimes grades from different categories may share a common salary scale with grades from other categories but have more or fewer increments.

There may be a specified number of posts in each grade so that individuals compete for admission into the various grades on initial entry into public service employment or through promotion procedures once recruited. In some cases grade may be determined essentially by the individual's academic or other qualifications. The total number of posts may be fixed but the allocation among the different grades may be more flexible.

The question of the determinants of the grade and thus salary scale of a public service employee is answered in a variety of ways. However there is one distinguishing feature of the various practices which has far-reaching implications for the structure of the public service grades, the pay progression and expectations of individuals and so the total cost of the public service pay-bill and morale and efficiency. All grading systems have to make a basic choice whether the grade into which an individual is allocated is determined by the post or job he holds, or whether it is determined by his personal characteristics. Put simply there is a choice between grading the post or the person. In practice, however, most systems incorporate elements of both. Rigorous adherence to one principle is rare, although systems are based predominantly on one or other of these choices.

Systems based essentially on the grading of posts require an establishment strength specified in terms of the number of posts in each grade and category. This may be determined by job specification, job evaluation and work measurement techniques which lead to the calculation of the number of posts in various grades needed to perform an expected or specified amount of work. Access of individuals to particular grades is then determined by the availability of vacancies at specified grade levels. Expansion or contraction of the number of posts lead to changes in the number of vacancies which will frequently have direct effects on promotion possibilities and expectations. Often, if there is a reduction in the number of posts in a particular grade, those individuals in the surplus or abolished posts are allowed to retain their grade and salary even though they may be transferred to lower-grade work, incorporating some element of grading the person rather than the post. This is a recognition that the individual has not been downgraded because of personal deficiencies and can be regarded as an element of grading the person within a system which is primarily based on the grading of posts.

Similarly, some post grading systems incorporate small elements of personal characteristic reward by granting an extra payment or one or two increments to individuals who possess specified qualifications, as well as possibly giving them preference for promotion.

The characteristics and formal qualifications of individuals such as education or professional qualifications, length of service, experience and performance, may be taken into account when selections are made to fill the predetermined vacancies, but suitably qualified individuals may be unable to obtain promotion to a higher grade because of a lack of vacancies. This can affect motivation and performance, either by discouraging people from obtaining the required qualifications or experience, or by leading to a sense of frustration with deleterious effects on work. Alternatively it can lead to improved performance as individuals compete more intensely for a limited number of promotion opportunities. If there are bottlenecks in promotion opportunities, general salary revisions and the size and frequency of incremental payments may be more important in maintaining morale. Experience often suggests that where there is a high proportion of a grade on the maximum of a salary scale with limited promotion opportunities morale and performance suffer.

The alternative system essentially grades individuals on the basis of their formal characteristics such as educational or other qualifications and/or length of service. This means that while government may determine the structure of the grades of public service employees, and in some cases the numbers at each level, to some extent the employees themselves influence or determine their grades by obtaining the appropriate qualifications. Much may depend on the extent to which government limits the number of posts in each grade and the extent to which promotion to a higher grade automatically follows the attainment of some predetermined and specified level of formal qualifications. In some situations government may lose some control over the grade composition of its workforce and over the total cost of public service employment. This may be more serious if government has guaranteed employment to all those possessing certain qualifications such as university or high school graduates.

This approach may have advantages in that it encourages staff to obtain those qualifications which lead to regrading and higher salaries. It may also encourage greater flexibility in the allocation of employees to different work as their salary and grade is not adversely affected by transfer to what might otherwise be a lower-paid job. It may reduce burdens of grade and pay determination administration particularly where jobs are not easily defined except in terms of the characteristics of the people performing them.

While the approach may encourage individuals to obtain higher qualifications and reward long service by both increments and grade promotion, it may be associated with a situation in which an individual may be promoted to a higher grade with no change in duties. The government is in effect paying a higher wage for the same job although it may be performed better by the higher qualified person. It can also lead to over-qualification of staff in regard to their duties and in regard to the requirements of the public service, although the latter point may be ameliorated if individuals' duties, and so the duties of the whole department or ministry, are revised to take account of their changed qualification.

All systems of grading and pay will have repercussions on the performance and motivation of individuals. A personal characteristic reward system will encourage the pursuit of formal qualifications if promotion to higher grades is based on these criteria. A job grading system will encourage the efficient performance of duty if this is seen as the main criterion for promotion and there are promotion opportunities. The incentive effect of either system will be influenced by what is happening to other elements of pay. If there are very long incremental scales with sizeable increments, promotion may be less important. Improvements in income can be obtained from other sources.

Question (1) asks for information about the different categories and grades. Questions (2)-(7) seek to discover how people are classified and what controls exist to prevent or control grade creep. Question (8) asks for the numbers in each grade since 1975 so that compositional changes in the public service employment can be examined and the effectiveness of control over the grading system seen. The shorter Questionnaire will ask for this information only for 1985. Question (9) asks for details of revisions in gradings since 1975 to provide additional explanatory comments on the data from Question (7), and will be excluded from the shorter Questionnaire.

The basic characteristics of the grading systems, the degree of formality or informality and the ways in which they have responded to various recruitment and wage restraint pressures will emerge from analysis of answers to these questions.

The size of the public service

The size and composition of the public service are important determinants of the cost of public service employment. Changes in the structure of employment, indicated by the numbers in the various categories and on different salary scales may indicate genuine occupational restructuring, e.g. a relative increase in professional, scientific and technical categories, or be an employment management response to wage constraints, e.g. a relative increase in higher grades within the same occupational category.

The annual data in Question (8) will show the trend of public service employment. Information on total employment since 1975 will be available for some countries for some periods in the ILO Yearbook of Labour Statistics, so that some indications of the trend in relative importance may be obtained.

Differences in government organisation and variations in the extent of centralisation and decentralisation as well as in the bases on which data are collected in different countries will make it difficult to obtain a uniform measure of the relative importance of government employment in the various countries. However some indication of the size of public service employment and its change through time needs to be obtained and this is as useful a measure as any other.

It is recognised that complete data for the full time period may not be forthcoming in any country. The General Report to the Joint Committee on the Public Services, Third Session 1983 (ILO Report I) contained employment data for only 21 countries. Only seven of these were LDCs and in only three of these cases was the information obtained from the return of the ILO questionnaire.[1] It is the paucity of currently available information on employment in the public service and its development through time that makes it important to try and collect such data as are obtainable not withstanding the immense difficulties that are anticipated both in the assembly of the data and in rendering them into some standard form.

Basic salary scales

Basic salary scales provide the first source from which public service emoluments flow. Questions (10)-(12) will provide the connection between grading and salary scales.

Questions (13)-(15) will provide details of the incremental system so that estimates of the combined effects of general salary improvements plus increments can be made. This will provide a better indication of the development of effective pay and real pay of individuals in specific grades than examination only of movements in salary scales. It will be possible to produce 'non-promoted' career pay profiles for public service employees in different grades, i.e. the change through time of the basic salary of an employee recruited at some time since 1975 who has remained in the same grade.

Question (13) could provide data from which calculations can be made of the annual cost of increments to the public service pay-bill. The higher the proportion on scale maxima the lower the cost of incremental scales. However the higher this proportion the greater the expected pressure on promotion or re-grading.

Allowances and overtime

The extent of additions to pay from sources other than basic salary and increments will be obtained from Questions (16)-(20). Merit pay, or similar provisions, may be a feature of public service employment, and there may be some pressure for an extension of this and an associated diminution of automatic increments. Merit pay schemes are frequently difficult to

1/ ILO, General Report, Report 1, Joint Committee on the Public Service, Third Session, Geneva, 1983, Table 1.

administer but this aspect will not be pursued because of inherent difficulties of collecting evidence in an objective consistent way. However, Question (16) seeks details of the extent and nature of such schemes. Information on other allowances will be collected together with details of the numbers receiving them and their amount. This will supplement the information on salary scales and increments and provide a more realistic picture of the current levels of cash rewards received by public service employees. In some cases basic salary might account for only a minority of the total cash emoluments.

Changes in allowances since 1975 (Question 18) will enable a comparison to be made of any shifts in the relative importance of basic salary and allowances. This might indicate a response to wage restraint or reflect a shift in general policy regarding the desirability or otherwise of a multiplicity of supplements to basic salary.

Overtime (Questions (19) and (20)) may provide additional pay for some grades and may become an established feature of pay supplementation.

Changes to Salary Scales

Differences in arrangements for the periodic adjustment of salary scales and allowances will be obtained from Questions (21) and (22). Practices and procedures vary among countries. In a number of cases general salary scales may be unadjusted for a number of years and then subject to what may appear to be a large increase in money terms. Real wages may still be considerably lower than in the past. In other cases there may be regular cost-of-living allowances or other forms of quasi-automatic adjustments, perhaps applicable to employees in all sectors.

If there are no provisions for periodic adjustment of general salary scales there is much more likely to be pressure on re-grading or promotion. A comparison of the different approaches, including the lack of a systematic consistent policy approach, will present a range of options, and may allow some general conclusions to be drawn regarding the likely consequences, advantages and disadvantages, of different types of government policies towards the adjustment of public service pay.

The processes by which salary scales and allowances are revised may influence both the frequency and content of revisions. An automatic linkage of changes in basic salaries to a retail price index will predetermine the size of some increases, and the administrative arrangements will determine the regularity of the adjustments. Collective bargaining or unilateral determination by government may lead to fairly regular increases but these may lag behind price changes or movements in wages elsewhere, or may result in relatively few pay adjustments.

Fringe benefits

Fringe benefits - deferred or contingent payments and non-cash benefits or payment in kind - are often regarded as important elements in the attraction of public service employment. Pension provisions, and often free housing, may be singled out as especially important. Questions (23)-(26) seek to elicit details of these provisions, the numbers receiving them and the value or cost to the government of the benefits. Changes since 1975 will also be sought in the Detailed Questionnaire. There may be relatively little information available about the cost of some benefits such as free housing. The cost of the provision, or its imputed cash benefit to recipients, may not be known to government. In these cases, it may be possible to get some indication of the value by examination of the details of expenditure of similar income groups from Household Expenditure Surveys or similar sources.

The definition of 'salary' adopted for calculation of pension entitlement can have a significant effect on the size of public service pensions. If only basic salary is taken into account and allowances make up a sizeable proportion of the total remuneration, the pensions actually received may be a much smaller proportion of employment income than might appear at first sight.

Promotion

Promotion is defined as movement to a different grade or category which has a higher salary scale than the grade formerly occupied.

Promotion, whether genuine or a phoney induced response to wage restraint, can have the same effect as an improvement in basic salary, as well as form part of the career expectations of public service employees. Internal labour market requirements frequently necessitate a considerable amount of internal promotion. Questions (27) and (28) seek to discover the criteria for promotion and the extent to which it is based on merit, seniority or some other consideration. Question (29) is intended to ascertain whether promotion to a higher grade always involves a change in duties. In some cases, it may be that promotion is in effect an extension of an incremental scale, or the result of grading by personal characteristics. Question (30) asks about the incidence of promotion. This can indicate the extent to which an individual might have reasonable expectations of higher pay and may be a contributory factor to morale and performance. The possibility of movement from one category to another is often advanced as an important factor in the retention of more able members of the non-Administrative categories. If there is little opportunity to progress to the very highest posts, often located in the Administrative category, some members of other categories may leave.

If there is a staff establishment specifying a certain number of posts in each grade, there may be bottlenecks or a dearth of promotion opportunities for able and qualified candidates, Question (33). This is the opposite side of the coin to phoney promotions where higher-graded posts are deliberately created.

Recruitment

The recruitment grades in the public service internal labour market provide important points of contact with the external labour market. In many countries, specified minimum educational or other formal qualifications are required for recruitment into a grade whether the grading system is based on posts or people. Questions (34) and (35) seek information on the external entry grades and the criteria for recruitment.

The ability of the public service to attract suitable recruits varies from country to country. Questions (37)-(40) ask for information which will give some indication of the supply of suitable applicants and show whether there are particular difficulties in attracting certain occupations or skills.

In some cases, posts in grades which are not usually regarded as external-entry grades may have been filled from outside the public service rather than by promotion because of a lack of suitable internal candidates, for example, some very senior administrative posts, or some requiring professional qualifications and experience. Questions (36) and (40) seek to obtain information on this. In some cases, this kind of external recruitment may occur as part of a deliberate policy of encouraging movement around the various parts of the wider public sector or indicate a shift away from the traditional view of the political neutrality of public service employees to a view that some senior and perhaps politically sensitive posts should be filled by people with political commitment or attachment to the government of the day.

Governments may guarantee employment to graduates or others receiving state-funded education, or may impose a minimum period of public employment as a condition for receiving educational support. This may be to ensure an adequate supply of trained labour, or may be designed to prevent unemployment among educated vocal groups. Labour supply conditions may have changed so that there is no longer a shortage of educated entrants and the employment guarantee may now have the effect of unduly expanding the number of public service employees. This can have adverse consequences on work-effort, job grading and work measurement, and the perceived lack of freedom of choice of employment, or place and type of employment, may lead to poor morale. Question (37) will provide some evidence of the extent of employment guarantees.

Retirements and resignations

Quits - retirements and resignations - may indicate a lack of relative competitiveness in public service terms and conditions. The number of retirements provide some indication of the promotion possibilities, and the extent to which natural wastage provides some margin of opportunity for the restructuring of public service employment without the necessity for retrenchments and dismissals. Question (41) seeks to obtain detailed information of the number of quits, retirements and dismissals since 1975. (In the shorter Questionnaire for 1985 only.) Question (42) asks how many people over the normal retirement age were employed in 1985. This can be an indication of the inability to attract suitable new recruits, and comparison of these answers to those on recruitment should indicate whether labour shortages are the main reason for the continued employment of those over pensionable age or whether this might be a way of providing higher incomes to some, perhaps because pensions are relatively low.

Pay comparisons

It is important that an attempt be made to compare pay levels in the public service with pay for similar jobs in other sectors. Such comparisons are fraught with difficulties. They should be based on a detailed examination of the job requirements, including where appropriate, the required educational or other qualifications of successful candidates for posts in the public service and the outside employments. The grades and salary scales for similar or like jobs should then be compared as should the actual pay levels, allowances and fringe benefits. For many white-collar or professional employees the career prospects and expectations and pension provisions could also be relevant. Such an examination is a mammoth undertaking within a single country. To attempt it for a number of countries would require resources far beyond those available for this project.

It should be possible, in some countries, to obtain some information which, while not satisfying the full rigorous requirements of a complete comparability exercise, will shed some light on the relative pay of public service employees. Certain benchmark jobs have been selected in Question

(44). These comprise occupations included in the ILO October Occupational Earnings Survey since 1983, plus a few additional ones to cover other types of occupation or entry levels. Average earnings and salary scales for these occupations and their equivalent in other parts of the public sector, and in the private sector, are requested. From these data, and assuming that the occupational categories are roughly the same, it will be possible to form some view of the relative competitiveness of the pecuniary elements, excluding fringe benefits, in the package of rewards of various employments. It is not feasible to try and collect information on allowances and fringe benefits in other employments. These deficiencies in the comparisons have to be accepted, as does the absence of any information on job content, effort-input requirements, and non-pecuniary advantages. In many cases, it may not prove possible to collect much information, but salary scales for other parts of the public sector ought to be available.

As an additional very broad indicator of the comparative level of pay and changes in the level through time, it should be possible to obtain data from existing ILO sources on GDP per capita and average earnings for the whole workforce or a part of it, although many countries do not provide regular information for the ILO series. However, such broad comparisons of aggregates are not very helpful. There are too many unknown and unquantifiable variables included in GDP per capita, e.g. demographic composition, labour force participation and conventions adopted in the compilation of GDP figures in respect of self-employment or provision of non-marketed goods and services for personal consumption, for meaningful comparisons to be drawn.

<u>Total labour costs</u>

The total cost of public service employment is often regarded as an important economic variable. As an element in the public sector borrowing requirement it may be one of the factors taken into account in a policy which places importance on the level of public borrowing. It is however extremely difficult to provide any indication as to what the appropriate level of public sector employment costs in relation to GDP or Total Government Expenditure ought to be. This will depend on the definition of public service, the organisation of government activity and, more crucially, a political decision as to what is and is not properly part of a government's function. Any attempt to draw a line separating activities which 'ought' to be undertaken by government and those which 'ought' to be undertaken by the private sector can be no more than a value judgement reflecting political positions. However, in the absence of any organisational change in government activity reflecting a decision to extend or reduce government intervention as a matter of policy, any changes in the cost of public service employment through time in relation to total Government expenditures, GDP or some other economic variable, may indicate relative looseness or tightness in government's employment policies regarding wages, the numbers employed, or both. It may still be the case that an increased expenditure represents an attempt to improve the quality or quantity of the public services provided to the population, or may be seen as a productive act of investment in future economic growth.

Questions (45) to (47) seek to obtain information on total public service pay-bill, the cost of fringe benefits and Government current expenditure since 1975. (For 1985 in the shorter Questionnaire.)

<u>Delays in payment</u>

It is thought that in some cases, there may have been delays in the payment of public service employees, perhaps because of government budgetary difficulties. Such delays may adversely affect morale and performance and create great financial problems for public service employees who might then turn to other sources of income. Question (48) seeks details of any delays.

Casual, daily or non-permanent employees

Although the public service in most countries is based on a permanent or "established" workforce, there are a number of countries which also employ casual, daily, non-established or temporary employees. This may provide a degree of flexibility in manpower resources permitting the public service to temporarily expand employment in order to deal with short-term increases in demand for labour without incurring long-term costs and obligations. Often such temporary employees receive less favourable terms and conditions than established or permanent employees performing similar duties. Rather than the additional disadvantage of temporary employment leading to a higher wage in order to equalise net advantages, it results in lower pay, and fewer or worse fringe benefits. This reduction in employers' labour costs may induce them to expand temporary employment at the expense of permanent posts so that casual or temporary labour may be a regular feature. In other cases temporary employment may be used by government as a form of unemployment-insurance substitute so that jobs may be created deliberately to reduce the level of unemployment and provide some income for the unemployed.

Part-time employment may fulfil similar functions, be a response to labour market shortages, or be a form of work-sharing designed to alleviate excess supply of labour. It may also be intended to provide employment opportunities for married women with family commitments. In some cases part-timers may receive the same terms and conditions as full-time employees, on a pro rata basis, but in other cases they may have less favourable terms and conditions so that their cost to the employer is proportionately less than their full-time counterparts.

While it would be desirable and important to undertake a full-scale detailed study of the extent of casual and part-time working, and the reasons for changes in their incidence, it is not possible to do this in the context of the present study. However some information will be sought on this issue. Questions (49) and (50) will obtain details of the number of casual employees in 1985 by grade, and the pay level for these grades. Question (51) seeks to establish whether there is similarity of job content or grading with established grades to allow comparison of any differences in pay for people doing the same kind of work. Questions (52) and (53), omitted from the shorter questionnaire, ask for details of numbers employed and the pay levels from 1975. This will allow any changes in the relative importance of casual employment over the past ten years to be analysed.

Question (54) seeks to ascertain the extent to which allowances and fringe benefits are the same for established and casual employees. It will allow broad conclusions to be drawn which should be sufficient to indicate the range of magnitude of possible savings in employment costs by the use of casual rather than established employees. Question (55) asks whether casual employees accumulate pension entitlements.

Questions (56)-(59) asks for similar information for part-timers.

Other comments

There may be issues of particular concern to individual countries which cannot adequately be covered in a general purpose questionnaire. Question (60) invites respondents to raise any additional issues or make any further comments if they choose.

Cohort Studies

Analysis of the responses to Questions (10)-(12), (14)-(20) and (23)-(26) will provide information on the changes in salary, allowances and fringe benefits through time. Examination of the changes in salary scales will indicate how the general real living standards of individuals on specified positions on certain salary scales have changed in both money and real terms. The inclusion of the effects of incremental sales will allow similar calculations for career profiles of 'assumed' or 'typical' individuals, and will provide a better indication of how the real living standards of those which have been in the public service for certain periods of time have altered.

Comparison of changes in Salary Scales with changes in the number of increments etc may also indicate the extent to which basic pay revisions have been used in effect to create different salary scales for new entrants and existing employees. For example the granting of an additional increment instead of a general increase in all salary scales is equivalent to adding a new, and in real terms lower, incremental step which might be paid to new recruits. Similarly adding extra increments to a salary scale may provide pay increases to those on the scale maximum, who might be a majority of employees, without raising the starting salary of new recruits.

However, the profiles built up from the data, useful though they will be, and although better than an analysis of basic scales alone, will only provide a better indication of what has actually happened to the total rewards of 'typical' or 'assumed' individuals. This can be supplemented in some cases by cohort studies of actual public service employees. These can be done in two main ways.

(i) An Entry Cohort

A sample of public service entrants in, say, 1975 can be selected and their subsequent careers analysed showing their salary and Grade each year. This can be compared with movements in the actual basic salary scales. If possible the various allowances and benefits can also be analysed. This will also provide information about promotion and wastage or turnover. Preferably the cohort should cover more than one Department or Ministry and more than one Grade.

(ii) A Current Grade Cohort

A sample of individuals currently in a given Grade can be selected and their careers traced back to show the same information as in (i). It might be administratively easier to trace the records of this cohort than (i) but this approach provides less information on promotion probabilities and none on turnover.

Both methods will be difficult. The successful implementation of the analysis requires good personnel records and wage data on individuals. These may not be available. However if reliable data on the Grades of individuals at different times are available it may be possible to construct their salary movement from previous salary scales and rules of salary adjustment on promotion.

It is doubtful that the necessary detailed information will be provided by a government department. If cohort studies are undertaken it will be necessary to appoint an external collaborator, perhaps the person responsible for completing the Detailed Questionnaire if this is done by an external collaborator. The outline approach would be to select two or three entry grades and a starting period of 1970 and 1975. The number of individuals to be studied would depend on the size of the entries in the base year but it is anticipated that some 50 or so be selected for each grade. These should be spread across three or four ministries or departments. The information to be collected for each individual is given in Appendix C. This will allow the career profiles of a number of individuals to be created. If full returns are obtained it will also provide the data on which promotion probabilities can be calculated and the actual development of real income through time to be measured more accurately. Wastage rates can also be assessed.

If it is not possible to obtain data for entry cohorts the data form at Appendix D can be used to gather information on current grade cohorts. In this case about 50 current members of three of four grades would be selected from three or four ministries.

Coverage of the Survey

While it would be desirable to include developing economies in all parts of the world in the survey this is precluded by resource limitations and the time available. In these circumstances it is preferable to confine the study to an area which includes countries which have some features in common, and also some differences in their specific problems and previous policy approaches. It is therefore proposed to limit the study to Africa and to include all African countries in the survey. A suggested list of countries for inclusion in the Detailed Questionnaire survey in provided in Appendix E. All other African countries will be asked to complete the shorter questionnaire.

Some of the countries in Appendix E have been selected because they have had Commissions of Inquiry or other examiniations which may have provided useful background information. Others are included because relatively little is known about recent developments in public service employment and it is thought that their experiences might make a useful contribution to a comparative study.

TIME TABLE

May 1986	Preparation draft questionnaire and discussion with interested organisations.
June 1986	Issue simplified questionnaire (B). (Indicate replies desired within three months) Initiate Detailed Studies
September 1986	Reminder for late replies.
December 1986	Results of detailed studies analysed.
January 1987	All data to be received
January-September 1987	Production of Report

Possible outline of Final Report

1. Introduction

Objectives
Definition of Public Service
Sources and methods of obtaining information

2. Size of the Public Service

Number employed and changes through time as percentage of total employed population on various definitions.
Size of Public Service pay bill in relation to Government expenditure and GDP through time. (Pay bill may refer only to basic salaries, or include allowances or the full package of benefits including pensions) Where possible we adopt the concept of 'total remuneration' but in some cases this may have to be modified in the light of data availability.

3. Grading and Job Classification Systems

The procedures and systems for determining job grades, including the use of job evaluation, or other methods.

Groups and Categories - vertical structures
Occupational categories

4. The Determination of Pay

The process of determining pay scales for Grades and of adjusting them or determining COLA. Use of special ad hoc Committees or a permanent Civil Service or Public Sector Pay Commission.

Which Ministry is responsible for the determination of PS pay? The extent to which there is collective bargaining, grades covered and the bargaining agenda.

The principles followed in the determination of pay.

5. Salary scales

Relationship to Grades
Length of scales
Overlapping scales

6. Incremental systems

Number of increments in scales and size
Basis for receiving increment - seniority, merit
Frequency of increments and relationship to general pay adjustments

7. Developments of salary scales through time

Movement in scale minima, maxima, mid-points since 1975
Movements in Real Pay

8. Combination of Scale Changes and Increments

Money terms
Real terms

9. Allowances

Types of allowances, numbers affected, value and total cost
Changes in allowances through time
Special section on COLA

10. Non-cash benefits

Types of benefits, numbers receiving them, value and cost.
It may not be possible to cost benefits precisely but it ought to be possible to provide some indication of their magnitude and significance.

Benefits will be defined in this chapter as all non-cash elements in total reward excluding pensions which will be dealt with in the next chapter.

11. Pensions

Types of pension schemes, contributory or non-contributory, basis of entitlement, lump sum payments.

Arrangements for periodic revision of pension to retired public service employees

12. Combined effect of Basic Pay, allowances and Benefits

Estimates of changes in real package of rewards

13. Comparison of PS pay with other sectors

Urban workforce
Non-agricultural labour force
Agricultural incomes
GDP per capita
Benchmark jobs - external comparison of pay levels

14. Internal Pay Structures

Comparison of Grading and Salary scales for specified jobs within the Public Service in different countries
Comparison of internal pay structures in the Public Service with those in other sectors using 'benchmark' jobs data comparisons of internal relationships.

15. Employment of temporary and part-time employees

Extent of employment of temporaries
Grades in which employed
Pay, allowances and benefits compared to regular employees (same for part-time employees)

16. Promotion

Procedures and criteria
Numbers promoted
Effect on pay

17. Cohort Studies

18. Conclusions

APPENDIX The Comparison of Pay in the Public Service and Other Employment

Cover Note for Questionnaire

The ILO is carrying out a study of pay and related subjects in public service employment in Africa. In almost every country, public service pay and employment have been and remain important and difficult issues. The levels of pay, the numbers employed and the total pay-bill are matters of great concern and in many countries recent economic developments have led to considerable pressures being exerted on the public service.

A number of countries are considering revisions or the restructuring of the pay, grading and promotion systems in the public service, for pay cannot be divorced from grading and promotion and such matters as the number and size of incremental steps in salary scales are all connected.

The object of the study is the production of a compendium of information on pay determination in the public services in African countries which will provide those responsible for decision-making with an account and analysis of methods, systems and results of public service pay determination in a variety of developing countries. An analysis and comparison of experiences in a number of different countries will offer a framework within which decision-makers will be able more effectively to adapt their existing practices to the two main objectives of budgetary control and the need to recruit and retain a well-motivated efficient public service.

To produce such a compendium and related analytical studies, it is necessary for us to carry out a detailed survey of existing systems and practices. Accordingly, we would very much appreciate your cooperation in completing the attached questionnaire. While it is rather long and may require some time and effort to complete, we trust that you will appreciate the importance of the subject and will be able to devote the resources necessary for the careful answering of the questions posed. Only if we obtain extensive data from a large number of countries will the participating countries be able to benefit to the fullest from the data base of information being compiled. We also need a wide response to create a full appreciation of the difficult problems being encountered by the public service in many African countries.

For our purposes the public service is narrowly defined as employees of central government engaged in the administration of the state, conforming to the usual view of "civil servants". This would include the administrative employees of various central government ministries or departments, as well as those of any autonomous or semi-autonomous public agencies that are administrative or technical rather than commercial in orientation and whose employees are commonly regarded as part of the civil service for the purpose of determining terms and conditions of employment e.g. the Social Security or National Provident Fund Authority on the Central Statistical Office. This definition is not without its ambiguities, particularly as regards various public agencies which while organs of government may also have a degree of autonomy both in their decisions and in the determination of the terms and conditions of employment. Inevitably there may be some doubt on whether the workers of particular agencies ought to be included, and individual countries have some leeway in this regard to provide their own working definition of the public service in their response to the questionnaire. On the other hand, it is clear that workers in public commercial enterprises and public utilities are to be excluded if at all possible. For reasons of convenience it has been decided also to exclude employees of regional, provincial and local levels of government, workers in postal service and telecommunications, teachers and hospital workers, the judiciary and members of the foreign service as well as the various uniformed services (e.g. the army).

Thus the definition excludes a number of groups which may be regarded as public service employees in your country. For example, regional, provincial and local government employees, teachers and health workers, may all be counted as part of the public service sector in some countries. While it would be desirable to include all these groups in the study, the extra work involved in collecting the information and analysing it would be far too great. We are already concerned that the questionnaire may seem too long and would not wish to add to the burdens imposed on you.

In some cases, it may not be possible to provide the information for the public service as defined. Existing statistics may refer to a different definition and cover a larger group. If this is the case for you, would you please provide the information that you have available and tell us what the definition or coverage is. We will then be able to make the appropriate amendments to our analysis. If information is not available for 1985, please let us have the most recent data you have and indicate the period to which they refer.

We have tried to use standard terms which can be applicable to all countries in Africa. If you feel that the wording of the questions is not exactly right for your situation and that your answers refer to different definitions or terminology, please give us your answers with appropriate comments and indicate how the terminology or wording should be amended to fit your case.

Questions (1) - (44) refer to established, regular or permanent employees and casual, daily or temporary employees are covered in questions (46) - (50). Part-time employees are covered in questions (51) - (53). If it is not possible to separate the number of regular, casual and part-time employees in this way please give the total numbers employed in questions (8) and indicate the coverage in the answers.

We are anxious to obtain as much information as we can through this questionnaire so that the compendium will be helpful to potential users. We therefore would appreciate your every effort to supply replies that are as complete as can be. However, we recognize that in many instances it may not be possible to give full answers because all the necessary information is not available. In this case, please provide as much information as you are able to. It will still be useful.

Questionnaire

Job grading in the public service

(1) List the different grades in the public service and state how they are grouped together into classes or categories.

(2) Please describe the general approach used for grading of posts and/or employees and how the related decisions are taken.

(3) (a) Is there a specified number of posts in each grade or category?
(b) If yes, how is this determined?

(4) (a) Are individuals allocated to a grade or category according to their formal qualifications or length of service?
(b) If yes, is there any limit or control on the number of people who may be in any particular grade? If so give details and say how the limits are determined.

(5) How are posts classified?

(a) By some informal assessment process?
(b) Are posts classified essentially according to the qualifications of the incumbents?
(c) Is job evaluation or some other formal assessment technique used? If yes, give details.

(6) Is there a body or organisation or part of central government administration responsible for determining and revising job grading and classification? If yes, provide details and copies of any reports it has issued.

(7) Specify any methods to control upward revision in job grading.

(8) State the number of posts or the number of individuals in each grade on each salary scale for each year since 1975.

(9) Specify the major changes in the job grading or classification of major occupational groups since 1975 and the numbers affected.(e.g. 250 technical assistants regraded from Grade 9 to Grade 7 in 1981.) If details are contained in government or other reports it will be sufficient to attach copies of the reports.

Salary scales

(10) Provide copies of every salary scale operative in 1985 with its effective date of implementation. Indicate whether male and female salary scales are the same.

(11) Provide copies of all salary scales operative since 1975 and their date of implementation specifying the number and amount of each increment on each scale. If basic salary scales were unchanged but a cost-of-living adjustment or some other general increase was given please specify this and provide details of the general adjustment so that the nominal salary scales can be converted into 'effective' salary scales at each date.

(12) (a) State the jobs, occupations, grades or categories for which each of the salary scales apply in 1985.

(b) List all major changes in the classification of different posts, occupations or grades to individual salary scales since 1975.

(c) Are there some posts or individuals paid above or outside salary scales? If yes give the numbers and the range of their salaries, for each year since 1975.

(13) How many people in each grade were on each incremental step of each salary scale in 1985. If this is not known state the number of people on each salary scale or in each grade on the maximum of their salary scale.

(14) Under what conditions and how often are increments received?

(15) If there is a test of satisfactory performance or merit as a condition for receipt of an increment, or for passing an 'efficiency bar', specify the rules or conditions which have to be met and state the percentage of employees who fail to meet the requirements each year, if possible, showing each category or grade separately.

Allowances

(16) In addition to the usual increments is there any form of merit payment or increase in pay or accelerated increments for good performance? If Yes provide details of the amount and the conditions to be satisfied, and the numbers in each grade receiving such payment and eligible for consideration in 1985.

(17) List all other cash allowances or elements in pay in addition to basic salary, e.g. cost-of-living or dearness allowance, housing allowance, washing allowance etc. State the amount of each allowance and the numbers in each grade receiving each payment. (Note, reimbursement of expenses incurred in the course of official duties such as refund of travel expenses or per diem payments or daily allowances when working away from the usual place of work should be excluded. However any general allowances or payments not specifically related to the actual amount of expense incurred, e.g. a flat-rate or percentage motor or bicycle allowance, should be included.)

(18) Show all changes in allowances since 1975 and indicate when any new allowance was introduced or extended to additional grades.

Overtime

(19) Is overtime paid to public service employees? If so, to which grades, at what rate, after how many hours of normal work?

(20) State for each year since 1975 the average amount of overtime hours worked by each grade, the proportion or number of members of each grade receiving overtime payment and the average amount of overtime payment received by each grade.

Changes to Salary scales

(21) (a) Give details by categories or grades of how basic salary scales and allowances are revised, e.g. the role of an advisory or technical body submitting recommendations, collective bargaining, arbitration and/or unilateral government decision. What general principles or criteria, if any, are followed in fixing and adjusting levels of pay?

(b) Is there a permanent or standing body such as a Civil Service or Public Service Pay Commission or Board responsible for examining and making recommendations on public service pay? If Yes give details and attach copies of any reports.

(c) Has there been any Committee of Inquiry or similar body specially set up to examine and report on public service pay since 1975? If Yes attach copies of their reports and of any published government response.

(22) (a) Are there any standing arrangements for periodic revision of salary scales or allowances, e.g. commitment to annual or biennal reviews, cost-of-living allowance, dearness allowance, or similar element in pay? If Yes give details.

(b) If any of these revisions are automatically linked to movements in a Consumer or Retail Price Index specify which index and the precise nature of the linkage .

Fringe benefits

Note: Fringe benefits will be regarded as all deferred or contingent payments such as pensions or retirement gratuities, death or disability payments, and all non-cash benefits or payments in kind. Cash allowances included in Question 17 should not be included in replies to Questions in this section of the questionnaire.

(23) List each fringe benefit not listed in Question (17) and the number in each grade receiving each benefit in 1985. Include any special arrangements for access to consumer goods at government controlled prices.

(24) List all changes in these benefits since 1975.

(25) Do some individuals receive a cash payment in lieu of a benefit e.g. a housing allowance instead of free housing? If Yes state which benefit the in lieu allowance replaces, the numbers in each grade receiving it in 1985 and the average allowance paid.

If subsidised housing is available for public service employees indicate the numbers in each grade receiving it, and the average rent paid and cost of the subsidy. If this information is not available provide any information that is available to indicate the cost or value of subsidised housing.

(26) Specify the pension arrangements for public service employees?

(a) Do employees pay a contribution for their public service pension? If Yes give details of their contribution rates.

(b) At what age and/or after how many years of service can a public service employee receive a pension?

(c) How is the amount of pension calculated? If it is based on final salary are allowances included in the calculation of salary for pension entitlement? If Yes, give details of all payments included.

(d) Give details of any lump sum cash payments or other retirement payments made to public service employees and state whether these are in addition to the retirement pension or options to the pension, e.g. whether all or part of the pension can be foregone in return for a lump sum payment.

(e) Are there any procedures for adjusting the amount of pension received by retired public sector employees to take account of inflation or salary charges? If Yes, give details.

Promotion

(27) In deciding whether an individual should be promoted what is the role of:

(a) length of service?
(b) competitive examination?
(c) merit? (explain how this is assessed)
(d) formal qualifications? (Is the possession of formal qualifications a minimum condition for promotion from some grades to others or does it carry an automatic entitlement to promotion?)

Indicate where the importance of these factors varies for promotion from different grades.

(28) Is special attention given to ethnic or regional factors when considering people for promotion? If yes give details and the number of promotions in each grade made as a result of such considerations.

(29) Are vacancies in higher graded jobs a necessary condition for promotion, or are individuals ever promoted to a higher grade or salary scale with no changes in their duties or job? If so give details of the grades in which this occurs and the number or proportion of such promotions in each grade.

(30) What proportion of each grade is promoted each year?

(31) Can individuals be promoted from one class or category into another, e.g. Executive or General Clerical to Administrative, or Technical to Administrative? If yes, under what conditions?

(32) If there are over-lapping salary scales, does promotion to a higher grade always lead to an increase in salary? If Yes give details of the arrangements made to ensure that a higher salary is paid on promotion.

(33) Is there a waiting list of people eligible and suitable for promotion but unable to obtain promotion because of limited vacancies in higher graded posts? If Yes give numbers by grade.

Recruitment

(34) State the grades into which new entrants from outside the public service are recruited and give the minimum education levels or other qualifications for each of these grades.

(35) On what basis or by what selection procedures are applicants recruited? e.g. competitive examination, minimum qualifications plus interviews or references. Indicate where different procedures apply to different grades.

(36) Give the numbers recruited from outside into each grade for each year since 1975.

(37) (a) Does the government guarantee employment to a specified number of graduates of universities, colleges, high schools, or to those with other formal qualifications?

(b) If Yes, state the qualifications required and the grades into which these recruits enter.

(c) How many people were recruited into each grade as a result of this guarantee in 1985?

(d) Were other people recruited into these grades who did not come under the employment guarantee?

(e) Are graduates or others receiving state support for their education required to work in the public sector for a specified period? If Yes, give details.

(38) (a) How many unfilled vacancies were there for each grade in 1985? (Specify the date on which the vacancies existed.)

(b) What were the reasons for the unfilled vacancies?

(39) Do you have any evidence that the level or standard of applicants has been rising or falling in recent years? If so please provide details?

(40) (a) Are there special difficulties in recruiting suitably qualified members of certain grades or occupations?

(b) If Yes please give details.

(c) What action has been taken to try and overcome these difficulties?

Retirements and resignations

(41) Give the numbers leaving public service employment in each grade for each year since 1975 for the following reasons:

(a) retirement
(b) voluntary resignation
(c) dismissal
(d) transfer to other employment in the public sector
(e) other (specify if appropriate)

(42) State the number in each grade in employment in 1985 who were over the normal retiring age.

Earnings

(43) What were the average earnings by grade or salary scale of public service employees in 1985?

(44) The following occupations or jobs have been selected for comparison of the pay of public service employees with pay in other sectors. A brief job description indicating the level of the job is attached. Give the average earning and salary scale for (i) public service employees, (ii) other public sector or parastatal employees specifying which sector or parastatal the information refers to, (iii) private sector organisations specifying which main sectors or areas of activity the information refers to, if possible.

Give the date to which the information refers. If it is not possible to provide the information for 1985 please give it for the latest year available.

(a) Permanent secretary or head (non-minister) of a ministry or department. (Specify the comparable post in the parastatal or private sector).

(b) Clerk or clerical officer

(c) middle level executive official

(d) stenographer/typist, shorthand/typist

(e) computer programmer

(f) card and tape-punching machine operator

(g) junior administrative officer (the entry grade for university graduates to the administrative category)

(h) Messengers (if applicable state whether established/permanent or daily/casual)

(i) unskilled labourer (if applicable state whether established/permanent or daily/casual)

Employment costs

(45) Give the total public service pay-bill for each year since 1975

(a) total basic salaries

(b) total allowances

(c) total direct remuneration (a+b)

(d) Total cost of fringe benefits

(e) Total employment costs (c+d).

If this information is not available give the total pay-bill or total earnings for whatever public sector breakdown is available and specify the coverage and year.

(46) Give total Government current expenditure each year since 1975, using the coverage of public service adopted in reply to Question (45).

(47) (a) What is the total employment cost of the public service in 1985 including basic salaries, all allowances and all benefits in cash and in kind. Specify the items included in the total.

(b) What is the total cost to government of pension provision for public service employees in 1985? Indicate whether this is the total amount of employer pension contributions paid by government for both national and special public service schemes, or whether it is the total cost to government of directly making pension payments to public service employees who are currently retired.

Payment delays

(48) (a) Have there been any delays in payment of salaries or allowances to public service employees since 1975?

(b) If Yes, give details of the numbers and grades involved, the length of delay, the average amount of delayed payment, and the reasons for the delay.

Casual daily or non-permanent employees

Casual, daily, temporary or non-permanent employees are those who are not employed on a regular, established or permanent basis.

(49) How many casual or temporary employees were employed in each grade in 1985? State the date to which the information refers,e.g. 31 December or the average for a specified month or some other periods.

(50) What were the in rates of pay or scales for these grades?

(51) (a) Do any of these employees perform the same duties as permanent or regular employees?

(b) If Yes give details of which grades of both types of employees perform the same duties.

(c) Are there any different educational or other qualifications for acceptance as casual or temporary employees as compared with regular employees in the equivalent grades?

(d) If Yes give details of the minimum qualifications for each grade of casual or temporary employee, as compared with those of regular employees.

(52) Give the number of casual or temporary employees employed in each grade each year since 1975. State the date to which the information refers.

(53) State the rates of pay or scales for these grades since 1975.

(54) (a) Are there any differences in the entitlement of casual or temporary employees to receive any allowances or fringe benefits?

(b) If yes, specify the differences.

(c) If casual or temporary employees receive allowances and benefits, state the numbers in each grade receiving each allowance or benefit and the average amount paid. If the average amount paid or average amount of benefit is not available give the total cost.

(55) Do casual or temporary employees qualify for entitlement to a public service pension? If Yes give details of the qualifying conditions and amount of pension entitlement.

Part-time employees

(56) (a) Do you have provisions for the employment of part-time public service employees?

(b) If yes specify the definition of part-time, e.g. less than 20 hours a week, or less than half the normal working hours.

(c) Give the numbers employed in each grade and the date to which the information refers.

(d) If part-time employees are employed how is their rate of pay determined? e.g. do they receive the same hourly rate of pay as their full-time equivalents?

(e) What is the average number of hours worked by part-time employees in each grade?

(57) Give the number of part-time employees in each grade since 1975.

(58) (a) Do part-time employees receive allowances or fringe benefits?

(b) If Yes give details of the allowances and benefits received, the average cost of each, and the number in each grade receiving them in 1985.

(c) How is the entitlement or amount of allowances and benefits received by a part-time employee determined? e.g. proportionately to the number of hours worked in relation to the allowance received by a full-time employee in the same grade?

(59) (a) Do part-time employees have an entitlement to public service pension?

(b) If yes, give details of how their entitlement is calculated.

Other comments

(60) If you have any additional comments you wish to make or if there are any problems to which you wish to draw our attention on public service pay or employment please attach them on a separate sheet. Any additional information you think may be helpful should also be attached.

Descriptions of occupations

(a) Permanent secretary or head (non-minister) of a ministry or department.

Plans, organises, directs and controls, subject to a broad mandate from political head or governing body, the activities of a national state, provincial or local government department (or subdepartment), government administrative agency or intergovernmental organisation (or one of its departments); advises political head or governing body on important policy question; makes decisions within his broad discretionary power; performs other high-level functions in connection with government administration.

(b) Clerk or clerical officer
Office clerk (ISCO 3-93.10)

Performs a variety of clerical tasks, such as those which follow, depending on nature and size of office in which employed:
examines incoming mail referred to him for attention and assembles information needed for preparation of reply; composes letters in reply to correspondence or telephone inquiries, or to obtain information, and initiates other routine correspondence; calculates and checks factors for costing, estimating, valuing or other purposes; collates sales records and gives instructions for preparation of invoices and other documents in connection with sales and deliveries; receives and interviews clients, employees, sales personnel or other callers, and arranges appointments and directs inquiries to appropriate persons or departments; keeps and balances accounts of financial transactions and prepares statements of accounts; computes time, output or other factors and calculates earnings or payments due; receives payments of accounts and issues receipts; receives, counts and pays out cash; prepares loss or damage reports and insurance claims; prepares, issues, receives or checks forms and documents in connection with the administration or national, regional or local government legislation or other matters; determines material and production requirements; prepares operational scheduled orders or received orders for material and merchandise; files vouchers, receipts, letters and other documents; arranges for the transport of freight and prepares relevant documents; deals with complaints; compiles statistical information; records issues of stationery and equipment to staff and maintains records as required.

(c) Government executive official (ISCO 3-10.10)
Central government executive official
(middle level)

Acts as member of a section or division of a department, ministry or agency of central government dealing with particular administrative and policy matters concerning such government services as domestic affairs, foreign affairs, defence, education, environment, health, social welfare, labour, social security, industry, agriculture, justice, finance, transport, communications, staffing and organisation of government services and other government functions; performs a variety of administrative and executive tasks under the general supervision of a higher level administrator or official:

consults higher level administrators or officials to obtain directions and indications of policy to be followed; implements policy decisions and the provisions of laws, rules and regulations and, as necessary, devises and advises on procedures for their implementation; participates in the preparation of legislation and of rules and administrative regulations to implement such legislation in matters for which the department, ministry or agency is competent; provides secretarial support for official committees, working parties, etc.; arranges internal meetings, prepares and circulates papers for discussion, takes minutes and ensures that follow-up action is taken; administers government grants and subsidies to agriculture, housing, health, social welfare, social security, and special categories of the population; inspects working conditions, including safety and health arrangements, in factories and other workplaces and enforces safety and health regulations; advises and informs on matters relating to the labour market, employment placement, vocational training and guidance; undertakes research not requiring specialised scientific, professional or technical qualifications, using such sources of information as government statistics, documents and files, publications and findings from academic circles and independant institutions and persons; makes comparative analyses and writes reprots on specific policy questions; inspects, analyses and reports on the organisation of work and methods used in government services and makes proposals for changes.

(d) Stenographer/typist (ISCO 3-21.10)

Takes direct dictation of correspondence, reports and other papers by hand or machine, and transcribes dictated materials into typewritten form:

records in shorthand, by hand or shorthand-writing machine, dictated letters, memoranda, reports or other matter; types matter from shorthand notes, written drafts, recordings on dictating machine or other sources and cuts stencils; uses manual, electric or electronic typewriter, or word-processor; may perform limited clerical duties.

(e) Computer programmer (ISCO 0-84.20)

Prepares programmes to control automatic processing of data by computer:

studies programme intent, output requirements, nature and sources of raw input data, internal checks and other controls required, or, where available, uses specifications and instructions prepared by systems analyst; breaks down problems delineated by systems analyst into their simplest elements; prepares, from this breakdown, detailed logical flow charts and diagrams to establish the order in which data is to be processed, the points where decisions must be made between alternative courses of action, and the sequence of operations involved; converts flow charts and diagrams into computer programme (the list of instructions which control the operation of the computer) using programme language; using programme language; converts the programme, or directs its conversion, into code form to derive machine-processable instructions suited to type of computer in use; conducts trial run with sample data to test validity and logic of programme; amends programme as necessary; compiles written instructions for computer-operating staff; corresta programme errors by such methods as altering programme steps and sequence; analyses, reviews and rewrites programmes to increase operating efficiency or adapt to new requirements.

(f) Card- and tape-punching-machine operator (ISCO 3-22.20)

Operates alphabetic or numeric key-punch machine, photo-composing perforating machines, special data-preparation equipmment to prepare data-processing input materials, and other data type machines similar in operation to an electric typewriter to convert data to machine readable data or to a screen with the help of a punchcard device, a punched paper tape recorder, a key-to-disc coder, magnetic tape/coder/screen/terminal, or to verify the correctness of punching:

loads machine with decks of cards or reels of magnetic or paper tapes; sets machine for recording operation and moves switches to select appropriate functions; sorts documents or listed items into chronological or other specified order where appropriate; depresses keys to record data from source material in the form of perforations on card or tape or make magnetic impressions; observes machine to deterct faulty operation; maintains record of work completed; handles programme punching, which includes the correction of clerical errors.

(g) Junior administrative officer (the entry grade for university graduates to the administrative category)

Their tasks and duties include:

- making decisions on matters arising in the detailed implementation of government policy decisions, laws, rules, regulations and instructions of senior government administrators, except in important cases;
- performing executive secretarial duties for departmental heads or official committees;
- writing reports to inform or advise administrators on policy questions, departmental programmes and other matters;
- performing other duties delegated by senior government administrators;
- may work with the assistance of clerical and other staff;
- may direct a unit, section or local office of a government department in the implementation of government policy decisions and laws, rules and regulations;
- This occupation serves as the usual entry level into the government service for graduates from institutions of higher education who have been trained in subjects like management and business, law, economics or other social sciences or in the humanities. They usually work under the direction of more senior government administrators. Workers who carry out the tasks and duties of engineers, medical doctors etc. are not included.

(h) Messenger
Delivers messages, packages and other items to offices within an establishment or elsewhere;
walks or rides vehicles and delivers various items for employer, such as documents, files, packages and messages, within an establishment to other business concerns or elsewhere; carries out other errands as required.
May keep simple records an obtain receipts for articles delivered. May perform additional duties, such as those of receptionist, and be variously designated.

(i) Unskilled labourer
Executes tasks of a simple and routine nature, requiring mainly physical effort, but not necessitating previous experience of the work or exercise of personal initiative or judgment, e.g. cleaning up workplaces in factories, sweeping streets and clearing rubbish from parks and public gardens.

Appendix B

Questionnaire

Job grading in the public service

(1) List the different grades in the public service and state how they are grouped together into classes or categories.

(2) Please describe the general approach used for grading of posts and/or employees and how the related decisions are taken.

(3) (a) Is there a specified number of posts in each grade or category?
(b) If yes, how is this determined?

(4) (a) Are individuals allocated to a grade or category according to their formal qualifications or length of service?
(b) If yes, is there any limit or control on the number of people who may be in any particular grade? If so give details and say how the limits are determined.

(5) How are posts classified?

(a) By some informal assessment process?
(b) Are posts classified essentially according to the qualifications of the incumbents?
(c) Is job evaluation or some other formal assessment technique used? If yes, give details.

(6) Is there a body or organisation or part of central government administration responsible for determining and revising job grading and classification? If yes, provide details and copies of any reports it has issued.

(7) Specify any methods to control upward revision in job grading.

(8) State the number of posts or the number of individuals in each grade on each salary scale for each year since 1975.

(9) Specify the major changes in the job grading or classification of major occupational groups since 1975 and the numbers affected.(e.g. 250 technical assistants regraded from Grade 9 to Grade 7 in 1981.) If details are contained in government or other reports it will be sufficient to attach copies of the reports.

Salary scales

(10) Provide copies of all salary scales operative since 1975 and their date of implementation specifying the number and amount of each increment on each scale. If basic salary scales were unchanged but a cost-of-living adjustment or some other general increase was given please specify this and provide details of the general adjustment so that the nominal salary scales can be converted into 'effective' salary scales at each date.

(11) (a) State the jobs, occupations, grades or categories for which each of the salary scales apply in 1985.

(b) List all major changes in the classification of different posts, occupations or grades to individual salary scales since 1975.

(c) Are there some posts or individuals paid above or outside salary scales? If yes give the numbers and the range of their salaries, for each year since 1975.

(12) How many people in each grade were on each incremental step of each salary scale in 1985. If this is not known state the number of people on each salary scale or in each grade on the maximum of their salary scale.

(13) Under what conditions and how often are increments received?

(14) If there is a test of satisfactory performance or merit as a condition for receipt of an increment, or for passing an 'efficiency bar', specify the rules or conditions which have to be met and state the percentage of employees who fail to meet the requirements each year, if possible, showing each category or grade separately.

Allowances

(15) In addition to the usual increments is there any form of merit payment or increase in pay or accelerated increments for good performance? If Yes provide details of the amount and the conditions to be satisfied, and the numbers in each grade receiving such payment and eligible for consideration in 1985.

(16) List all other cash allowances or elements in pay in addition to basic salary, e.g. cost-of-living or dearness allowance, merit pay, housing allowance, washing allowance etc. State the amount of each allowance and the numbers in each grade receiving each payment. (Note, reimbursement of expenses incurred in the course of official duties such as refund of travel expenses or per diem payments or daily allowances when working away from the usual place of work should be excluded. However any general allowances or payments not specifically related to the actual amount of expense incurred, e.g. a flat-rate or percentage motor or bicycle allowance, should be included.)

Overtime

(17) Is overtime paid to public service employees? If so, to which grades, at what rate, after how many hours of normal work?

(18) State the average amount of overtime hours worked by each grade in 1985 (or during some period in 1985 or the most recent year for which information is available), the proportion of members of each grade receiving overtime payment and the average amount of overtime payment received by each grade.

Changes to Salary scales

(19) (a) Give details by categories or grades of how basic salary scales and allowances are revised, e.g. the role of an advisory or technical body submitting recommendations, collective bargaining, arbitration and/or unilateral government decision. What general principles or criteria, if any, are followed in fixing and adjusting salary scales?

(b) Is there a permanent or standing body such as a Civil Service or Public Service Pay Commission or Board responsible for examining and making recommendations on public service pay? If Yes give details and attach copies of any reports.

(c) Has there been any Committee of Inquiry or similar body specially set up to examine and report on public service pay since 1975? If Yes attach copies of their reports and of any published government response.

(20) (a) Are there any standing arrangements for periodic revision of salary scales or allowances, e.g. commitment to annual or biennal reviews, cost-of-living allowance, dearness allowance, or similar element in pay? If Yes give details.

(b) If any of these revisions are automatically linked to movements in a Consumer or Retail Price Index specify which index and the precise nature of the linkage .

Fringe benefits

Note: Fringe benefits will be regarded as all deferred or contingent payments such as pensions or retirement gratuities, death or disability payments and all non-cash benefits or payments in kind. Cash allowances included in Question 16 should not be included in replies to Questions in this section of the questionnaire.

(21) List each fringe benefit not listed in Question (16) and the number in each grade receiving each benefit in 1985. Include any special arrangements for access to consumer goods at government controlled prices.

(22) Do some individuals receive a cash payment in lieu of a benefit e.g. a housing allowance instead of free housing? If Yes state which benefit the in lieu allowance replaces, the numbers in each grade receiving it in 1985 and the average allowance paid.

If subsidised housing is available for public service employees indicate the numbers in each grade receiving it, and, if possible, the average cost of the subsidy. If this information is not available provide any information that is available to indicate the cost or value of subsidised housing.

(23) Specify the pension arrangements for public service employees?

(a) Do employees pay a contribution for their public service pension? If Yes give details of their contribution rates.

(b) At what age and/or after how many years of service can a public service employee receive a pension?

(c) How is the amount of pension calculated? If it is based on final salary, are allowances included in the calculation of salary for pension entitlement? If Yes, give details of all payments included.

(d) Give details of any lump sum cash payments or other retirement payments made to public service employees and state whether these are in addition to the retirement pension or options to the pension, e.g. whether all or part of the pension can be foregone in return for a lump sum payment.

(e) Are there any procedures for adjusting the amount of pension received by retired public sector employees to take account of inflation or salary charges? If Yes, give details.

Promotion

(24) In deciding whether an individual should be promoted what is the role of:

(a) length of service?
(b) competitive examination?
(c) merit? (explain how this is assessed)
(d) formal qualifications? (Are the possession of formal qualifications a minimum condition for promotion from some grades to others or do they carry an automatic entitlement to promotion?)

Indicate where the importance of these factors varies for promotion from different grades.

(25) Is special attention given to ethnic or regional factors when considering people for promotion? If yes give details and the number of promotions in each grade made as a result of such considerations.

(26) Are vacancies in higher graded jobs a necessary condition for promotion, or are individuals ever promoted to a higher grade or salary scale with no changes in their duties or job? If so give details of the grades in which this occurs and the number or proportion of such promotions in each grade.

(27) What proportion of each grade is promoted each year?

(28) Can individuals be promoted from one class or category into another, e.g. Executive or General Clerical to Administrative, or Technical to Administrative?

(29) If there are over-lapping salary scales, does promotion to a higher grade always lead to an increase in salary? If Yes give details of the arrangements made to ensure that a higher salary is paid on promotion.

(30) Is there a waiting list of people eligible and suitable for promotion but unable to obtain promotion because of limited vacancies in higher graded posts? If Yes give numbers by grade.

Recruitment

(31) State the grades into which new entrants from outside the public service are recruited and give the minimum education levels or other qualifications for each of these grades.

(32) On what basis or by what selection procedures are applicants recruited? e.g. competitive examination, minimum qualifications plus interviews or references. Indicate where different procedures apply to different grades.

(33) How many people were recruited from outside into each grade in 1985.

(34) (a) Does the government guarantee employment to a specified number of graduates of universities, colleges, high schools, or to those with other qualifications?

(b) If Yes, state the qualifications required and the grades into which these recruits enter.

(c) How many people were recruited into each grade as a result of this guarantee in 1985?

(d) Were other people recruited into these grades who did not come under the employment guarantee?

(e) Are graduates or others receiving state support for their education required to work in the public sector for a specified period? If Yes, give details.

(35) (a) How many unfilled vacancies were there for each grade in 1985? (Specify the date on which the vacancies existed.)

(b) What were the reasons for the unfilled vacancies?

(36) Do you have any evidence that the level or standard of applicants has been rising or falling in recent years? If so please provide details?

(37) (a) Are there special difficulties in recruiting suitably qualified members of certain grades or occupations?

(b) If Yes please give details.

(c) What action has been taken to try and overcome these difficulties?

<u>Retirements and resignations</u>

(38) Give the numbers leaving public service employment in each grade in 1985 (or for the latest year for which information is available):

(a) retirement
(b) voluntary resignation
(c) dismissal
(d) transfer to other employment
(e) other (specify if appropriate)

(39) State the number in each grade in employment in 1985 who were over the normal retiring age.

<u>Earnings</u>

(40) What were the average earnings by grade or salary scale of public service employees in 1985?

(41) The following occupations or jobs have been selected for comparison of the pay of public service employees with pay in other sectors. A brief job description indicating the level of the job is attached. Give the average earning and salary scale for (i) public service employees, (ii) other public sector or parastatal employees specifying which sector or parastatal the information refers to, (iii) private sector organisations specifying which main sectors or areas of activity the information refers to, if possible.

Give the date to which the information refers. If it is not possible to provide the information for 1985 please give it for the latest year available.

(a) Permanent secretary or head (non-minister) of a ministry or department. (Specify the comparable post in the parastatal or private sector).

(b) Clerk or clerical officer

(c) middle level executive official

(d) stenographer/typist, shorthand/typist

(e) computer programmer

(f) card and tape-punching machine operator

(g) junior administrative officer (the entry grade for university graduates to the administrative category)

(h) Messengers (if applicable state whether established/permanent or daily/casual)

(i) unskilled labourer (if applicable state whether established/permanent or daily/casual)

Employment costs

(42) Give the total public service pay-bill in 1985, or the latest year for which information is available. If the information does not refer to a calendar year, e.g., April-March, please indicate the coverage.

(a) total basic salaries

(b) total allowances

(c) total remuneration (a+b)

(d) Total cost of fringe benefits

(e) Total employment costs (c+d).

If this information is not available give the total pay-bill or total earnings for whatever public sector breakdown is available and specify the coverage and year.

(43) Give total Government current expenditure in 1985.

(44) (a) What is the total employment cost of the public service in 1985 including basic salaries, all allowances and all benefits in cash and in kind. Specify the items included in the total.

(b) What is the total cost to government of pension provision for public service employees in 1985? Indicate whether this is the total amount of equivalent employers' contributions paid by government and whether it includes contributions to a general superannuation scheme or National Provident Fund which covers employees outside the public service. Alternatively, indicate whether it is the total cost to government of making pension payments to public service employees who are currently retired.

Payment delays

(45) (a) Have there been any delays in payment of salaries or allowances to public service employees since 1975?

(b) If Yes, give details of the numbers and grades involved, the length of delay, the average amount of delayed payment, and the reasons for the delay.

Casual daily or non-permanent employees

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(46) How many casual or temporary employees were employed in each grade in 1985? State the date to which the information refers,e.g. 31 December or the average for a specified month or some other periods.

(47) What were their rates of pay or scales for these grades?

(48) (a) Do any of these employees perform the same duties as permanent or regular employees?

(b) If Yes give details of which grades of both types of employees perform the same duties.

(c) Are there any different educational or other qualifications for acceptance as casual or temporary employees as compared with regular employees in the equivalent grades?

(d) If Yes give details of the minimum qualifications for each grade of casual or temporary employee, as compared with those of regular employees.

(49) (a) Are there any differences in the entitlement of casual or temporary employees to receive any allowances or fringe benefits?

(b) If yes, specify the differences.

(c) If casual or temporary employees receive allowances and benefits, state the numbers in each grade receiving each allowance or benefit and the average amount paid. If the average amount paid or average amount of benefit is not available give the total cost.

(50) Do casual or temporary employees qualify for entitlement to a public service pension? If Yes give details of the qualifying conditions and amount of pension entitlement.

Part-time employees

(51) (a) Do you have provisions for the employment of part-time public service employees?

(b) If yes specify the definition of part-time, e.g. less than 20 hours a week, or less than half the normal working hours.

(c) Give the numbers employed in each grade and the date to which the information refers.

Other comments

(52) If you have any additional comments you wish to make or if there are any problems to which you wish to draw our attention on public service pay or employment please attach them on a separate sheet. Any additional information you think may be helpful should also be attached.

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(b) Clerk or clerical officer
Office clerk (ISCO 3-93.10)

Performs a variety of clerical tasks, such as those which follow, depending on nature and size of office in which employed:
examines incoming mail referred to him for attention and assembles information needed for preparation of reply; composes letters in reply to correspondence or telephone inquiries, or to obtain information, and initiates other routine correspondence; calculates and checks factors for costing, estimating, valuing or other purposes; collates sales records and gives instructions for preparation of invoices and other documents in connection with sales and deliveries; receives and interviews clients, employees, sales personnel or other callers, and arranges appointments and directs inquiries to appropriate persons or departments; keeps and balances accounts of financial transactions and prepares statements of accounts; computes time, output or other factors and calculates earnings or payments due; receives payments of accounts and issues receipts; receives, counts and pays out cash; prepares loss or damage reports and insurance claims; prepares, issues, receives or checks forms and documents in connection with the administration or national, regional or local government legislation or other matters; determines material and production requirements; prepares operational scheduled orders or received orders for material and merchandise; files vouchers, receipts, letters and other documents; arranges for the transport of freight and prepares relevant documents; deals with complaints; compiles statistical information; records issues of stationery and equipment to staff and maintains records as required.

(c) Government executive official (ISCO 3-10.10)
Central government executive official
(middle level)

Acts as member of a section or division of a department, ministry or agency of central government dealing with particular administrative and policy matters concerning such government services as domestic affairs, foreign affairs, defence, education, environment, health, social welfare, labour, social security, industry, agriculture, justice, finance, transport, communications, staffing and organisation of government services and other government functions; performs a variety of administrative and executive tasks under the general supervision of a higher level administrator or official:

consults higher level administrators or officials to obtain directions and indications of policy to be followed; implements policy decisions and the provisions of laws, rules and regulations and, as necessary, devises and advises on procedures for their implementation; participates in the preparation of legislation and of rules and administrative regulations to implement such legislation in matters for which the department, ministry or agency is competent; provides secretarial support for official committees, working parties, etc.; arranges internal meetings, prepares and circulates papers for discussion, takes minutes and ensures that follow-up action is taken; administers government grants and subsidies to agriculture, housing, health, social welfare, social security, and special categories of the population; inspects working conditions, including safety and health arrangements, in factories and other workplaces and enforces safety and health regulations; advises and informs on matters relating to the labour market, employment placement, vocational training and guidance; undertakes research not requiring specialised scientific, professional or technical qualifications, using such sources of information as government statistics, documents and files, publications and findings from academic circles and independant institutions and persons; makes comparative analyses and writes reprots on specific policy questions; inspects, analyses and reports on the organisation of work and methods used in government services and makes proposals for changes.

(d) Stenographer/typist (ISCO 3-21.10)

Takes direct dictation of correspondence, reports and other papers by hand or machine, and transcribes dictated materials into typewritten form:

records in shorthand, by hand or shorthand-writing machine, dictated letters, memoranda, reports or other matter; types matter from shorthand notes, written drafts, recordings on dictating machine or other sources and cuts stencils; uses manual, electric or electronic typewriter, or word-processor; may perform limited clerical duties.

(e) Computer programmer (ISCO 0-84.20)

Prepares programmes to control automatic processing of data by computer:

studies programme intent, output requirements, nature and sources of raw input data, internal checks and other controls required, or, where available, uses specifications and instructions prepared by systems analyst; breaks down problems delineated by systems analyst into their simplest elements; prepares, from this breakdown, detailed logical flow charts and diagrams to establish the order in which data is to be processed, the points where decisions must be made between alternative courses of action, and the sequence of operations involved; converts flow charts and diagrams into computer programme (the list of instructions which control the operation of the computer) using programme language; using programme language; converts the programme, or directs its conversion, into code form to derive machine-processable instructions suited to type of computer in use; conducts trial run with sample data to test validity and logic of programme; amends programme as necessary; compiles written instructions for computer-operating staff; corresta programme errors by such methods as altering programme steps and sequence; analyses, reviews and rewrites programmes to increase operating efficiency or adapt to new requirements.

(f) Card- and tape-punching-machine operator (ISCO 3-22.20)

Operates alphabetic or numeric key-punch machine, photo-composing perforating machines, special data-preparation equipmment to prepare data-processing input materials, and other data type machines similar in operation to an electric typewriter to convert data to machine readable data or to a screen with the help of a punchcard device, a punched paper tape recorder, a key-to-disc coder, magnetic tape/coder/screen/terminal, or to verify the correctness of punching:

loads machine with decks of cards or reels of magnetic or paper tapes; sets machine for recording operation and moves switches to select appropriate functions; sorts documents or listed items into chronological or other specified order where appropriate; depresses keys to record data from source material in the form of perforations on card or tape or make magnetic impressions; observes machine to deterct faulty operation; maintains record of work completed; handles programme punching, which includes the correction of clerical errors.

(g) Junior administrative officer (the entry grade for university graduates to the administrative category)

Their tasks and duties include:

- making decisions on matters arising in the detailed implementation of government policy decisions, laws, rules, regulations and instructions of senior government administrators, except in important cases;

- performing executive secretarial duties for departmental heads or official committees;

- writing reports to inform or advise administrators on policy questions, departmental programmes and other matters;

- performing other duties delegated by senior government administrators;

- may work with the assistance of clerical and other staff;

- may direct a unit, section or local office of a government department in the implementation of government policy decisions and laws, rules and regulations;

- This occupation serves as the usual entry level into the government service for graduates from institutions of higher education who have been trained in subjects like management and business, law, economics or other social sciences or in the humanities. They usually work under the direction of more senior government administrators. Workers who carry out the tasks and duties of engineers, medical doctors etc. are not included.

(h) Messenger

Delivers messages, packages and other items to offices within an establishment or elsewhere;

walks or rides vehicles and delivers various items for employer, such as documents, files, packages and messages, within an establishment to other business concerns or elsewhere; carries out other errands as required.

May keep simple records an obtain receipts for articles delivered. May perform additional duties, such as those of receptionist, and be variously designated.

(i) Unskilled labourer

Executes tasks of a simple and routine nature, requiring mainly physical effort, but not necessitating previous experience of the work or exercise of personal initiative or judgment, e.g. cleaning up workplaces in factories, sweeping streets and clearing rubbish from parks and public gardens.

Appendix C

Entry Grade Cohort

Individual: (Identification number of name)

Date (1)	Grade (2)	Salary Level (3)	Comment (4)
(1)			
(2)			
(3)			

The date of recruitment should be entered on Row (1)

Each change of salary or grade should be entered on a new Row with the effective date of the change shown in column (1)

The grade should be shown in column (2) and the salary received in column (3). The appropriate letter should be entered in column (4) to indicate the cause of the change in grade or salary level.

I - increment on the same salary scale

P - promotion to a different grade

S - general revision of the salary scale

Show periods of approved absence by:

E - absence on an education or training course

X - secondment to other employment, please indicate the nature of this employment and if possible the salary level

R - should be entered if the individual resigns

D - in the event of death of the individual

Z - if the individual is dismissed. Please indicate reasons for dismissal.

Appendix D

Current Grade Cohort

Individual: (Identification number of name)

	Date (1)	Grade (2)	Salary Level (3)	Comment (4)
(1)				
(2)				

Enter the current grade and salary level in Row 1 with the effective date of that salary level in column (1), and the cause of the change in column (4).

Enter the previous salary level in Row (2) with the grade and the cause of the change in column (4).

I - increment on the same salary scale

P - promotion to a different grade

S - general revision of the salary scale

Show periods of approved absence by:

E - absence on an education or training course

X - secondment to other employment. Please indicate the nature of this employment and if possible the salary level

R - should be entered if the individual resigns

D - in the event of death of the individual

Z - if the individual is dismissed. Please indicate reasons for dismissal.

APPENDIX E

Countries for inclusion in Detailed Questionnaire Survey

Algeria	Niger
Cameroon	Nigeria
Egypt	Sudan
Ethiopia	Tanzania
Ghana	Uganda
Ivory Coast	Zaire
Kenya	Zambia
Morocco	Zimbabwe
Mozambique	

THE WORLD BANK / INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

Date: March 6, 1986

To: Mr. Jacques Frémy, WAPAD

From: Claudine M. Morin, LEGWA CHM

Extension: 73497

Subject: CAMEROON - Educational and Vocational Training Project
Draft Contract between Governement and ILO

12 o

1. Further to my conversation with Mr. Raphaeli, PPDPR, I confirm that consultants and experts recruited by ILO with Bank financing have to be from countries eligible under Bank Guidelines and, therefore, the Bulgarian and Russian candidates proposed are not acceptable.

2. Other minor comments I have on the draft agreement of April 1985 are the following:

(a) the official name of Cameroon is "République du Cameroun" and no longer "République Unie du Cameroun";

(b) the name of the project is "Projet Education et Vocation Professionnelle" and no longer "Quatrième Projet Education";

(c) in the first and second Attendu, since the Bank loan will finance other components than the one assisted by ILO, I would suggest to say: "en vue, en particulier, du financement du projet de coopération technique..." and "le Gouvernement entend utiliser une partie du prêt pour confier...";

(d) in art. 1.1, the subcontractors should be selected after Government approval, not only after consultation.

(e) in the annex on "Calendrier des Paiements", the first payment should be linked either with the effectiveness of the Bank loan or the effectiveness of the ILO Agreement if art. 9 is modified to provide for cross-effectiveness with the Bank loan. Further payments would then be linked with the effectiveness of the ILO Agreement rather than with its signature.

cc. Messrs. Raphaeli, Ofosu-Amaah, Dupuy

P-1867

ILO MEMORANDUM BIT

c.c. Mr. Ayman, SEGEM Mr. Raphaeli, World Bank, Washington Mr. Schweitzer, World Bank, Washington	To / A: Mr. John Murray, Director, ILO Office, **ANKARA**
	From / De: **R.C. Murray, Chief, BUD/CT, GENEVA**
	Your Ref. / Votre — Date
	Our Ref. / Notre — Initial(e)s: RCM/ews — Date 21.2.1986

Subject / Objet: Blanket Withdrawal Application and Terms of Payment - SEGEM, Turkey, Contract

1. Further to our discussions with Mr. Ayman and his colleagues late last week and my telex to you last Monday, I am enclosing a copy of the standard form that is used for the application for withdrawal of the total estimated cost of services to be provided by UN agencies. This is the format used for the Appendix referred to in sub-paragraph 1 of paragraph 5 (re. Payment of Services) in Annex 1 to the World Bank's Policy Note No. 9.02. It follows that this format should also be included (without names, dates, etc. being filled in) as an addendum to the SEGEM contract.

2. I hope that the inclusion of this standard form in the SEGEM Contract will clarify the questions raised by Mr. Ayman and his colleagues in that:

(a) The application for withdrawal for the total of the cost of the services does not involve any allocation of funds to SEGEM's account as this has no doubt already been done by the IBRD, as indicated in the second line of paragraph 1 of the standard withdrawal application and as explained in the second sub-paragraph of the General paragraph of the IBRD/IDA booklet "Guidelines for Withdrawal of Proceeds of IBRD Loans and IDA Credits".

(b) In the light of the above it would not be appropriate to include in paragraph 5.1 of the SEGEM Contract any reference to the allocation of funds to SEGEM's loan account.

(c) The application for withdrawal for the total cost of the services does not commit SEGEM to immediate payment of the total cost of the services and does not commit SEGEM to payments in accordance with the indicative schedule of payments included in Annex VII (Financial Proposals).

(d) The application for withdrawal covers payments that will be eventually made in accordance with the provisions of sub-paragraphs 5.2 to 5.5 of the Contract.

contd.

3. As agreed by telephone this morning, I enclose a retyped amended version of Article 5 of the Contract which we hope can be agreed to by SEGEM.

4. Will you please pass the enclosed copy of this minute and its attachments to Mr. Ayman with our best regards.

Robert C. Murray

ANNEX VIII

Date:
Loan No.:
Application
Serial No.: ____________

The World Bank
1818 H Street, N.W.
WASHINGTON, D.C. 20433

Attention: Disbursements Division

Pursuant to the Loan Agreement for the Project dated between the International Bank for Reconstruction and Development and the undersigned , the undersigned hereby certifies and agrees as follows:

1. The undersigned hereby applies for the periodic disbursement from the account opened under the terms of the above-mentioned Agreement, of a sum not exceeding for the period commencing on or about to .

2. This sum is required to pay the International Labour Office (ILO) for technical assistance services eligible for financing under the terms of the above-mentioned Agreement.

3. Periodic disbursements will be made without prejudice to the right of the undersigned to dispute any amount claimed by the ILO and the undersigned will promptly notify the World Bank of any amount to be deducted from future payments. The undersigned reserves the right to terminate this arrangement by notice to the World Bank with respect payments not yet made.

4. At the date of this application there is no existing default under the said Loan Agreement; and, to the best of the undersigned's knowledge and belief, of the Guarantor under the Guarantee Agreement (if any) referred to therein.

Please make payment from the Loan Account on receipt of invoices from the ILO submitted in accordance with the terms of Article 5 (Payment for Services) of the attached copy of the agreement between the undersigned and the ILO which forms an integral part of this application.

____

(Name of Borrower)

____

(Authorised Representative)

Copy to: The International Labour Office,
Budget and Finance Branch,
4 route des Morillons,
1211 GENEVA 22, Switzerland.

Article 3: Approval of Subcontractors

The ILO may, in agreement with SEGEM, execute part or all of the project by subcontract. The selection of sub-contractors shall be made, after consultation with SEGEM, in accordance with ILO procedures and any provisions in the loan agreement with IBRD.

Article 4: Cost of Services

The total cost of the services is estimated at US $1,869,275 including technical backstopping, supervision and programme support costs.

Article 5: Payment of Services

5.1 SEGEM undertakes, promptly after the effective date as refferred to in Article 6 of this Agreement, to submit to IBRD an application for withdrawal copied to the Budget and Finance Branch of the ILO in the form shown in Annex VIII covering the total estimated cost of the services to be provided under this Agreement. Disbursements against this application for withdrawal will be in accordance with sub paragraphs 5.2 to 5.5 below.

5.2 SEGEM, upon the effective date of this Agreement will also instruct IBRD to pay the ILO the initial payment of US$75,150 as indicated in the Schedule of Payments listed in the Financial Proposal which is Annex VII and one of the Addenda to this Agreement. All payments to the ILO by IBRD will be made to the account specified in Article 5.4 of this Agreement.

Contd/...

It is acknowledged by SEGEM that ILO will only commence the provision of the services when the payment referred to in this sub-article has been received.

5.3 After the initial payment to the ILO, subsequent payments will be made to the ILO by IBRD in accordance with statements of account to be submitted by the ILO to IBRD and to SEGEM. Statements of account will be submitted at the intervals set out in the schedule of indicative payments included in Annex VII to this Agreement, and will be based on actual expenditure incurred plus an estimate of expenditure for the following three months less amounts received by the ILO to date. The statements of account will be forwarded by ILO Geneva to SEGEM by registered express post. Within 10 days of receipt of the ILO statements of account by SEGEM, IBRD will be notified by SEGEM by telex copied to ILO of SEGEM's agreement to the payment of ILO's statement of account. If SEGEM disputes any item included in ILO's statement of account it will immediately contact the ILO to resolve any such disputed item. If within 10 days of receipt of ILO's statement of account by SEGEM, any disputed item has not been resolved, SEGEM will notify IBRD by telex copied to ILO of the disputed items to be deducted from the ILO statement of account and will give its agreement to IBRD to the payment of the balance of the ILO statement of account. If within 15 days of receipt of ILO's statement of account, IBRD has not been notified by SEGEM by telex of its agreement to payment of ILO's statement of account in accordance with the above provisions, IBRD will make payment of ILO's statement of account without prejudice to SEGEM's right to dispute any amount claimed by the ILO and instruct IBRD to adjust any future payment by the amount in dispute.

Contd/...

5.4 All IBRD payments to the ILO, unless otherwise agreed, shall be made in US Dollars to Lloyds Bank PLC, Place Bel Air, Geneva, Switzerland (in favour of ILO Account No. 1982).

5.5 Should unforseen circumstances related to project activities occur, SEGEM and the ILO would meet to agree on appropriate action.

D1039

cc Mr. Schweitzer
EMENA

ZCZC DIST0266 RCA6097
PPDPR
REF : TCP FCA

RCA6097
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22271X BIT CH

1348600 (ILO) GENEVA 26FEB86 1327Z

WORLD BANK WASHINGTON
ILO K70198 TO MURRAY COPY BARTSCH COPY RAPHAELLI AND SCHWEITZER PLEASE CONVEY FOLLOWING TO SEGEM FROM VON MUTIUS EYE CAN UNDERSTAND THAT IN VIEW OF THIS BEING FIRST EXPOSURE TO TOTAL WITHDRAWAL APPLICATION PROCEDURE SEGEM HAS SOME HESITANCY IN ACCEPTING THE PROCEDURE BUT EYE WOULD CONFIRM THAT AS SHOWN BY WORLD BANK OPERATIONS POLICY STATEMENT NO 9.02 IT IS A NORMAL PROCEDURE FOR CONTRACTS WITH UN AGENCIES AND DOES NOT INVOLVE ADDITIONAL PAYMENT OF INTEREST AS INTEREST IS ONLY PAYABLE WHEN ACTUAL DISBURSEMENTS ARE MADE IN ACCORDANCE WITH SUB ARTICLES 5.2 TO 5.5 OF THE CONTRACT STOP MOST IMPORTANT THIS PROCEDURE HAS BEEN FOUND TO BE A VERY EFFECTIVE AND EQUITABLE MEANS OF ENSURING THE SMOOTH IMPLEMENTATION OF PROJECTS AS IT ASSISTS IN ENSURING A REGULAR FLOW OF CASH WHILE ASSURING THAT THE BORROWER HAS ADEQUATE SAFEGUARDS TO PROTECT AGAINST EXCESSIVE PAYMENTS STOP EYE HAVE REQUESTED MR RAPHAELI OF THE PROJECTS POLICY DEPARTMENT OF THE WORLD BANK TO CONFIRM TO THE ILO ANKARA OFFICE THAT THIS IS AN ACCEPTED AND VERY EFFECTIVE PROCEDURE AND WOULD HOPE THAT IN THE LIGHT OF THESE ASSURANCES SEGEM COULD AGREE TO THE USE OF THE PROCEDURE SO THAT IMPLEMENTATION OF THIS VERY WORTHWHILE PROJECT CAN BE STARTED SOON AS POSSIBLE STOP EYE WOULD ASSURE YOU THAT THE ILO AS A MAJOR UNITED NATIONS AGENCY OF WHICH TURKEY IS A MEMBER STATE HAS THE PRIME OBJECTIVE OF IMPLEMENTING THIS PROJECT IN THE MOST EFFECTIVE MANNER POSSIBLE AND HAS NO INTEREST IN INTRODUCING FINANCIAL PROCEDURES THAT WOULD IN ANY WAY PLACE SEGEM IN A POSITION OF FINANCIAL DISADVANTAGE STOP WITH BEST REGARDS AND SINCERELY VON MUTIUS, ASSISTANT DIRECTOR GENERAL/TREASURER AND FINANCIAL COMPTROLLER (INTERLAB GENEVA 26.2.86)

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ALT RTD FROM:PPRM

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ZCZC DIST0266 RCA6097
PPDPR
REF : TCP FCA

cc Mr. Schwaiger
EMENA

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1348600 (ILO) GENEVA 26FEB86 1327Z

WORLD BANK WASHINGTON
ILO K70198 TO MURRAY COPY BARTSCH COPY RAPHAELLI AND
SCHWEITZER PLEASE CONVEY FOLLOWING TO SEGEM FROM VON MUTIUS EYE
CAN UNDERSTAND THAT IN VIEW OF THIS BEING FIRST EXPOSURE TO
TOTAL WITHDRAWAL APPLICATION PROCEDURE SEGEM HAS SOME HESITANCY IN
ACCEPTING THE PROCEDURE BUT EYE WOULD CONFIRM THAT AS
SHOWN BY WORLD BANK OPERATIONS POLICY STATEMENT NO 9.02 IT IS A
NORMAL PROCEDURE FOR CONTRACTS WITH UN AGENCIES AND DOES
NOT INVOLVE ADDITIONAL PAYMENT OF INTEREST AS INTEREST IS ONLY
PAYABLE WHEN ACTUAL DISBURSEMENTS ARE MADE IN ACCORDANCE WITH SUB
ARTICLES 5,2 TO 5,5 OF THE CONTRACT STOP MOST IMPORTANT THIS
PROCEDURE HAS BEEN FOUND TO BE A VERY EFFECTIVE AND
EQUITABLE MEANS OF ENSURING THE SMOOTH IMPLEMENTATION OF PROJECTS
AS IT ASSISTS IN ENSURING A REGULAR FLOW OF CASH WHILE
ASSURING THAT THE BORROWER HAS ADEQUATE SAFEGUARDS TO PROTECT
AGAINST EXCESSIVE PAYMENTS STOP EYE HAVE REQUESTED MR RAPHAELI OF
THE PROJECTS POLICY DEPARTMENT OF THE WORLD BANK TO CONFIRM TO THE
ILO ANKARA OFFICE THAT THIS IS AN ACCEPTED AND VERY EFFECTIVE
PROCEDURE AND WOULD HOPE THAT IN THE LIGHT OF THESE
ASSURANCES SEGEM COULD AGREE TO THE USE OF THE PROCEDURE SO THAT
IMPLEMENTATION OF THIS VERY WORTHWHILE PROJECT CAN BE STARTED
SOON AS POSSIBLE STOP EYE WOULD ASSURE YOU THAT THE ILO AS A MAJOR
UNITED NATIONS AGENCY OF WHICH TURKEY IS A MEMBER STATE HAS
THE PRIME OBJECTIVE OF IMPLEMENTING THIS PROJECT IN THE MOST
EFFECTIVE MANNER POSSIBLE AND HAS NO INTEREST IN INTRODUCING
FINANCIAL PROCEDURES THAT WOULD IN ANY WAY PLACE SEGEM IN A
POSITION OF FINANCIAL DISADVANTAGE STOP WITH BEST REGARDS AND
SINCERELY VON MUTIUS, ASSISTANT DIRECTOR GENERAL/TREASURER AND
FINANCIAL COMPTROLLER (INTERLAB GENEVA 26.2.86)

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ALT RTD FROM:PPRM

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FORM NO. 27 - OCR (3/82)

WORLD BANK OUTGOING MESSAGE FORM Cable, Telex

IMPORTANT—PLEASE READ INSTRUCTIONS BELOW BEFORE TYPING FORM

Typewritten Character Must Fall Completely in Box!

PAGE 1 OF 1 | OFFICIAL DEPT/DIV ABBREVIATION: PPDPR | MESSAGE NUMBER: | TEST NUMBER (FOR CASHIER'S USE ONLY):

START HERE

INTERLAB, ANKARA. FOR JOHN MURRAY. IN RESPONSE TO QUERY FROM ILO HQ THIS IS TO CONFIRM THAT BLANKET WITHDRAWAL APPLICATION IS NORMALLY USED BY UN AGENCIES PROVIDING MANAGEMENT SERVICES IN CONNECTION WITH BANK-FUNDED PROJECTS AND IT IS IN CONFORMITY WITH BANK OPERATIONAL POLICY NOTE 9.02 MADE AVAILABLE TO ILO. REGARDS, RAPHAELI, ADVISER, UN/UNDP OPERATIONS, INTBAFRAD, WASHINGTON.

Murray 997-379

telex # 44684, UNDEVRO or 42684 UNDP

END OF TEXT

PINK AREA TO BE LEFT BLANK AT ALL TIMES

INFORMATION BELOW NOT TO BE TRANSMITTED

CLASS OF SERVICE: | TELEX NO.: | DATE: 2/25/86

SUBJECT: ILO

DRAFTED BY: NRaphaeli:vcc | EXTENSION: 76955

CLEARANCES AND COPY DISTRIBUTION:

AUTHORIZED BY (Name and Signature): Nimrod Raphaeli

DEPARTMENT: PPD

SECTION BELOW FOR USE OF CABLE SECTION

CHECKED FOR DISPATCH

DISTRIBUTION: WHITE—File Copy CANARY—Bill Copy WHITE—Transmittal Copy BLUE—Originator to Keep

D 1012

ZCZC DIST8456 RCA3611
PPDPR
REF : TCP FCA

cc. Ms Pellegrini

RCA3611
248423 WORLDBANK
22271Y BIT CH

1338646 (ILO) GENEVA 14FEB86 1103Z

WORLD BANK WASHINGTON
ILO K70139 TO RAPHAELI FROM MURRAY BUDFIN. FURTHER MY TELEX
K70115, DISBURSEMENTS TO EQUIPMENT SUPPLIERS CY85 WERE DOLLARS
3,953,462. REGARDS (INTERLAB GENEVA) 14.2.86

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WORLD BANK WASHINGTON
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K70115, DISBURSEMENTS TO EQUIPMENT SUPPLIERS CY85 WERE DOLLARS
3,953,462. REGARDS (INTERLAB GENEVA) 14.2.86

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cc. Ms Pellissier

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WORLD BANK WASHINGTON
ILO K70139 TO RAPHAELI FROM MURRAY BUDFIN. FURTHER MY TELEX
K70115, DISBURSEMENTS TO EQUIPMENT SUPPLIERS CY85 WERE DOLLARS
3,953,462. REGARDS (INTERLAB GENEVA) 14.2.86

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ALT RTD FROM:PPRM

NNNN

Washington D.C. Feb 6th 1986

INTERNATIONAL LABOR OFFICE

WASHINGTON BRANCH

1750 NEW YORK AVENUE, N.W.
WASHINGTON, D.C. 20006

TELEPHONE: (202) 376-2315
CABLE: INTERLAB WASHINGTON
TELEX: 248513

TO; Mr Nimrod Raphaeli/WB/PPDPR

FROM; MR Rauli Suikkanen/ILO/Washington

Re; our phonediscussion on February 6th 1986; Guinea crêdit

Please find enclosed our correspondence related to the " agency costs " problem we discussed on the phone. I hope this will clarify the situation. As you can find from the memorandum dated on August 15th 1985, Mr Bartsch has had some discussions with Mr Cadarion on August 1986. ILO:s poin of wiev is that 13 % overhead cost rate applies to all componenets in the project budget (also per diem and airtickets). Mr Cadario does not accept agency costs related to " reimbursables ". We understand that Mr Cadario is following the advise of Banks Consultant Services Advisers Office.

I thank You very much for your co-operation and apologize that I was not able to explain the problem clearly enough during our phonediscussion.

Rauli S.

Rauli Suikkanen
Liaison Officer

(GUINEA) (IDA)

ILO MEMORANDUM BIT

C.C.

To / A: Mr. Rauli Suikkanen, INVEST, Geneva

From / De: William H. Bartsch, Senior Liaison Office

WASHINGTON BRANCH—1750 New York Ave., N.W., Washington, D.C. 20006 USA

Your Ref. / Votre: TAP 3-06
TAP 3-06-159
Memo, August 5, 1985 Date

Our Ref. / Notre: Memo, August 15, 1985

Date 15.08.85

Subject / Objet: ILO Agency Costs under IDA-Financed Guinea Technical Assistance Project

1. I have spoken to Mr. Cadario on this subject. He maintains that he will not accept an ILO 13% agency cost on that part of the expenditures under our proposed FIT agreement with Guinea which he calls "reimbursables" -- the costs of air tickets and per diems. He argues that the ILO is acting as a consultant in providing services to the Guinea Government, and that the ILO (or any UN agency) must follow the position of the Consultant Services Adviser's office that no overhead be charged by a consultant on such "reimbursables" and Mr. Cadario has agreed with its point that if a private consultant cannot charge overhead on them, why should the ILO be allowed to do so?

2. I explained to Mr. Cadario that we have never faced this issue before in our FIT agreements with Bank borrower countries and that it was standard ILO (and UN) policy to charge the 13% on the total package of ILO assistance. I suggested he discuss the matter with Mr. Raphaeli, but Mr. Cadario indicated that it was his understanding that Mr. Raphaeli supports the UN organizations on this issue. However, Mr. Raphaeli's colleagues Messrs. Cooper and Spier reportedly disagree with him. I indicated I'd like a Bank-wide decision on this matter, as it will affect all our Bank-financed projects and we don't want to operate under different rules for each Bank officer.

3. Mr. Cadario seemed unconcerned with the matter except as it affected his project. He suggested that if an arrangement were made whereby the $300,000 IDA payment for the ILO component of the project were turned over to the UNDP, the UNDP might consider agreeing to pay the full 13% (including that covering reimbursables from its own resources) to the ILO in designating it to execute the project. Another possibility would be for the ILO to jack up its costs elsewhere in the project to cover the offending amount.

ILO 24 2.69

4. Perhaps we might consider one of the above alternatives? But in principle I agree with Mr. Weder that we should not seek to "hide" any of our agency costs in the project budget under another rubric. The best would be for the Bank to take a formal decision on this matter and communicate it to us (and other UN agencies) so that we could devise a means to meet the problem. If the Bank response is negative towards agency costs on "reimbursables", might we not increase our agency costs to, say 15 per cent, on the acceptable items to cover the shortfall on the reimbursable items?

5. I have also checked with Mr. Raphaeli on this matter. He indicates that he has not talked to Mr. Cadario about the Guinea problem, but will do so. I asked him if we could have a Bank-wide decision on this matter. I hope to hear from him soon on this subject.

WHB/mkb

GUINEA

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INTERLAB WASHINGTON
A2905 SUIKKANEN FROM INOUE INVEST RE COMPONENT QUOTE PROGRAMME DE FORMATION ET DE PERFECTIONNEMENT DES COMPTABLES ET AUDITEURS DU SECTEUR PUBLIC ET PARAPUBLIC UNQUOTE OF IDA GUINEA CREDIT QUOTE ASSISTANCE TECHNIQUE POUR LA GESTION DE L'ECONOMIE UNQUOTE. PLEASE REFER TO BARTSCH'S MEMO OF 15 AUGUST 1985 WITH NO REFERENCE NUMBER ADDRESSED TO YOURSELF INVEST ENTITLED QUOTE ILO AGENCY COST UNDER IDA FINANCED GUINEA TECHNICAL ASSISTANCE PROJECT UNQUOTE. ILO EXECUTED FIRST PHASE OF ABOVE COMPONENT WHICH HAS NOW BEEN COMPLETED. F/MAN MISSION LEAVING NEXT MONDAY TO COUNTRY TO WORK OUT PRODOC OF PHASE II AND GOVERNMENT/ILO AGREEMENT. TOTAL AMOUNT WOULD BE SOME DOLLARS 380,000. IN THIS CONNECTION ON 28 JANUARY COULIBALY OF F/MAN SPOKE WITH CADARIO WA2DB ON LATTER'S POSITION ON 13 PER CENT AGENCY COSTS. CADARIO REAFFIRMED HIS EARLIER POSITION DESCRIBED IN BARTSCH MEMO MENTIONED ABOVE. UNDER CIRCUMSTANCES KINDLY URGENTLY ASK RAPHAELI TO TALK TO CADARIO AGAIN ON THIS ISSUE AND LET ME KNOW OUTCOME ASAP. EYE UNDERSTAND CADARIO'S COLLEAGUE WILL JOIN F/MAN MISSION IN COUNTRY. THANKS AND REGARDS. INTERLAB GENEVE 06/02/86

URGENT ACTION

248513 ILOW UR

22271Y BIT CH

RAPHAELI

have you seen this?

NNNN
845 22271+
INTERLAB GENEVA - INOUE FROM SUIKKANEN   RAPHAELI'S TELEX TO
VON MUTIUS COPY YOU ABOUT WB DISBURSEMENTS TO ILO SUBCONTRACTORS.
RAPHAELI NEEDS INFORMATION URGENTLY FOR HIS REVIEW OF WB
DISBURSEMENTS TO UN AGENCIES. PLSE INFORM STATUS. REGARDS.

INTERLAB WASHINGTON   3199   06.02.86

RCA DATABANK MSG 1893 TO 248513 RCVD FEB 10 05:07

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INTERLAB WASHINGTON
A3036 SUIKKANEN FROM INOUE REYOUR 3199 RAPHAELI'S REQUEST WB
DISBURSEMENTS TO ILO SUBCONTRACTORS. MURRAY BUD/CT WILL CONTACT
RAPHAELI SHORTLY REGARDS   INTERLAB GENEVE   10.2.86

FORM NO. 27 - OCR
(3/82)

WORLD BANK OUTGOING MESSAGE FORM Cable, Telex

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1	1	PPDPR		

START HERE

ILO, GENEVA. FOR VON MUTIUS AND MURRAY. FOLLOWING PHONE CALL SPOKE TO SCHWEITZER. HE CALLED SEGEM AND IS CONFIDENT ISSUES RESOLVED EXCEPT THAT SEGEM FAVORS THREE INSTEAD OF SIX MONTH ADVANCE PAYMENT. LET US KNOW IF YOU ENCOUNTER PROBLEMS IN ANKARA. REGARDS, RAPHAELI.

END OF TEXT

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CLASS OF SERVICE:	TELEX NO.:	DATE: 2/11/86
SUBJECT: ILO	DRAFTED BY: NRaphaeli:vcc	EXTENSION: 76956
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WASHINGTON D.C. FEB 11TH 8

With the Compliments of

WASHINGTON BRANCH

INTERNATIONAL LABOR OFFICE

1750 New York Ave., N.W., Washington, D.C. 20006

Tel.: (202) 376-2315

MR RAPHAELI/WB/PPDPR (D 1041)

Pls find enclosed telexcommunications related to the Guinea project we discussed some time ago. As you can notice from Mr Inoue's telex nr A3111 dated on 11.2.86 ILO does not fully agree with the Bank on this issue. However Bill Bartsch will co act you again after he has returned from Marshall Islands at the end of this week.

Best regards.

Rauli Suikkanen
Liaison Officer

RCA DATABANK MSG 1900 TO 248513 RCVD ~~FEB~~ 11 08:19

248513 ILOW UR

GUINEA

13% AGENCY COSTS

22271Y BIT CH

1334810 (ILO) GENEVA 11FEB86 1318Z

INTERLAB WASHINGTON
A3111 SUIKKANEN FROM INOUE INVEST. THANKS YOUR 3211 ON GUINEA CREDIT, AM AFRAID THERE IS SOME MISUNDERSTANDING ON BANK PART ON WHOLE ISSUE. WHEN SERVICES OF ILO OFFICIAL/CONSULTANT IS REQUESTED BY BANK NORMALLY TICKET AND PER DIEM ARE ARRANGED AND PROVIDED BY BANK DIRECT TO PERSON CONCERNED. THEREFORE ILO DOES NOT CHARGE 13 PERCENT ON AMOUNT INVOLVED. IT CHARGES 13 PERCENT ONLY ON REMUNERATION WHICH IS NORMALLY USDLRS 240. HOWEVER WHEN ILO EXECUTE BANK FINANCED PROJECT FOR PARTICULAR GOVERNMENT ALL BACKSTOPPING DONE BY ILO AND THEREFORE IT IS LOGICAL TO CHARGE 13 PERCENT ONTOTAL PROJECT COSTS INCLUDING TICKETS AND PER DIEM. ALL THE BANK FINANCED PROJECTS ILO HAS EXECUTED HAVE BEEN BUDGETED ON THIS BASIS AND BANK HAS ACCEPTED THIS PRINCIPLE . GRATEFUL RENEGOTIATE MATTER UPON BARTSCH RETURN. REGARDS INTERLAB GENEVE 11.2.86

NNNN
845 22271+
INTERLAB GENEVA - INOUE FROM SUIKKANEN REYOUR A.2905 GUINEA CREDIT. RAPHAELI INFORMS BANK'S POLICY NOT TO PAY 13% AGENCY COSTS RELATED REIMBURSABLES (AIR TICKETS AND PER DIEM) HE DISCUSSED MATTER WIDELY WITHIN BANK AND THIS BANKWIDE DECISION. IF YOU DISAGREE WE CAN HAVE FURTHER NEGOTIATIONS AFTER BARTSCH RETURNS. REGARDS.

INTERLAB WASHINGTON 3211 07.02.86
.....

RCVD 058257 THRU 058261

FORM NO. 27 - OCR
(3/82)

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ILO, GENEVA. FOR MURRAY BUDFIN. THANKS URTEL. DISBURSEMENTS TO EQUIPMENT SUPPLIERS CY85 WILL SUFFICE. THANKS AND REGARDS, RAPHAELI, WORLD BANK.

END OF TEXT

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REF : TCP FCA

RCA2227
248423 WORLDBANK
22271X BIT CH

1332078 (ILO) GENEVA 07FEB86 1350Z

WORLDBANK WASHINGTON
ILO K70115 FOR RAPHAELI FROM MURRAY BUDFIN INFO REQUESTED YOUR TELEX TO VON MUTIUS AS FOLLOWS AAA ZERO DISBURSEMENTS MADE TO SUBCONTRACTORS IN CY84 AND CY85. BBB DISBURSEMENTS MADE TO EQUIPMENT SUPPLIERS IN CY84 WERE DOLLARS 9,041,575 AND L985 FIGURE WILL BE FINALISED NEXT WEEK AND TELEXED TO YOU. CCC PLEASE ALSO CLARIFY REQUEST FOR ALL DISBURSEMENTS TO ILO, DO YOU REQUIRE DISBURSEMENTS CY85 SIMILAR TO CY84 DISBURSEMENTS SHOWN IN DISBURSEMENT SUMMARIES ISSUED BY BANK INTERNAL RELATIONS DEPARTMENT IN EARLY L985. REGARDS (INTERLAB GENEVA) 7.2.86

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1332078 (ILO) GENEVA 07FEB86 1350Z

WORLDBANK WASHINGTON
ILO K70115 FOR RAPHAELI FROM MURRAY BUDFIN INFO REQUESTED YOUR TELEX TO VON MUTIUS AS FOLLOWS AAA ZERO DISBURSEMENTS MADE TO SUBCONTRACTORS IN CY84 AND CY85. BBB DISBURSEMENTS MADE TO EQUIPMENT SUPPLIERS IN CY84 WERE DOLLARS 9,041,575 AND L985 FIGURE WILL BE FINALISED NEXT WEEK AND TELEXED TO YOU. CCC PLEASE ALSO CLARIFY REQUEST FOR ALL DISBURSEMENTS TO ILO, DO YOU REQUIRE DISBURSEMENTS CY85 SIMILAR TO CY84 DISBURSEMENTS SHOWN IN DISBURSEMENT SUMMARIES ISSUED BY BANK INTERNAL RELATIONS DEPARTMENT IN EARLY L985. REGARDS (INTERLAB GENEVA) 7.2.86

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WORLDBANK WASHINGTON
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ILO, GENEVA. FOR MR. VON MUTIUS, INFO MR. INOUE. BECAUSE OF ACCOUNTING PROCEDURES AT BANK WE ARE UNABLE TO ESTABLISH SIZE OF DISBURSEMENTS MADE DIRECTLY TO ILO SUBCONTRACTORS FROM BANK LOANS AND CREDITS. WOULD BE GRATEFUL FOR FIGURES FOR CY84 AND CY85 INCLUDING ALL DISBURSEMENTS TO ILO. REGARDS, RAPHAELI, WORLD BANK.

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SUBJECT: ILO

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THE WORLD BANK / INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

DATE December 13, 1985

TO Mr. Attila Karaosmanoglu, AENVP

FROM Nimrod Raphaeli, Adviser, UN/UNDP Operations

EXTENSION 76955

SUBJECT ILO Procurement

I am afraid I had left you the other day with less than completely accurate picture about the role of ILO as a procurement agent for Bank borrowers. Let me clarify.

ILO's procurement is channelled through a unit called EQUIPRO. This unit is prepared to assist member countries to prepare tender documentation and specs, do bid analysis, undertake purchases, and coordinate deliveries. Equipment bought is tied to vocational training projects. It includes principally machine tools, measuring and testing equipment, general workshop equipment, hand and power tools, teaching aids and audio-visual equipment, office equipment and supplies and all types of vehicles.

This is a rapidly growing business for ILO and it is performed to the utmost satisfaction of the Bank.

NRaphaeli:vcc

Chron

December 11, 1985

Mr. Rajagopalan

Subject: ILO--Mr. Srinivasan

When I was recently at ILO, many of my interlocutors, including the Assistant Director General Mr. von Mutius, took the occasion to thank the Bank for making Srinivasan available to conduct a seminar at ILO. His performance was described as outstanding and his grasp and presentation of the material were most impressive.

I thought you should know.

N. Raphaeli

THE WORLD BANK/INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

DATE October 16, 1985

TO Distribution List Below

FROM A. Aime A.E. Aime

EXTENSION 75291

SUBJECT Meeting with Mr. Srinivasan Regarding ILO Procurement and Disbursement Seminar

1. As requested, I attended the meeting mentioned in the attached memorandum on October 4, 1985.

2. The meeting had representatives from East Africa, West Africa, and Emena regions. The three regions have had positive experiences with EQUIPRO the procurement unit of ILO. They are extremely efficient and capable to undertake all aspects of procurement. They can act as a procurement agency and would like to be considered for more WORLD BANK activities. EQUIPRO has developed excellent computerized programs for all stages of procurement and are willing to assist member countries prepare tender documentation, prepare specs, do bid analysis, undertake purchases, and coordinate deliveries. They are a little expensive according to the BANK colleagues present at the meeting but due to their excellent performance they are highly recommended. It appears that they would be willing to hold seminars in-country on procurement.

3. The meeting suggested to Mr. Srinivasan that he investigate the possibilities of EQUIPRO holding a seminar at the WORLD BANK during which they would demonstrate their computerized programs and explain in more details their potential involvement in BANK projects.

4. During his forthcoming visit to Geneva Mr. Srinivasan was asked to discuss the possibilities of EQUIPRO holding training seminars in the countries and to find out how these costs could be covered.

5. Following his return from Geneva Mr. Srinivasan will advise the REGIONS on the conclusions of his discussions with ILO.

Attachment

Distribution: Messrs. Gilpin, Maas(o/r), Sung, McGough(o/r) (AEPED); Srinivasan (PPDPC); Country Coordinators

AEAime:spl

P 1866

BUREAU INTERNATIONAL DU TRAVAIL
INTERNATIONAL LABOUR OFFICE
OFICINA INTERNACIONAL DEL TRABAJO

Genève **Geneva** **Ginebra**

25 October 1985

Mr. Nimrod Raphaeli
PPDPR
The World Bank
1818 H Street, N.W.
WASHINGTON, D.C. 20433
(U.S.A.)

With the compliments of
the Investment Unit
Bureau of Technical Co-operation

Avec les compliments de
l'Unité d'investissement
Bureau de coopération technique

Con la mayor consideración
de la Unidad de Inversión
Oficina de Cooperación Técnica

--- Please find attached our ILO Governing Body paper GB. 225/OP/3/6.

K. Inoue

K. Inoue

INTERNATIONAL LABOUR OFFICE
BUREAU INTERNATIONAL DU TRAVAIL
OFICINA INTERNACIONAL DEL TRABAJO

GOVERNING BODY
CONSEIL D'ADMINISTRATION
CONSEJO DE ADMINISTRACION

GB.225/OP/3/6
225th Session

Geneva,
February-March 1984

COMMITTEE ON OPERATIONAL PROGRAMMES

COMMISSION DES PROGRAMMES D'ACTIVITES PRATIQUES

COMISION DE PROGRAMAS DE ACTIVIDADES PRACTICAS

Third item on the agenda

REVIEW OF THE ILO FELLOWSHIP PROGRAMME

Contents

5375R/v.2

INTERNATIONAL LABOUR OFFICE
BUREAU INTERNATIONAL DU TRAVAIL
OFICINA INTERNACIONAL DEL TRABAJO

GB.225/OP/3/6
225th Session

GOVERNING BODY
CONSEIL D'ADMINISTRATION
CONSEJO DE ADMINISTRACION

Geneva,
February-March 1984

COMMITTEE ON OPERATIONAL PROGRAMMES
COMMISSION DES PROGRAMMES D'ACTIVITES PRATIQUES
COMISION DE PROGRAMAS DE ACTIVIDADES PRACTICAS

Third item on the agenda

REVIEW OF THE ILO FELLOWSHIP PROGRAMME

Introduction

1. At its 221st Session (November 1982) the Governing Body undertook a review of technical co-operation inputs concerning experts, counterparts, fellowships and equipment. The present paper is intended to provide further background information on one of these items, the fellowship component in technical co-operation.

2. There are several reasons why a study of this subject is opportune at this time:

- Fellowship projects or individual fellowship components of technical co-operation projects represent an increasing proportion of ILO operational activities. Fellowship programmes have increased their share of total expenditure from 5.8 per cent in 1972 to 12.6 per cent in 1982. The number of fellowship holders participating in programmes administered by the Turin Centre increased from 1,211 in 1972 to 1,980 in 1982. However, in respect of the period 1970-1980, compared with the previous ten years, the number of ILO executed technical co-operation programmes increased and, as the majority of these programmes contained fellowship components, the number of fellowships administered and executed by the ILO, and in particular by the ILO Turin Centre, substantially increased. Recently, a trend towards stagnation, or even regression, has been noted, mainly due to funding difficulties experienced by the UNDP.

5375R/v.2

- Beneficiary governments are tending to place more emphasis on training their national staff and technical co-operation project counterparts, rather than on increasing the number, or extending the period of stay of international experts.

- Training programmes specially designed and executed recently at the Turin Centre, which have included direct learning periods in industrial or commercial enterprises and institutions, meet the specific needs of national staff holding key posts and counterpart fellowship holders. This development has been noted by government officials from member States during visits to the Turin Centre, who have then required chief technical advisers to include this option in their design of fellowship programmes.

- The role and function of national staff vis-à-vis international experts has been changing. With the importance given to self-reliance and the earlier dependence on well-qualified national experts, more attention is being paid by beneficiary governments to the effectiveness of training counterpart staff, and in particular those factors which concern training abroad.

3. This paper covers a number of important questions:

Chapter 1 looks at the way in which the ILO fellowship programme has evolved in recent years and examines the chief features such as the increase in regional fellowship training, which has attained some prominence.

Chapter 2 attempts to show the way in which fellowship training projects are prepared and those important improvements which may lead to improved programme quality.

Chapter 3 highlights the importance of overseas training as a major component in fellowship programming and indicates the need to relate this action more closely to follow-up implementation.

Chapter 4 considers the cost of fellowship training and the main approaches to ensuring cost-effective fellowship action.

A final section reviews the lessons learned and draws conclusions.

A number of tables and appendices are included to substantiate the analyses given in the text.

4. This report is based on the experience gained in the ILO and Turin Centre during the past 20 years. Additional information was gathered from a number of sources, including:

- responses to questionnaires sent to ILO Offices;
- discussions with officials of UN agencies other than the ILO and analyses of official reports;
- discussions with officials in host-country administrations and placement agencies;
- interviews with fellowship holders attending individual placement programmes or in-group training;
- interviews with trainees in bilateral training schemes.

5. This paper is not intended to be exhaustive. In particular, it does not attempt to give a comprehensive evaluation of the overall impact of fellowship training on technical co-operation projects. However, the assessments made show the degree of assistance contributed by fellowship training to the global technical co-operation inputs provided by the ILO.

I. EVOLUTION, CHARACTERISTICS AND MAJOR TRENDS OF THE ILO FELLOWSHIP PROGRAMME

Definition of fellowship

6. Fellowship training has been defined as "training which is undertaken by an individual who is the recipient of a monetary grant from an organisation for this purpose. The grant is made to a qualified individual to enable him (or her) to follow a planned programme in institutions or establishments in foreign countries (or exceptionally in his own country) for a specified period. Fellowship training permits the individual to acquire disciplines and skills which, on his return, will be conducive to the economic and social development of his country and for which adequate and sufficient facilities do not exist at home.[1]

Fellowship training within the UN system

7. In both 1981 and 1982, the ILO administered about 2,000 fellowships (see Appendix I). Comparing the ILO Fellowship Programme with that of other agencies of the United Nations system, statistics show that the ILO's have amounted to about 7 per cent of total fellowships in 1981. Whilst it may not be possible to give a precise indication of the number of fellowships executed by these agencies over time the proportional allocations tend to remain the same.

---

[1] Precis of a United Nations Joint Inspection Unit Definition; Report A 31/101/76 11251.

Table 1

UN Organisations	Relative proportion of fellowships implemented annually by each organisation
WHO	33
UNESCO	10
FAO	8
UN	14
ILO	7
IAEA	7
UNIDO	6
WMO	2
ITU	7
Others	6
	100

8. Recent indications from technical co-operation agencies show that beneficiary governments are becoming increasingly convinced of the need to implement projects with more attention on increasing the number of national experts and counterparts within them. From these pointers it would appear that demands for the fellowship training of national staff will grow over the next ten years.

9. ILO fellowship programmes are designed to expose fellowship holders to a wide range of experiences chosen to match technical co-operation project needs. The ILO can accommodate the language requirements of nominees by choosing the most suitable placement arrangements either in Turin where training is provided in the working language of the fellowship or in the most appropriate countries. The international and tripartite dimensions of the ILO's infrastructure permits fellowship holders not only to be exposed to comparative studies in a range of countries, but also to hear and observe the actions of all the social partners involved in the development process. Through post-training support from the

Turin Centre and the ILO regional advisers, and more particularly with information and documentation support from regional projects, such as CINTERFOR, CIADFOR and APSDEP, fellowship programmes can be made much more project relevant, nationally profitable and more widely involved in technical co-operation amongst developing countries (TCDC).

Structure of the ILO fellowship programme

10. Since the mid-1970s, new trends in technical co-operation have become apparent, the emphasis has moved away from expert assistance toward greater fellowship and equipment inputs in project design.

11. At present, technical co-operation projects in which the ILO is involved can be classed under five main headings, each of which involves fellowship programmes in varying degrees:

(a) Policy-oriented projects;

(b) Investigative field work projects;

(c) Institution building projects;

(d) Investment-related projects;

(e) Inter-country projects.[1]

Within these classifications, four main types of fellowship programme can be defined:

(a) fellowships related to multi-component technical co-operation projects, aimed mainly at broadening the training aspects and practical experiences of national counterpart personnel;

(b) fellowship projects set up for specific purposes, such as providing training to keep up to date with new technologies or administrative functions at national level: such projects may include a single fellowship or a group of fellowships;

(c) high-level study tours to enable fellowship holders to make detailed comparisons between administrations, methods, procedures, national practices, etc.: their duration is usually very short (averaging one month);

(d) specific action fellowships, usually in the form of a grant, to attend a regional or international seminar or workshop of short duration.

---

[1] GB 221/OP/1/1.

Based on the working experience of the Turin Centre, the relative size of these four categories is shown below.

Table 2

Type of fellowships	Percentage of total fellowships awarded		
	Less than 30%	About 30%	More than 30%
(a) Multi-component project	-	32	-
(b) Fellowship project	-	-	47
(c) Study tours	16	-	-
(d) Others	5	-	-

12. Since June 1978, all ILO fellowships with the exception of the fellowships awarded by the Bureau for Employers' Activities have been administered by the Turin Centre. The Centre received a total of 1,874 applications in 1980, 2,019 in 1981 and 2,329 in 1982 and was able to draw up study plans for 1,556, 1,869 and 1,980 fellows in these three years respectively.

13. Taking into account all the fellowships administered by the Turin Centre in 1982, these can be classified as follows (total number of fellowships, 1,980):

Table 3

by type of programme	
Group with inclusive study tour	38%
Group with individual placements	1%
Individual placement only	24%
Short workshops, seminars, etc (less than one month)	36%
Intern attachments to Turin	1%
	100%

The trend in this classification is the notable increase in recent years in seminars and short-duration workshops. These activities mainly involve high-level experts and the exchange of information and experiences.

Table 4

by source of funds	
ILO regular budget	8%
UNDP	20%
Bilateral)	
Multilateral)	45%
World Bank, etc.)	
Others	27%
	100%

Multi-component project fellowships are mainly financed from UNDP funds. When considering all ILO administered fellowships, the funds received from this source have not substantially increased.

Table 5

by geographical area

Africa	46%
Americas	10%
Asia/Pacific	18%
Europe	20%
Middle East	6%
	100%

A large number of fellows from Africa have been sent for overseas training under the ILO's auspices. Four different working languages have been used: Arabic, Portuguese, French and English. Many of these fellows participated in programmes at the Turin Centre which included either extensive study tours or practical learning placements in a range of host countries.

Table 6

by sector of activity

Trade union training	3%
Management training	15%
Educational technology	12%
Industrial training	5%
Agricultural training	3%
Working conditions, etc.	2%
Seminars (various)	36%
External placement (various)	24%
	100%

The low figure for industrial training shows the growing emphasis placed on intensive local training activity rather than overseas training. The figure for instructors and training officers engaged as industrial trainers is included in the Educational technology total.

General characteristics of the ILO Fellowship Programme

14. The ILO Fellowship Programme is related to producing national self-reliance in specific sectors or for defined activities through short duration intensive training periods. This training tends to be offered to middle-level qualified managers, technicians or administrators, rather than to high-level qualified persons devoted to obtaining higher degrees or to craftsmen or operators who are in need of longer term basic training. Fellowship holders requiring higher degrees are better catered for by bilateral or private arrangements with host-country seats of learning, while basic training is better provided locally or within the region.

15. Training abroad is requested for fellowship holders in ILO technical assistance projects when:

- the knowledge and skills required do not exist locally;
- project allocations permit comparative regional or inter-regional placements to be made so as to give an improved learning benefit to the fellowship holder in line with project objectives. This approach has to be utilised where high-level nominees who have been selected for fellowship programmes can have a positive influence for change after completion of their programme.

16. Present trends are to expose ILO trainees increasingly to experience in more than one country so as to gain international experience, as compared with what is usually received from training requested from organisations or enterprises funded under bilateral programmes. Also, it has been noted from interviews with fellowship holders attending group training at the Turin Centre that, when two equivalent candidates apply for a single post, or for career promotion in their national situation, usually the candidate trained in a developed country is preferred (all other factors being equal). Thus, counterparts nominated for fellowship training prefer the developed world as the location for implementing their fellowship, often in more than one country.

17. Government authorities in beneficiary countries have been giving much more attention to those key individuals who are proposed for study in the developed countries. However, many technological or socio-cultural patterns common to the developed world are not necessarily those which can be easily adapted in the developing world. For these reasons, governments, assisted by chief technical advisers, in co-operation with the ILO Regional Departments, and with the Turin Centre, often recommend:

(a) a wider geographical distribution of fellowship programme placements in host countries of the developed world;

(b) utilisation of institutions or enterprises in the developing world, where fellowship learning is more compatible with conditions in the fellowship holder's national project.

Regional fellowship training

18. Where beneficiary governments are convinced of the advantages, they request fellowship training within the region. This helps training institutions and enterprises in the developing world to promote regional, rather than purely national orientations. A benefit may be obtained from training in developing countries which is different from, or in addition to, that obtained in developed countries. Perhaps a much closer study needs to be made of those appropriate institutions or enterprises, existing "nearer to source", which can meet training needs of ILO technical co-operation projects within the same regions. An important factor in this consideration is whether a regional institution can provide relevant cost-effective training that meets the requirements of fellowship programmes to the same, or improved, standards than those that can be obtained outside the region.

19. In the last two decades, the ILO has helped in developing many training institutions, productivity centres and regional organisations. These products of the ILO's technical co-operation assistance are being utilised more for regional fellowship training, as travel, placement fees and living expenses are often (but not always) lower than in the developed world. By efficient planning, beneficiary governments may obtain more fellowship programme components by using this approach without increasing project budgets, always provided that quality is maintained. International study tours to the developed countries are often moderated by designing training programmes which include placements in learning institutions in other regions. As an example, an itinerary may include, for an African fellowship holder, a substantial placement in the United States with shorter placements on the outward and return journey in Egypt and India or Japan and Malaysia. This approach increases the effectiveness of the training without largely increasing the fellowship cost.

20. The ILO has also developed arrangements for training in the regions. In Asia and the Pacific and in Latin America, as part of technical co-operation amongst developing countries (TCDC), training placements have been made within the respective region, but no regular pattern of increase or decrease in these arrangements can be noted.

Management of the fellowship programme in ILO

21. Before 1973, an Individual Fellowship Administration service existed at ILO headquarters. Training courses, mainly for large groups, were being provided at the Turin Centre, and included monitored study tours. Little attention was given at that time to individualised learning at the Turin Centre.

22. In 1973, there were good reasons for transferring the administration of vocational and management training fellowships from ILO headquarters to the Turin Centre. Professional trainers were available in Turin, who could improve the effectiveness of fellowship training by -

- acting as an advisory source on training matters for managers in field projects;
- answering training queries addressed by host-country agencies on matters concerning international training;
- developing improved fellowship monitoring and reporting systems;
- instituting follow-up procedures;
- providing training courses at the Turin Centre for a part of the fellowship component where appropriate expertise was in line with project objectives;
- inserting into fellowship programmes an ILO tripartite approach where appropriate;
- co-ordinating separate fellowship training action in several host countries (mainly Europe) by using the well-established Turin Centre network, which covered group study visits.

However, from 1978, more individual fellows were integrated into group training programmes but, due to the vast range of specialisation then represented in fellowship training requests, the practice of submitting dossiers to faculty for consideration was abandoned. By 1980, group training in Turin had become much more individualised and methodologies for separate learning well developed.

23. A positive consequence of transferring fellowship administration to Turin was the setting up of the Fellowship Management Service. This brought about significant changes in the ILO's approach to fellowship training, the most important of which was the closing of the gap between specific project training for larger groups with multi-component project training for individual fellowship holders. Today, these are no longer considered separate activities and for this reason they are commented upon jointly in this review. By daily contact with fellowship project trainers and training programmes, the remoteness of individual fellowship training as a separate operation has been removed. Although fellowship training implementation and the management of fellowships at the Turin Centre have improved significantly, there is still room for further improvement in the design of training plans and the monitoring and follow-up of training in the field.

24. In 1982, the Turin Centre installed a mini-computer as part of its policy to improve quality and keep up to date. A computerised Fellowship Management System has been fully operational since January 1983 and is concerned with recording data and information on the progress of fellowship holders. Statistical detail is now readily at hand and trends in fellowship training activities can easily be identified, along with cost factors, evaluation results and proportional relationships between host-country placements, regional and local actions.

Fellowship management procedures

25. When considering the general problems of implementation of fellowship programmes, and referring to table 2 in paragraph 11, it can be seen that most fellowship holders, when travelling overseas for training, can easily move out of the control span of their project and of their local or regional ILO offices. With centralised management of fellowship organisation and implementation procedures, recurrent problems are identified, isolated and corrected. Central management is justified by its service to the fellowship holders and helps avoid substantial delays and other problems which may result in dissatisfaction for the individuals affected. Host-country authorities do not prefer, and in many cases do not accept, direct dealings with individuals in projects who require enterprise or institutional placements, which is mainly the case for ILO fellowship holders. This would involve direct contacts between the managers of 500 individual fellowship holders and more than 2,500 organisations in about 30 countries in each year. Project managements often request the Turin Centre to arrange fellowship implementation on their behalf.

Decentralisation of fellowship activities

26. Decentralised training involves the presence of efficient organisational structures and arrangements in operation in the regions. In order that there may be a standard fellowship policy for the whole of the ILO, irrespective of where activities are conducted, rules, regulations, common norms, support methods and procedures have been developed by the Turin Centre and are applied to the projects being administered by the regional offices as well as the Centre. Although administrative arrangements, procedures and standards are prepared by the Turin Centre, many fellowship operations are carried out within a decentralised framework. In respect of the decentralisation of fellowship actions, in April 1978 a joint ILO/UNDP task force on "Procedures and Practices affecting Project Implementation" came out strongly in favour of decentralising maximum authority to chief technical advisers. This delegation of authority, with respect to fellowship components of technical assistance concerns the authority -

(a) to select fellows;

(b) to propose a tentative study programme and indicate suitable types of host institutions;

(c) to handle the evaluation of fellows by requiring monitoring reports, progress reports and final reports to be submitted on schedule.

Relations between the Turin Centre and ILO regional offices and regional projects

27. The Turin Centre's fellowship activities are closely related to regional and national field projects. The ILO concentrates on training provided in the region or country of the participants, with the Turin Centre's technical services being used when training of the required quality or type is not available on the spot. The Turin Centre's fellowship activities are programmed in concert with those of the ILO Regional and Local Offices, Regional Projects (mainly the Inter-American Vocational Training Research and Documentation Centre (CINTERFOR), the African Centre for the Development of Vocational Training (CIADFOR) and the Asian and Pacific Skill Development Programme (APSDEP)) and leading national training institutes. In November 1980, the ILO Governing Body considered a report on the Turin Centre concerning a survey of training needs carried out in Africa, the Americas, Asia and the Middle East.[1]

28. The survey took into account the varying conditions of each region. Responsibility for carrying it out was given to the ILO's regional offices, which drew on the services of the regional advisers in vocational training as well as regional institutions with which the ILO is associated, e.g. CINTERFOR, CIADFOR, and APSDEP. In addition, the services of individual consultants were used in order to take in a greater number of countries. The survey covered 35 member States, with the objective of obtaining the opinion of the ministries responsible for national training policy and of employers' and workers' representatives. The views of more than 100 public institutions and non-governmental organisations concerned with training activities were also obtained.

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1 GB.214/PFA/5/4.

29. The survey found that in Africa the work of the Turin Centre (particularly as regards fellowship programming) should be an integrated part of the ILO's overall programme of technical assistance in that region. Proper co-ordination must exist between means of action at headquarters, in the regions, at CIADFOR, at the Turin Centre and the facilities available at national level.

30. In the Americas, the survey was substantially aided by the ILO Regional Office in Lima, CINTERFOR in Montevideo and the network of ILO offices. The unanimous view seemed to be that the Turin Centre's assistance is useful and timely, and that it meets requirements that cannot be fulfilled by the countries themselves or within the region. The services of the Turin Centre were considered particularly valuable in providing fellowship programmes of further and continuous training for already experienced training staff. Access to training models developed in industrial countries was considered an important function in this context.

31. In Asia, an active policy of seeking training outside the continent with the assistance of the Turin Centre was considered an important means of speeding up progress towards Asian self-sufficiency. Most of the institutions surveyed hoped for a greater effort on the part of the Turin Centre to help their countries develop techniques for identifying training needs at the local level and methods for assessing the validity of their training schemes. Such activities are carried out in close co-operation with the ILO Regional Office in Bangkok, with APSDEP and with national bodies.

32. In the Middle East the need to produce trained personnel is acute. The countries concerned rely on the Turin Centre to assist them in setting up new fellowship training programmes for advanced technical expertise in occupational areas where training facilities either do not yet exist or cannot meet current requirements. Such training should be aimed essentially at fellowship training participants so as to enable Middle Eastern countries to meet practically all of their training needs within the next few years.

33. The survey showed that the Turin Centre's services are integrated at regional level and fully in co-ordination with the main Regional Projects. The Directors and CTAs of CINTERFOR, CIADFOR and APSDEP are invited as observers to the annual meeting of the Programme Advisory Committee, which reports to the Board of the Centre.

II. PREPARATION OF FELLOWSHIP PROGRAMMES

Identifying training needs

34. The figures in table 2 indicate that the number of nominees recommended for fellowship training from multi-component technical assistance projects is less than that recommended from fellowship projects. When preparing the draft of a technical assistance project, governments often adjust fellowship components in terms of numbers and durations, so as to round up the financial totals of the other project components to an acceptable figure. At a later stage in the life of a project, the fellowship component being least clearly defined is the most vulnerable to being cut or changed.

35. Although these statistics reflect the trend that training will continue to be requested for national staff and counterparts attached to multi-component projects, it does not confirm that the number of requests for direct training fellowship projects always satisfy national needs. It is likely that a need for more direct training exists, but in many cases it is not clearly identified at the national level. One explanation for this may be that chief technical advisers and international experts appointed to multi-component projects have a good knowledge of training principles and practices whilst the types of consultant engaged in studies of national or sectoral development may not be as well aware of available international training opportunities. In this respect, some criticism was made of the Turin Centre to the effect that it has not publicised sufficiently the important resources available for meeting the needs of direct training projects. Thus, direct training projects, which could help national experts gain more expertise so that they in turn could assess the new development needs, remain unidentified.

36. UNDP representatives and ILO chief technical advisers, although having some knowledge of training and associated practices, may not in themselves be training "experts". Thus, they often find difficulty in developing or assessing training schemes for project staff requested by a beneficiary government. A number of Directors of Branch Offices and some Regional Advisers have indicated that the ILO Manual for Chief Technical Advisers should be extended to contain sample training plans both for in-service training within the project and for the implementation abroad of technical co-operation fellowships. These descriptive plans should include training programme design instructions, indicate learning criteria and quality norms, and provide information sources for advice on curriculum development. Also to be included is relevant advice on the needs of host-country institutions who accept fellows for training periods and also methods for relating fellowship studies to follow-up activities.

Objective training of national staff

37. The basic unit of a technical co-operation programme is a project. This term is used to refer to any organised government effort, whether this is a set of complex activities or the training abroad of a single individual undertaken as a self-contained effort to meet a determined goal or objective. So as to achieve its immediate objective, even though this is only part of a broader national development objective, a project has to produce certain designated outputs.

38. In order to achieve these outputs, it must be provided with inputs, one of which is supplied by the beneficiary government in the form of national personnel. By the time that international inputs to a project cease, the national project staff should be able to carry on unaided. To achieve this end, governments attempt to nominate nationals who have the basic qualifications and experience to develop into fully competent experts by being trained both locally using international project staff and then by fellowship training abroad. To define objectives for the type of training needed in line with project goals, and to be able to decide whether this should be implemented locally or abroad, it is necessary to make two separate analyses. Firstly, an analysis of the output requirement from each project post, so that when combined with the expected output from other project posts, the necessary actions to reach described goals can be obtained. Secondly, an analysis of the aptitudes and capabilities of each national expert, counterpart or member of the support staff working in the technical assistance project.

39. Post specification requirements based on these analyses and compared with the knowledge and experience characteristics of existing staff will reveal:

- the total number of staff members requiring training;
- the number of staff members who can benefit from in-service training locally;
- the number of staff members who need additional training overseas;
- criteria for designing group and individual training programmes to fill the identified gaps in the knowledge and skills of project personnel.

This information can be further refined so that for each of the national staff appointed to occupy key posts in the project, profiles will have geen developed to indicate:

- academic level before training;
- work experience before training;
- training to be undertaken to eliminate gaps in knowledge or professional skills consequent upon project objectives;
- competence, aptitude and performance improvement required to support self-reliance.

"Sandwich" training for project staff

40. An important and successful development in the implementation of fellowship projects by the Turin Centre has been that which concerns "composite" or "sandwich" training. Previously, up to about 1978-79, groups of fellowship holders attended courses at the Turin Centre, where the main learning exposure took place. At present, this "isolated" study approach is progressively changing to one in which the first training action takes place in the country, or region of origin of the trainees. In this first stage, expressed training and learning needs are examined, analysed, adapted and developed into learning plans. Secondly, the fellowship holder travels and studies outside the region for a sufficient period of time to implement the learning plan. Finally, a workshop or follow-up seminar is held in the region of origin to construct action plans for implementation or innovation. Thus, a larger proportion of time is involved in the effective local training of national experts and counterparts.

41. A similar innovation could be expected to improve the effectiveness of key personnel appointed to multi-component technical assistance porjects who are nominated for fellowship programmes. In other words, fellowship programmes should not be organised so that the "isolated study period" undertaken away from the project is the only training action implemented. Up to the present, in most projects, this has tended to be the rule.

42. Future fellowship programming should therefore introduce, wherever possible, the "sandwich" concept along the following lines.

Table 7: The "sandwich" or composite training concept

Local Training	Needs identification Target population Support personnel National staff Nominated fellowship holders Animators National Project Leader ILO CTA with international experts and Turin Consultants	
Overseas Training	Development of learning Target population ILO administered fellowship nominees Animators Turin Centre National and international experts in host-country institutions and enterprises	
Local Training	Follow-up implementation Target population Fellowship holders National staff Animators Turin professors ILO Experts and Consultants	Training of support personnel by national staff

Preliminary trials have shown that, by adopting the phased pattern indicated above, increased expertise is gained in training periods of equivalent duration. The single area which can be chosen for immediate improvement is that section of the training plan which gives, to all partners concerned, much more objective and detailed information on what fellowship training must achieve; what kind of follow-up action must take place; and the commitment made by the national authority to ensure that the fellowship holder is retained within the project so as to utilise new knowledge and skills purposefully.

Grouping fellowships for training

43. Although individual placement in industrial and commercial schools, vocational training centres and enterprises has been a major device to gain experience of managerial, technical and training expertise and practical skills, this has not proved to be fully effective in all fellowship programmes. Where sufficient numbers of fellowship holders having the same training objectives are available from a number of ILO technical assistance projects, then overseas group training can be arranged at the Turin Centre. As this option will depend on the availability of fellowship holders, it can be written into training plans as a preference to be implemented if feasible. In this type of arrangement, fellowship holders can benefit from being involved in learning methodologies which promote interactive participation between trainees. Where a total programme of this type is not possible because of insufficiency in fellowship holders having similar technical content objectives, they can be grouped together either in Turin or in appropriate regional locations and achieve a more effective result by following phase I before and phase III after their individual attachments have taken place in other host countries.

Preparation for overseas training

44. An assessment made of the various phases of fellowship programmes has shown that the design of the overseas training component is the most critical. Unfortunately, in more than 70 per cent of the ILO's multi-component fellowship programmes, there seems to be scope for further improvements in the design of the overseas component of the training plan. Fellowship holders should be involved in the design and preparation of their overseas training programme. Full information has to be given in the project office, in the natonal office which has requested the fellowship and in the local ILO or UNDP office before the fellowship holder embarks on the overseas training component of his training. More than 65 per cent of ILO fellowship holders have not travelled outside their own countries previous to being nominated for training abroad. From interviewing fellowship holders who had undertaken training programmes in the biennium 1980-1982, it was evident that at least 30 per cent of those travelling abroad for fellowship studies were either not briefed or at least minimally advised on the programme that they were to follow, or on the way of life in the countries they were to visit, before they left their countries of origin.

45. The explanation for this is relatively simple: with group training the course programme has been established and most likely publicised some time in advance. Thus, information on the type of candidate, education and experience needed, course content and level, objectives and goals, are available from the organisation implementing the training. On the other hand, for an individual placement or high-level study tour, the definitive technical briefing can only be given in the host country. Some project managements have not been happy when they have given a technical pre-briefing based on insufficient information from the host-country representatives which has, at a later time, proved different to the actual implementation pattern.

46. One major administrative difficulty is that the Turin Centre, and through it host countries, are very often asked by beneficiary governments to prepare overseas training programmes with insufficient time available to make the complex arrangements required. On analysis, the reason for late requests is often that the whole process of finding chief technical advisers, international experts, national experts and support staff creates delays with respect to original project work plans which have definite commencement and termination dates. As the date of a review of project activities approaches, many governments attempt to nominate candidates hastily for fellowship training so as to stay within their action plan. In spite of the Turin Centre's and the host countries' relatively successful record, it is evident that really effective overseas training can hardly be implemented if insufficient time is available for its administration.

47. Project management should be aware that many host countries also have to place a larger number of bilateral fellowship holders in industry and commerce, (which are nowadays often in recession). These countries have a smaller capacity and willingness than they had five years ago. This lower availability of training facilities in Europe and North America is not likely to improve in the short term. Many host countries are unable to accept requests for training placements with less than 12 to 16 weeks' lead time. Statistics show that the minimum time to make administrative arrangements which ensure a training programme's relevance to defined needs in line with project objectives, the capabilities of the fellowship holders, and the availability of suitable host country facilities, is eight weeks. The average time needed for longer programmes involving complex placements in several countries is 16 weeks.

Local briefing

48. When fellowship candidates have been notified that they are accepted, candidates are first briefed in the project or by their direct supervisor.

49. One of the instructions received by nominees requires them to report to the local ILO or UNDP office, in the case of international fellowships, or to the embassy or other representatives of the donor government in the case of bilateral funding. In this briefing locally by the executing agency, or donor organisation representatives, little technical information is given; more attention is given to administrative arrangements concerning the fellowship.

50. Some countries have well established ILO Turin Alumni Associations which maintain links with national experts who have previously followed fellowship training administered by the Turin Centre. One of the functions recognised by these associations is to brief newly appointed national counterparts on what to expect from overseas training, particularly in relation to programmes arranged at, or by, the Turin Centre. Briefings given by members of Alumni Associations, at the request of the local ILO office or the project CTA, have proved extremely useful. Briefing in the beneficiary country, before a fellow sets out on a study trip, should very clearly define the expectations of the government and the project involved. At this stage, the fellow's personal objectives can be considered and allowed for, if appropriate.

51. For fellowship holders travelling to join in-group training at the Turin Centre or to other forms of ILO Turin courses or seminars, experience shows that more than 90 per cent of nominees have been briefed on all the above items either in project or in the local office of the executing agency. For multi-component project staff proceeding to individual fellowship placement or national staff undertaking high-level study tours, more than 90 per cent are well aware of travel and administrative procedures, but no more than 60 per cent have been well briefed on training objectives and goals.

Nomination of fellowship trainees

52. Once the beneficiary government has prepared a training plan with indications of suitable host countries, completed nomination forms for each fellowship candidate are sent, after approval by the benficiary government, to either Lima or Bangkok Regional Offices when regional implementation of training is intended; but, where training is to be provided outside the region in which the project is to be executed, the local ILO or UNDP Office in the beneficiary country sends the appropriate nomination forms and indicative training plans to the Turin Centre. The Turin Centre then contacts ILO or UNDP offices, or correspondents (National Placement Agencies), in each of the host countries in which implementation has been requested in the training plan. The Turin Centre assumes that the training plans received are fully related to project objectives and requests host-country representatives to adhere, as closely as possible, to these plans. Host countries, for a variety of reasons, which vary according to changes within their economies, cannot always meet the needs of the fellowship plan at the time of implementation, but usually at that late stage it is difficult for the Centre to change the country and "best compromise" solutions are worked out between the partners.

Selection of candidates

53. The selection and implementation criteria considered by national project managements and CTAs when completing fellowship nomination forms for submission to the executing agency by the beneficiary governments, must include consideration for at least the following points:

- language factors which affect learning in host countries;
- political and/or cultural factors in selected host countries vis-à-vis the beneficiary country;
- complementarity of available learning schemes with the previous knowledge and experience of fellowship holders and also their relevance to project objectives;
- progress monitoring: type and frequency;
- progress reporting: type, frequency and source, i.e. fellowship holders, host institution, on executing agency.

54. Some officials of beneficiary governments and also some project managers are affected by the "reward syndrome". With the difficulty of attracting suitable local staff for project support, fellowship travel to the developed world is offered as an inducement. The offer of a fellowship may be made to national individuals as a reward for previous services rendered or future actions expected, or as an allegiance to the national official making the offer. Inducement may be necessary because of the low salary rate paid to national experts; unfortunately,

the inducement no longer exists after the foreign travel is completed; often, the national expert does not remain long in the project, but accepts more attractive offers from industry based on the fact that he can "sell" his services better after some "overseas" experience.

Choosing a host country

55. Some project managers insist, rather than merely indicate, that certain fellowship holders must be placed in specific enterprises in defined localities. Host countries are embarrassed when, for a variety of reasons, the requirement cannot be met; and for this reason they prefer a range of alternative proposals. Where ILO fellowships are implemented inter-regionally, experience shows that training is widely requested in French- or English-speaking countries in the northern hemisphere.

56. Project managements may not have adequate means for choosing host countries having relevant training facilities. Often there is a tendency to send a fellowship holder to the country and location from which his international counterpart originated. However, more effective training can often be obtained in a different location without sacrificing programme quality, but this is rarely suggested because the circumstances and availability of good training prospects in foreign locations are not sufficiently known to the CTA, and technical advice from a regional adviser or from the Turin Centre is not readily accepted by him.

57. At present, there is no formal information bank within the ILO system which records globally those host-country institutions which have consistently and successfully provided training for fellowship holders from projects executed by the ILO. Although the effort required for the compilation and continuous updating of a fellowship placement database would be considerable, as the information within it would date rapidly, it may be necessary for the Turin Centre, in co-operation with ILO offices in the main host countries, to undertake this work if the expected expansion in fellowship training materialises. This data would assist beneficiary governments and project managements with information for the design phase of fellowship components for those projects under their responsibility. Expanding this data to also include those ILO-supported institutions in the developing world who are willing to accept fellowship holders for training, would encourage more regional placements in the future.

The role of ILO offices in host countries

58. The following responsibilities are assumed by the ILO offices in host countries:

- identification of appropriate training locations in conformity with the training plan developed in the project; and identification of suitable visits to be made to relevant high-level institutions, authorities or advanced developments in conformity with study tour requirements;
- assistance to fellowship holders whilst in host countries, including internal travel, accommodation and administrative arrangements made in conjunction with central administrative authorities.

The service provided by ILO offices in host countries, often under difficult circumstances, has been excellent and, without their continued help, the acceptance of fellowship holders by host countries would not be so effectively accomplished.

59. Local offices operate differently from each other according to the national arrangements for international training specific to the country in which they are located. It is not possible to set out a standard procedure for host-country implementation of fellowships, except in so far as concerns the information required by these offices to enable them to make training arrangements quickly and effectively. A major problem for the local offices is that, often due to insufficiency of information received from field projects or beneficiary governments, an excessive amount of communication has to be entered into with Turin, with the consequent increased cost factor and inevitable delays, in spite of an extensive use of the telex system. To reduce these delays the Turin Centre often has to make alternative placements on behalf of the projects which are then notified for agreement.

Rate of implementation of fellowships

60. There is a constant concern to improve the implementation rate of fellowship training components in technical co-operation projects. One of the major problems of implementation is the slow rate at which beneficiary governments present nominations for fellowship programmes. An analysis of Turin Centre records show that amongst the factors which hinder the rate of implementation are:

- decision to cancel or postpone fellowship implementation through lack of counterpart staff;

- decision to divert project funds from fellowship execution to other components during the financial management of the project;

- insufficient attention to detailed completion of nomination forms;

- insufficient attention to clearing and transferring fellowship funds;

- systematic completion of theoretical training guidelines and implementation plans, but with insufficient technical or substantive detail for acceptance by the host-country authority.

Turin Centre statistics also show that about 9 per cent of available fellowships are cancelled whilst not less than 30 per cent are seriously affected by postponement or delays. Cancellations and postponements severely strain both the administrative mechanism and the relationships between ILO offices and host countries in which fellows were expected to be placed. This arises because often beneficiary governments cannot find sufficiently qualified persons who can be appointed to technical assistance projects. Not enough counterparts or project support staff are provided, and thus candidates for fellowship programmes already appointed to a project are not always available.

III. OVERSEAS TRAINING

Overseas training principles

61. In the early 1970s, to ensure that all individual fellowship holders were adequately briefed and that culture shock and similar demotivators were reduced to a minimum, travel to Turin was foreseen in the first phase of the training programme. The fellowship holders took part in a series of events at the Turin Centre for about one week, during which time they could be tutored by

the Faculty. Recently, from 1978 onwards, this tendency for individual fellowship holders to "stop over" in Turin has drastically reduced and can be attributed to the fact that most successful candidates selected for individual fellowships were requested to leave their countries for overseas training as quickly as possible (often occasioned by project delays). Thus, spending an additional week in Turin was not convenient, particularly if their specialisation was outside the technical competence of the Turin Centre.

62. Few problems arise in the implementation of overseas training, provided the following conditions are met:

- fellowship holders are at an appropriate stage of their career to benefit from the training and are motivated to learn;

- the content of the training prepared by overseas enterprises or institutions is both interesting to the trainees and relevant to their prescribed objectives;

- fellowship holders' work-related experiences before training allow them to search for solutions during their training period to the problems they are most likely to face on their return home;

- the fellowship holder's direct chief encourages him or her to take full advantage of the training opportunity presented.

Briefing in host countries

63. Host-country representatives prefer to give the technical briefing after the individual fellows arrive. This is because the local office does not wish to give out training implementation programmes, which for reasons beyond their control, are often changed at the last moment. On arrival, the fellowship holders are given full information on their training location, stipend and accommodation arrangements. Internal transport tickets are provided where appropriate and some information given on the habits and customs followed in that country. Regular communications and recent return visits, between Turin Centre officials and those whose work in ILO local offices is concerned with implementing overseas training, have shown that local office briefing is extremely effective.

64. Fellowship holders receive a detailed technical briefing on their first appointment in each of the enterprises or institutions to which they are allocated. In most developed countries, as part of internal evaluation procedures, fellows are regularly required to undertake certain preliminary evaluation exercises, so as to assess their level of entry to practical training and job-related studies. Although this is a normal procedure, and a basis from which the fellows' progress can be regularly monitored, many fellows object to being tested. As they see it they should be accepted as being competent and not subjected to proving their capabilities.

Monitoring training

65. The effective monitoring of the progress of fellowship training has been a problem in the past. The Turin Centre is now thinking of initiating measures that would make possible -

- continuous monitoring of fellowship training;

- a continuous record of fellowship actions.

<u>Continuous monitoring</u> would replace the present informal patterns of supervision and would be formalised. This could be brought about in one of several ways, for example:

- either an international expert (other than the chief technical adviser) is nominated fellowship tutor and monitors all aspects of the fellow's progress, from start to finish of the scheme. This international expert could be part of the project team or connected with it in the local or regional ILO office; or

- the Turin Centre Fellowship Management Service or a technical department of headquarters nominates a tutor from its rota of experts; or

- an ILO local office official in the host country accepting the fellowship holder could be nominated, because a major part of the fellowship is being undertaken there.

<u>Continuous recording</u> would involve the keeping of a history record or a peripatetic log book.[1] The log book would not only deal with the activities arising after appointment of the fellowship holder, but would be introduced at the early stages of preparing fellowship objectives, training plans, trainee selection criteria, etc. At this preliminary stage the fellowship "tutor" may be either a national expert on behalf of the beneficiary government or the ILO's chief technical adviser of the technical assistance project. Preparation training carried out in project, or locally, would be recorded in the "log" with supervision and monitoring comments; the tutor of this training becomes the second fellowship "tutor". In this way, the fellowship would progress under the guidance of a series of tutors who would form the body corporate of the "continuous tutor concept" by whom both progress of the fellowship and the trainee would be recorded.

<u>Flexibility in implementation of overseas training</u>

66. Although beneficiary governments have the major authority in deciding on fellowship training needs, when ILO offices, situated in host countries, contact local training authorities so as to make definitive placement, or study tour arrangements, they need to be reasonably flexible in their demands:

- <u>duration of training</u>

  beginning and ending dates are fixed in each host country. Limited flexibility for change exists as the programmed dates for training in each country will have been confirmed well in advance of the implementation of the programme;

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[1] The log book contains a regularly maintained diary of events and, as such, provides an opportunity for self-monitoring.

- time to be spent in each enterprise

  within each country maximum flexibility or interchangeability is necessary to meet defined training needs more adequately. It sometimes occurs that, after a preliminary evaluation of a trainee's potential for training within an enterprise, this possibility to change the programme at short notice has to be utilised;

- training programme content

  similarly, content levels or subject fields have to be changed after the pre-evaluation results are known. Fellowship holders should not be constrained to follow an unsuitable training programme for reasons of inflexibility of the administrative system;

- training programme learning methods

  beneficiary governments often require industrial placement or work exposure at site operations. For various reasons relating to either industrial legislation or industrial relations practices, the direct job involvement of overseas trainees may not be possible. A flexible approach to accepting different methodologies which provide the same experience away from the worksite may have to be accepted by fellowship holders and their managers;

- language requirements

  ability to read, write and communicate in the language of each host-country representative, or enterprise tutor, is essential. It is not possible for host-country administrations to provide "one to one" interpretation services as this is cost-prohibitive and the effectiveness much lower than direct communication methods. Similarly, host-country enterprises are extremely inflexible in accepting into industrial environments trainees who cannot respond to written or verbal safety commands.

Technical debriefing after overseas training

67. It appears clear from analyses made on a large number of recent programmes that technical debriefing is not sufficiently insisted upon. As the termination date of the training programme approached, fellows became so absorbed in the administrative detail of their return journey to their homes that all technical reporting considerations were forgotten. This situation can be remedied by requiring all fellowship holders to be involved in a debriefing work project which has to be completed in the last two weeks of their study period. This system is in operation at the Centre and this has reduced the lack of technical attention in the final phases of overseas study. By involving the third phase of the Turin Centre's "Optional three-phase plan for individual fellowship programmes" a similar alteration could be made by beneficiary government officers when preparing or approving fellowship training plans.

68. On the whole, information on technical debriefing in projects, obtained from answers to questionnaires sent by the Turin Centre in 1982 referring to fellowship training, showed that about 50 per cent of the fellows were effectively debriefed, and they also presented an acceptable and useful report at the end of overseas training.

Evaluation of training programmes

69. Evaluation is dependent on the precision with which training objectives and project goals are defined in the programme design stage. As these definitions should also be significant in their effect on the quality of fellowship holders selected for training, there is also a correlation between evaluation and the quality of trainees who have been, or who are, involved in training. The Turin Centre's assessment is that about 60 per cent of all fellowship holders have been selected for training because they were the "best candidates available" in terms of personal qualifications and backgrounds more than that they best matched project/job/industrial sector or national needs. This arises mainly from the fact that in fellowship selection processes, governments mostly do not favour national competition for available training posts as this leads to demotivation of those not selected.

70. This lack of systematic, competitive selection means that evaluation is regarded as a formality rather than as a necessary tool for quality improvement by both the fellowship holder and some government authorities. Government officers certainly require progress reports to be made on fellowship holders, but rarely insist on strict, in-depth evaluation techniques to be applied (or to be paid for).

71. The ILO has found that evaluation procedures during training periods and follow-up phases of individual fellowship programmes have been difficult to manage. Other United Nations agencies have had the same experience. The International Telecommunication Union abandoned attempts to produce a much more substantive evaluation system than had previously been applied. The Food and Agriculture Organisation made several attempts to improve effective evaluation of follow-up phases, but found that the action required was cost prohibitive. In comparison, group training of fellows in regular courses at the Turin Centre, which include overseas study periods, are being effectively evaluated and a formal follow-up scheme is in operation.

Evaluation of individual training

72. One of the main reasons for low effectiveness in the monitoring and evaluation of individual fellowship programmes is that it is difficult to co-ordinate the actions occurring between all the partners involved in administering and implementing fellowships. To develop further levels of co-ordination, including expert evaluator visits to fellowship holders whilst in training, would increase cost disproportionately. A choice has had to be made between optimum evaluation effectiveness, irrespective of cost, and a more practical approach which gives a better efficiency/effectiveness ratio. The latter option operates at present, but is less than ideal. To improve the effectiveness of evaluation would require the introduction of mandatory instructions in ALL fellowship training plans. These instructions, as part of the administrative procedures, would require individual fellowship holders to report to a designated focal point for the last phase of their training period. In this designated "end of fellowship training" period, a preliminary evaluation would be carried out and a work plan and methodology for usefully applying the information gathered during the study phase developed under expert guidance.

Appraisal of group training

73. ILO Turin administered group training has a flexible scheme for monitoring training built into each programme. The systematic pattern of appraisal varies according to type of training programme, objectives and goals, characteristics of participants and duration of training. All phases are monitored, including workshops conducted in the country or region of origin of the participants; training at the Turin Centre; training in other overseas locations and the follow-up and feedback phases.

74. Group training appraisal involves some, or all, of the following:

- pre-course appraisal of participants;
- daily progress monitoring of participants by trainers;
- daily assessment of trainers by participants;
- weekly reviews of progress and reinforcement of weak learning areas;
- interval testing of learning gain;
- continuous assessment of project work;
- end-of-course appraisal of participants;
- end-of-course evaluation of "total training" by the participants;
- participant reports to sponsors and employers;
- follow-up validation by questionnaire, approximately one year from completion of training course.

As mentioned previously, group training can be much more effective where this also meets the needs of the technical assistance project. It allows for improved programme design and participant selection which, in turn, allows for an effective application of evaluation controls.

Certification

75. The present situation concerning the accreditation of ILO managed fellowship training depends on whether the participant was involved in-

(a) individual training;

(b) individual study tour;

(c) short workshop or seminar;

(d) group training.

For those involved in individual training and individual study tours involving vocational or management training, a certificate is given which recounts the training undertaken or the organisations, institutions and enterprises visited. Fellowship holders who attend a short seminar or workshop under the auspices of the ILO Turin Centre receive an appropriate certificate of attendance. Where a fellowship holder follows a course of group study involving exposure to several countries and involvement in project work related to their local implementation needs, then, in addition to a detailed certificate, a diploma is also awarded. At present, the diploma has no quality significance, but affirms that the fellowship holder "successfully completed the group study according to the requirements of the ILO Turin Centre". It would appear necessary to improve on present practice and for that reason the Turin Centre is presently developing an accreditation policy.

Post-project evaluation, follow-up and feedback

76. One of the main post-fellowship programme problems is to ensure that the trained national remains in post for a reasonable period after the training period has been concluded. Action taken to develop the technical expertise of a single fellowship holder in a specific subject area may be conceptually unsound, unless a commitment is made by the beneficiary government to maintain and support counterparts in project posts. This is particularly important where the training plan has been directed towards developing techniques which will lead to early self-reliance and self-generating project multipliers. Post-project evaluation is necessary if lessons are to be learnt from the past.

Improving the effectiveness of evaluation methods

77. Evaluation, as presently applied, is still a rough and ready tool indicating trends, as far as fellowship management is concerned. It is not yet a scientific process, despite its acknowledged importance. The type of evaluation and its objective depend on who is considering the need for an evaluation: beneficiary country, donor agency, executing agency or the fellowship holder - and also the level of importance accorded to it. A post-course evaluation on its own will not necessarily satisfy financial sponsors, who want to know whether their funds have been effectively used. Similarly, a cost efficiency evaluation may not satisfy a beneficiary government or institution, as they are mainly interested in the technical, economic and social impact of the training programme delivered.

78. A future measure which can be introduced as a means to improve effectiveness and efficiency of evaluation would be to set up a "tracer sampling" scheme for checking on fellowship post-programme performance. To achieve this, from 10 to 15 per cent of all fellowship programmes operating in a given period of time would have a pre-indication that they would be subject to tracer sampling. Standard monitoring techniques could be applied to the 10 per cent sample at each stage of the fellowship programme from design through to follow-up and the results carefully recorded and analysed. The findings resulting from these tracer sample analyses may be circulated, at regular intervals, to ILO headquarters, regional offices and selected technical assistance projects so as to focus more attention on the follow-up and feedback components of fellowship training.

79. Experience within the ILO, the Turin Centre and other UN agencies operating fellowship programmes has been that questionnaire techniques have not provided an effective post-project evaluation mechanism. The present trend of holding follow-up workshops or seminars for national staff who have previously been involved in a fellowship programme has proved to give more effective evaluation opportunities to the organisations involved.

Applying the results of overseas training

80. To ensure that the results of training are applied efficiently and effectively on the return of the fellowship holder at the end of his or her training period, beneficiary governments and project managements should ensure that the project is correctly set to receive and apply the trained person to the project. In many instances, an insufficiency of national support personnel or services at the time of a fellow's return means a considerable delay before an applied benefit could be obtained from the training.

IV. THE COST OF FELLOWSHIP TRAINING

Characteristics of fellowship costs

81. Cost factors are related to both location and type of training. Beneficiary governments and institutions now consider overseas fellowship training as only one component in their overall training policy. Although these are not exhaustive, main cost comparisons of different choices of location and training methods are shown in table 8.

Trends in fellowship costs

82. Ten years ago, not many institutions or enterprises in host countries levied a fee for the training of UN agency fellowship holders. In 1983, almost all training places had to be paid for, some fees being substantial. Thus, whether for group or individual training, budget allocations must be foreseen when drawing up fellowship proposals.

83. A further feature of dealing with host countries which developed in 1980-81 was that some national administering bodies required the ILO and other UN agencies to pay a fellowship placement administration charge. Several countries now levy two fees:

(a) fellowship implementation charges, also known as tuition fees, paid through the local administration agency to the host institution or enterprise;

(b) administrative charges, retained by the administering agency to cover expenses and maintain staffing in cases in which the ILO cannot act directly with the host institutions.

These costs have to be recovered from fellowship allocations and must be allowed for in the preparation of project budgets.

Table 8

Training \ Cost	High	Medium	Low
Location	Inter-regional	Regional	Local
Type	Specialised learning methods*	Individual	Group

* Specialised methods, such as computer-assisted learning, video training and correspondence courses require a substantial number of trainees before they become cost effective.

Cost components and their expected influence on fellowship training

84. In the medimum-term future, because of financial factors, regional training of fellowship holders will increase at the expense of longer distanced overseas training, unless major cost components (in particular travel cost, subsistence cost and training fees) can be maintained at their present level or even reduced. Although this increase in regional training is a positive feature to be welcomed, the restriction to international exposure of key personnel may lead to introversion within the regions, with little cross-cultural interchange between them.

85. As regards the advantages that may be obtained from an increase in regional training, it is found that, when considering the cost saving made by the implementation of regional rather than inter-regional training, studies show that the major savings are not so much on main travel and subsistence, but more on training costs. Through twinning arrangements between organisations and

institutions within the same region (particularly in Latin America) training costs are much lower than those having to be paid to enterprises in many advanced industrial countries. This saving on training fees is substantial, but it is to be expected that within the next five years the more advanced developing countries will also find it necessary to ask for much higher training fees.

Measuring the cost effectiveness of fellowship training

86. Fellowship programmes are cost effective when they ensure that the best available training is provided at an equitable price to the most appropriate participants. Providing, or obtaining, cost beneficial fellowship programmes, does not necessarily infer training at low cost. Project managers must not under-estimate present training costs and must at the same time set up stricter control measures to ensure that fellowship funds are more efficiently utilised.

87. As has been noted previously, cost-benefit factors need to be considered in parallel with the design of a fellowship training programme. The main factor affecting cost-benefit is the output to be obtained from the programme and relating this to other factors so as to ensure that the specified output is obtained efficiently. Within the budget allocation available to achieve the output, cost indicators can be prescribed for each factor relating to the progression of the training programme. The output factors are likely to be aimed at giving participants the capacity to have an impact on their national situation, within or external to technical assistance projects according to circumstances. In all cases, international fellowships have a requirement to effect change and promote self-reliance through an improved multiplication to be provided by the trainees after their training is completed. The main factors affecting the effectiveness of the training output are:

- training needs are clearly identified in respect of the output to be achieved;
- the candidates selected for training are those who will be able to promote multiplication of expertise and an increase in self-reliance capabilities;
- the selected candidates have the capability not only to benefit from the training undertaken, but also can effectively ensure that the budget allocation utilised in their favour leads to a positive motivation to make cost-beneficial application after training;
- after training the trainees have sufficient status and opportunity to apply their new knowledge and skills profitably and cost-effectively in their local situation;
- that the application of new knowledge and skills is permitted by the national authority to have a cost-beneficial impact on technical assistance;
- after the finalisation of acquisition of new knowledge and skills and their application in the local situation, the cost of training is measured against cost benefits achieved.

88. Training output is difficult to measure unless these factor values have been identified and pre-set before training. The Turin Centre has been assisting this course of action by dividing individual and group programmes (permanent courses), in training techniques and methods of effective communication, into measurable units. The ability to transfer defined units of knowledge and skill can then be utilised to measure progress as part of cost-benefit evaluations after fellowship participants return to project duties.

89. To improve the cost effectiveness of future ILO fellowship programmes:

- examples of training programme design criteria should be available to project managers;
- programme elements need to be given specific values at the time of programme design, in order that later in the programme cost-benefit estimates can be made;
- fellowship placement components in host countries should have precisely determined durations;
- training plans should have clearly defined goals and itemised objectives for each sub-component of those plans;
- the fellowship programme has to be strictly managed at all stages, from beneficiary country briefing through to follow-up and validation;
- fellowship holders' progress has to be measured at regular intervals during and after the training programme.

CONCLUSIONS

Role of fellowships in ILO technical co-operation

90. The ILO fellowships programme is a vital component of ILO technical co-operation and can make a major contribution to the goal of self-reliance in developing countries. Its success depends on the closest possible collaboration of the beneficiary country, the host country and the ILO. Efforts should continue to be made to ensure that fellowships receive due attention in the design of projects.

91. The main purposes of training abroad are -

- to gain new knowledge and skills that are not available locally, which will help advance a project's defined goals, and in particular to immerse the fellows in an advanced industrial environment;
- to make contacts with persons or organisations which on a continuous basis give new information or material help, so as to keep the post-project phase alive and healthy.

This second purpose, often forgotten or neglected during training, needs more attention so as to facilitate the take-over of project responsibilities on return from fellowship training, and especially after the departure of the international experts.

Decentralisation of fellowship programmes

92. Although the bulk of ILO fellowships are managed centrally by the Turin Centre, there has been a substantial measure of decentralisation involving ILO regional and other offices. In further decentralisation care will need to be taken to ensure that policies, standards and procedures are well established and a management system is instituted which ensure effective feedback on the progress of operations. In broad terms:

- training should be provided locally where the expertise and facilities available can provide the required level of training and quality of output;

- when not available locally, training should, wherever possible, be provided at the regional level;

- when training cannot be provided in the country or region, it should be undertaken elsewhere.

Programming fellowship training

93. Fellowship training curricula are rarely drawn up on the basis of pedagogical principles or analyses of future requirements. Greater attention must therefore be given to such considerations in the preparatory design phase of fellowships.

Nomination procedures

94. The late nomination of trainees often affects the results of fellowship training. Measures to overcome this problem should include -

- the early involvement of chief technical advisers and of the ILO area and regional offices in the decisions taken by beneficiary government departments concerning nominations;

- regular reviews by regional or area offices of the number of fellowships processed or implemented in their region or area;

- briefing sessions at the Turin Centre for new CTAs concerned with fellowship implementation;

- regular in-service training for project managers and local officials in the preparation and implementation of fellowship programmes and in follow-up procedures.

Briefing and monitoring of fellows

95. Further efforts need to be made to improve the briefing of fellows, prior to departure and on arrival, regarding the socio-cultural, technical and other aspects of the training they are to undertake. It is also necessary to institute a more effective system of monitoring the progress of training. In this effort, the beneficiary country, the host country, the Turin Centre, project management, ILO offices and the fellows themselves have an important role to play.

Post-project technical support

96. National project directors must ensure that, on return from fellowship training, personnel can work in a supportive environment after the international experts have completed their mission. In other words, national experts should have developed mechanisms to obtain technical data, professional journals, texts, contacts with equipment suppliers, etc., which do not depend on the personal contacts of the international experts. With the assistance of the ILO, CTA and regional adviser, and support from the local and regional offices, the national project director should ensure that project support needs are satisfied, for example, as regards the availability and exchange of up-to-date information and further ad hoc technical support.

Cost-effectiveness of fellowship programmes

97. Governments, national institutions and chief technical advisers need to be made more aware of suitable techniques for the evaluation of fellowship programmes and the cost control of fellowship activities. A cost-benefit analysis of the results obtained through training can be made either just before or even some time after the withdrawal of the international experts. This depends largely upon the length of the project; in long-duration programmes it can be valuable to carry out cost evaluations so as to compare the results obtained before with those identified after the withdrawal of the international experts. Evaluation and effectiveness would be improved if greater attention were paid to the setting of clear objectives in fellowship training and if there were a process of competitive selection of fellowship candidates. Programme evaluations need to be applied more regularly.

98. The Committee may wish to recommend the Governing Body to endorse the conclusions set out in paragraphs 90 to 97 above.

Geneva, 30 January 1984.

POINT FOR DECISION

Paragraph 98.

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98. *The Committee may wish to recommend the Governing Body to endorse the conclusions set out in paragraphs 90 to 97 above.*

Geneva, 30 January 1984.

POINT FOR DECISION

Paragraph 98.

APPENDIX I

Fellowships and scholarships administered by Turin Centre (1982)
(1981 figures in brackets)

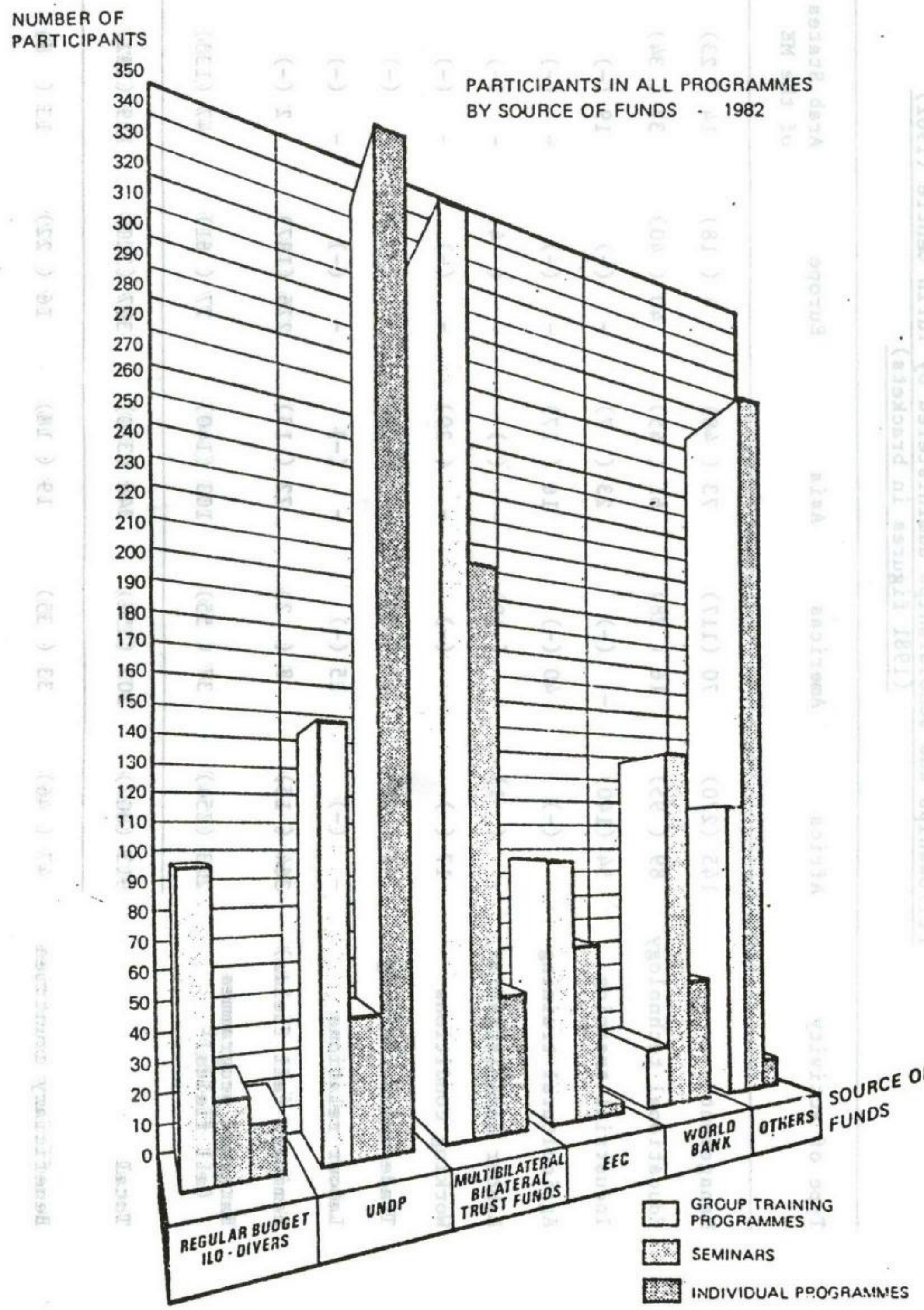
Type of activity	Africa	Americas	Asia	Europe	Arab States of the ME	Total 1982
Management	145 (270)	70 (117)	73 (48)	4 (18)	14 (23)	306 (476)
Educational technology	89 (95)	16 (28)	61 (45)	40 (40)	37 (34)	243 (242)
Industrial training	54 (140)	- (-)	23 (7)	- (-)	19 (-)	96 (147)
Agricultural training	- (-)	40 (-)	16 (17)	- (-)	- (-)	56 (17)
Labour administration	- (1)	- (12)	- (-)	- (4)	- (-)	- (17)
Working conditions	17 (-)	- (-)	- (20)	- (-)	- (-)	17 (20)
Trade union training	41 (32)	17 (36)	- (20)	- (-)	- (-)	58 (88)
Labour relations	- (-)	15 (-)	- (-)	- (-)	- (-)	15 (-)
Seminars (all fields)	364 (15)	8 (2)	72 (13)	276 (187)	2 (-)	722 (217)
External programmes (all fields)[1]	203 (254)	37 (55)	103 (140)	77 (61)	47 (135)	467 (645)
Total	913 (807)	203 (250)	348 (310)	397 (310)	119 (192)	1 980 (1 869)
Beneficiary countries	47 (46)	33 (35)	19 (18)	16 (22)	13 (8)	128 (129)

[1] Training outside Turin Centre.

Note: To the above figures should be added 137 fellowships administered by the regional offices in Bangkok (116) and Lima (21) (respectively 202 and 88 in 1981).

APPENDIX II

ILO Fellowships by type and source of funding



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APPENDIX III

Fellowship planning and programming[1]

Functions		Responsibility of			
Substantive	Administrative	Government	Donor organisation		Fellow
			Headquarters	Field	
		A. Programme preparation and formulation			
1. Initial planning (preparation of training component of project document or equivalent).		Beneficiary government	Headquarters offices	Resident Representative, project management	
2. Selection of fellow (including announcement of award, negotiations, interview of candidates, choice of successful candidate).		idem		idem	
3. Approval of the candidate on behalf of the donor organisation.				idem	
		B. Programme implementation			
4. Preparation of the detailed study programme (identifying the "gap" between selected fellow's knowledge and experience and those he should have to carry out his task; deciding the method and duration of training; selecting the host institution) in the light of previous evaluated programmes and including a projection of follow-up action.		Beneficiary government, administering agency in host country (or equivalent), Host institution		idem	Fellow participates
5. Pre-departure language training.		Beneficiary government		idem	
6. Pre-departure briefing.		idem (with host country embassy?)		idem	Participates

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Functions		Responsibility of			
Substantive	Administrative	Government	Donor organisation		Fellow
			Headquarters	Field	
	7. Payment of language tuition fees	idem,		idem	
	8. Pre-departure administrative arrangements (medical examination, visa, tickets, advance payments, payment of stipends for less than three months, etc.).	idem		Resident Representative, project management	
9. Briefing on arrival in host country.		Administering agency (or equivalent), host institution.		Country office of donor organisation or other organisation of system	idem
	10. Material arrangements (registration, housing, payment of stipends or per diem, etc.).	idem		idem	idem
	11. Solving of problems during training.	idem		idem	idem
12. Progress evaluation (progress reports).		Host institutions, administering agency (or equivalent).		Project management	idem

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Functions		Responsibility of			
Substantive	Administrative	Government	Donor organisation		Fellow
			Headquarters	Field	
13. Changes in training programme.				idem	idem
	14. Administrative arrangements on completion of study.	idem		idem	
15. Final report.		idem		idem	idem
	C. Follow-up				
16. Assignment of fellow on return home.		Beneficiary government		Resident Representative, project management	idem
17. Evaluation.		idem	Headquarters office.	idem, Regional Office	idem

[1] Report of UN Joint Inspection Unit on "Fellowships in the UN system" 76-11251 A/31/101, 1976.

APPENDIX IV

BIBLIOGRAPHY OF MAIN DOCUMENTS, REPORTS AND DATA SOURCES

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2. Administrative regulations and procedures concerning fellowships (ILO Fellowship Management).

3. Draft Chapter of the UNDP Policy and Procedures Manual on Training and Fellowship (UNDP).

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6. Co-ordination/R 1206/Add, 2-7 March 1977. Consolidated comments on the Joint Inspection Unit Report on Fellowships in the United Nations System (United Nations).

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8. CCAQ. Report of the Meeting of Fellowship Officers of the United Nations System. Geneva, 1980.

9. UNESCO. A study on methods and techniques for evaluating fellowship programmes. Paris, 1980.

10. UNESCO. Evaluation of Unesco Fellowships with particular reference to women.

11. Turin Centre Fellowship Management Instruction to Field Offices, 1 April 1982.

12. GB.214/PFA/5/4 - Report on the Turin Centre. Survey of training needs.

The World Bank
INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
INTERNATIONAL DEVELOPMENT ASSOCIATION

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December 11, 1985

Mr. F. von Mutius
Treasurer and Financial Comptroller
International Labour Office
Bureau International du Travail
1211 Geneve 22
Switzerland

Dear Mr. von Mutius:

Thank you for your letter of December 4, 1985 regarding the October seminar on disbursement operations. I am pleased to note that your staff have benefited from the presentation by Mr. Helne and that the discussions have further contributed to the mutual cooperation between our institutions.

If we can be of any further assistance please do not hesitate to contact us.

Sincerely yours,

Hans C. Hittmair
Vice President and Controller

cc: Messrs. Lee, LOADR
Helne, LOAAF
Raphaeli, PPDPR
Strombom, PPDPC
Srinivasan, PPDPC

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Votre réf. nº

Mr.Hans C. Hittmair,
Vice President and Controller,
The World Bank
1818 H. Street N.W.
WASHINGTON DC 20433

(USA)

14 DEC 1985

Dear Mr.Hittmair,

I am writing to place on record the ILO's appreciation for the co-operation provided by the World Bank in the running of the Seminar on World Bank disbursement procedures at the ILO on 23rd October 1985.

The input to the seminar provided by Antti Helne provided ILO staff members with a great deal of information and clarification on World Bank disbursement procedures and this should certainly contribute to better understanding and operational harmony between the World Bank and the ILO in the future.

On behalf of the ILO and also for my own part I would most sincerely thank you for your cooperation in this most useful seminar.

Yours sincerely,

F. von Mutius
Treasurer and Financial Comptroller

o/c

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CHRISTMAS OPEN HOUSE

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4 - 6 P.M.

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Suite 330

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We look forward to seeing you!

o/c

For the WBO Staff

Jim

James H. Quackenbush
Director

RSVP by December 13, 1985
Maxine K. Berry
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RAFAELI FROM SRIVASTAVA INFO BARTSCH. FOLLOWING LEO MANNAERT MISSION WASHINGTON LAST APRIL AND BRIEFING BY YOU AND COLLEAGUES, AM SENDING HIM DAKAR AND YAOUNDE TO GIVE SHORT SEMINAR ON ILO BANKABLE PROJECTS. WOULD APPRECIATE YOUR ASKING ONE COLLEAGUE EACH TO BE AVAILABLE FOR SHORT INTRODUCTION AND QUESTIONS AND ANSWERS DAKAR TUESDAY 29 OCTOBER AFTERNOON AND YAOUNDE TUESDAY 5 NOVEMBER AFTERNOON. HAVE ALREADY ASKED LOCAL ILO REPRESENTATIVES TO CONTACT YOUR LOCAL OFFICES AND REQUEST THIS ASSISTANCE. WOULD GREATLY APPRECIATE YOUR SUPPORT. REGARDS

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Mr. von Mutius

Notes on CCAQ Meeting, September 10, 1985

Agenda Item 6.2: "Financial Arrangements for Projects Financed by the World Bank and the International Development Association"

In introducing his colleague Alan Mole of the Loan Department, Vince Riley of the World Bank reminded the meeting that the subject of discussion was limited to the question of arrangements for contracts between World Bank borrowers and U.N. agencies. He passed out a paper which indicated the amount of disbursements to each UN agency under particular Bank-financed projects as at June 30, 1985 and asked for any corrections that the agencies might have on the figures presented.

Mr. Mole than gave his presentation on the situation of disbursements and changes that the Bank is planning to introduce. He indicated that the elapsed time in the Bank for processing disbursement requests from governments has been reduced from 23 to 11.5 days, but now to make further improvements the Bank proposes to simplify procedures by allowing the borrowers to assume increasingly responsibility for the documentation required. This devolvement of responsibility would be facilitated by training to be provided under technical assistance components of Bank-financed projects. The goal was to promote institution-building in the borrowing countries. He gave the Chairman of the meeting a copy of the new draft disbursements handbook, which could be distributed to each UN agency.

Mr. Mole expressed the Bank's disfavor with the UN agency use of the Blanket Withdrawal Application (BWA) procedure, despite its popularity with the agencies. The Bank on the other hand had agreed to an exception by allowing advances of 6 months to the UN agencies as the initial payment under a contract with a borrower country. Now, however, the Bank wants to encourage borrowers to set up Revolving Funds for disbursements under the loans/credits, from which borrowers can make payments directly to suppliers, including UN agencies, and assume responsibility for the relevant documentation. The borrower would submit withdrawal applications to the Bank from time to time to replenish its Fund. Mr. Mole saw this arrangement as an improvement for the UN agencies, who would not need to go via the Bank to receive their due payments.

Mr. von Mutius expressed the ILO's appreciation of the continued dialogue with the Bank on this subject and mentioned the October 1985 Bank disbursements/procurement seminar to be held in Geneva during three days. But he was still concerned about the relative insignificance of UN agency contracts in terms of total Bank disbursements under projects. He felt there was considerable interest in both the Bank and the agencies to increase the imvolvement of the agencies in implementing technical assistance components under the projects. The UN agencies had three particular advantages to offer borrower countries that could not be matched by private firms: (1) familiarity with the institutions, the people, and the setting of the borrower country, (2) maintenance of a continuous dialogue with the institution deriving from our relationship with the institution, and (3) our non-profit basis of operation. Indeed, the UN agencies are subsidizing their assistance under Bank-financed projects, since they charge only 13% overheads, whereas costs were closer to 20-23% of the value of the projects. Furthermore, as promoted by the World Bank, we are developing self-reliance in the countries -- we're not afraid to work ourselves out of business.

As regards the payment situation, however, we have serious concerns, he underlined. Basically, we are at the mercy of the borrowers as regards payments due the ILO. Speeding up the process of payment was not really a problem of lack of training, as implied by Mr. Mole, but rather was much more complex, due to bureaucratic procedures in the borrower countries that can require handling by as many as 24 different persons before the payment can be effected. For this reason, the BWA procedure was precious to the ILO; in fact, it was almost a prerequisite for use to continue our involvement under Bank-financed projects. If we're not paid, we have to finance the cost from other member governments' money, for which we have no authority. And now there are other problems arising which put us to the limit of our flexibility, such as the request by one government for us to post a performance bond in submitting our offer for a project (and on which the Bank declined to help us). The UN agencies are honest organizations -- why should we be required to meet such a condition? Their government representatives sit on our governing bodies. Are we to become profit-oriented to be able to cover losses from our profits?

So far, the ILO has been willing to shed its bureaucratic procedures to accomodate World Bank regulations, but now we face real problems. We need to appeal to "Godfather" -- the World Bank -- to help us on these.

The UNIDO representative agreed wholeheartedly with Mr. von Mutius' position. UNIDO was in competition with firms for borrower country contracts, but so far had not succeeded in winning a single contract. Furthermore, he felt that under the proposed changes in disbursements the UNIDO would have more difficulty in collecting its payments due from governments.

The UNESCO representative agreed that BWA procedures were essential for its involvement under Bank-financed projects. UNESCO had had a "horrendous experience" with Revolving Fund arrangements -- governments not paying UNESCO for services delivered.

The United Nations representative (Psazs?) argued that the UN agencies shouldn't be lumped together with private firms as suppliers of services to borrower countries, as they had no profits to cover losses. We cannot put up performance bonds. It was unrealistic to expect UN agencies to compete with private firms.

The ICAO representative also felt that the proposed Revolving Fund procedures would create more problems and argued for retaining either the six-month advance arrangement or the BWA procedure.

In response to these concerns, Mr. Mole argued that the new procedures would make life easier for the suppliers, including the UN agencies, as well as for the borrowers, the main beneficiary of the proposals. If the borrower learns the Bank procedures, then it would understand the problems of the suppliers. However, he was not saying that the Bank will not accept the BWA procedure, though it should not be looked upon as a "letter of credit", a guaranty of payment. The Bank does informally block the amount of a UN contract under a BWA ("committed funds"), but the borrower can revoke the arrangement if it wishes. He noted that the Bank has determined that elapsed time in the country for making payments is about 3-4 months on the average, so the Bank was also concerned about speeding up payments to suppliers; one way would be to educate the government officials handling payments arrangements.

After Mr. Mole's reply, the Chairman was obliged to cut off discussion, as time was running out and another speaker was waiting outside the meeting room to introduce his subject.

W. H. Bartsch
13 September 1985

DGS/LPE(F/PROF/OPS)

Reference VT 66-6-69

C.

MINUTE SHEET

Mr. Torres-Abreu (JUR)

Subject: Competitive Proposal for Vocational Training Project with the PVTD of the Government of Egypt.

Herewith copy of letter of invitation to submit a proposal, together with the tender document. I should appreciate your comments on the acceptability of the agreement enclosed in the tender document.

8 October 1984

Douglas G. Shaw
F/PROF/OPS

Mr. Shaw (F/PROF/OPS)

Certain of the provisions of the proposed contract are contrary to the ILO regulations and standard practices and cannot be accepted. This is clearly the case, in particular, with Article 6 (Financial Guarantee Deposit) and Article 9 (Penalties).

In my opinion, the ILO should insist in using the ILO standard ~~text~~ for funds-in-trust projects, which was used, with some modifications, for other projects of the same nature in Egypt.

10.10.84

A. Torres Abreu.

12/10

Please use both sides
Continuez au verso

DGS/JH (F/PROF/OPS)
7.12.1984

cc. Mr. O. Ahmed
ILO Cairo
REL/AFR
R.O. Addis Ababa
Mr. Bartsch, ILO
Washington

INVEST
P/COTEC
BUDFIN
Mr. Prosser
IBRD
F/PROF/URB

D.

6838

VT 66-6-69

Mr. Kamal Ahmed Abu El Ella
General Manager, Purchasing Dept.,
General Organisation for
Industrialisation,
6 Khalil Agha Street
Garden City
CAIRO

(Egypt)

7 December 1984

Dear Sir,

Subject: Adj. No. 13/84 for technical assistance (experts and fellowships) to develop programmes in Productivity and Vocational Training Department (PVTD)

1. In accordance with the terms of your letter of 12 September 1984, as amplified by your telex received in our Cairo Office on 28 November 1984, we have carefully studied the tender documents comprising Parts I, II and III and we hereby agree to prepare and submit to you the consulting and technical assistance services in conformity with your entire satisfaction.

2. In accordance with the said documents and conditions, we are offering our Tender in two sealed envelopes:

Envelope A (Technical Tender without price) which includes the following:

(a) a detailed work programme showing procedure and periods proposed to carry out the above-mentioned service;

(b) numbers, qualification and classification of the specialists necessary to meet the work programme;

Envelope B: concerning prices of Tender and remuneration for every specialist.

3. We hereby accept the terms of payment and general conditions of Part II, subject only to the provisions of any over-riding agreements to which the Government and the ILO may be party, including any regulations formulated under those agreements, whose implications would, in accordance with standard practice, be

identified and resolved during negotiation of any formal agreement for provision of the above-mentioned services. In accordance with agreed usual procedure of agencies of the United Nations Organisation, no letter of guarantee for Tender Bond is enclosed.

4. It is confirmed, as requested in your telex, that all training reports and programmes will be submitted in the Arabic language and that all equipment supplied by the Project for preparing the training programmes will at the termination of the Project be left free of charge with the FVTD.

5. It is understood that any Tender referring to prices in Evelope A or delivered later than the closing date will not be considered.

6. It is understood that GOFI reserves the right to reject any part or all of the Tender and to award the contract to the Tenderer who can execute the work in the expedient manner.

7. It is also understood that we undertake in the event of our Tender being accepted and receiving GOFI's notification thereof to sign the Contract within 10 (ten) days from such notification.

8. In the event that our Tender is accepted, we undertake subject to the provisions referred to in para. 3 above to comply with the conditions in Parts I, II and III of the Tender Documents.

Yours sincerely,

Allan Salt
Chief,
Vocational Training Branch
Training Department

Duly authorised to sign Tender for and on behalf of the Director-General

Witness: Douglas G. Shaw
Occupation: Officer-in-Charge,
Operational Development Section
Vocational Training Branch

B. IG /

AY FOLLOWING TELEX
TECHNICAL
G DEPARTMENT (PVTD)
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URB
CC-OPS

312 FOR SALT F/PROF FROM OSMAN AHMED. RECEIVED TODAY FOLLOWING TELEX
FROM GOFI QUOTE RE: INVITATION TO BID NO 13/84 FOR TECHNICAL
ASSISTANCE FOR PRODUCTIVITY AND VOCATIONAL TRAINING DEPARTMENT (PVTD)
* REFERING TO YOUR OFFER SUBMITTED UNDER THE A/M BID AND TO ENABLE
* US TO TAKE OUR FINAL DECISION IN A PROPER WAY.
* YOU ARE KINDLY REQUESTED TO SEND US NOT LATER THAN TWO WEEKS YOUR
* REPLY TO THE FOLLOWING:
* I. TECHNICAL REQUIREMENT
* ---------------------------

1. ANNEX (NO 3) ITEM (CONSULTANCY AND MISCELLANEOUS) UNDER
* LIST OF EXPERTS THE FOLLOWING SHOULD BE INCLUDED:

	MAN/MONTH
- TOOL AND DIE MAKING	3
-MECHANICAL/ELECTRICAL AUTOMOTIVE	4
- MECHANICAL MEASUREMENT	3
- PRINTING TRADES	4

* 2. YOUR CONFIRMATION THAT YOU WILL SUBMIT ALL REPORTS AND PROGRAMS
* IN ARABIC.

* 3. YOUR EXPALANATION FOR:
* A) SYSTEM OF 'CREDITS'
* B) THE SYSTEM OF MES (MODULES OF EMPLOYABLE SKILL)
* C) DECREASING THE DURATION OF EXPERTS FOR ANNEX (NO. 3) ITEM
(CONSULTANCY AND MISCELLANEOUS) SHOULD BE 14 MAN/MONTH.
* D) SUBMIT YOUR SCHEDULE FOR P.V.T.D. HEADQUARTERS.

* II. FINANCIAL ASPECTS:
* ------------------------
* 1. SUBMIT YOUR COMPLETE TERMS OF PAYMENTS TAKING INTO CONSIDERATION
* THE CONDITIONS STATED IN THE I.F.B. DOCUMENTS.
* 2.EXTEND THE VALIDITY OF YOUR OFFER UP TO 12/6/1985 AND LETTER OF
* GUARANTEE ONE MONTH LATER.

* III. GENERAL CONDITION:
* ------------------------
* CONFIRM YOUR ACCEPTANCE FOR THE GENERAL CONDITION (PART II) AS
* STATED IN OUR TENDER BOOK.

* SIGNED- DEPUTY CHAIRMAN
* ENG/ SHAWKY EL NAHAS- 22/4/85

* UNQUOTE
* KINDLY TAKE NECESSARY ACTION AND ADVISE. REGARDS
* INTERLAB CAIRO
* ATTN: MR. SALT F/PROF
22271A BIT CH
* 94269 ILOCA UN

RECEIVED
2 4 APR 1985

RECEIVED
24 APR 1985
F/PROF.

BIT-REGISTRY GENEVA
014191 | 24 AVR.85
REF.: F/PROF

(F/PROF/OPS)

cc. Mr. O. Ahmed, ILO Cairo
Mr. Prosser, IBRD
RO Addis-Ababa
Mr. Bartsch, ILO Washington
REL/AFR
INVEST
P/COTEC
BUDFIN
F/PROF/URB
ILO Turin Centre

F.

6838

VT 66-6-69

Mr. Kamal Ahmed Abu El Ella
General Manager, Purchasing Dept.,
General Organisation for
Industrialisation,
6 Khalil Agha Street
Garden City
CAIRO

(Egypte)

Dear Sir,

Subject : Adj. No. 13/84 for technical assistance (experts and fellowships) to develop programmes in Productivity and Vocational Training Department (PVTD)

We have the pleasure to respond to your telex of 24 April 1985 to our Cairo Office, which was relayed to us on that date.

Your reference I.1.

Post No. 10 Tool and Die Making	3 M/M;
Post No. 11 Mechanical/Electrical Automotive	4 M/M;
Post No. 12 Mechanical Measurement	3 M/M;
Post No. 13 Printing Trades	4 M/M,

We have carefully selected four outstanding candidates. All of them have had appropriate overseas experience. Complete curricula vitae are enclosed as attachments 1, 2, 3 and 4.

A revised page 29 of the technical proposal incorporating the four additional posts and names of experts is enclosed as attachment 5 which you may wish to substitute for the original.

Your reference I.2.

It is confirmed that all reports and programmes will be submitted in the Arabic language (as stated in the covering letter dated 7 December 1984 to our proposal - copy attached for easy reference).

/...

Your reference I.3.A.

A brief explanation of the proposed credit system is enclosed as attachment 6.

Your reference I.3.B.

A brief explanation of the MES (Modules of Employable Skills) is enclosed as attachment 7.

Your reference I.3.C.

The number of man/months for short-term consultancies has been increased from 5 to 14 as requested; and specifically allocated in accordance with I.1. above.

The bar chart (financial proposal page 7 and technical proposal page 28) should be amended by deleting "short-term consultants - 5 m/m" and inserting new posts 10, 11, 12 and 13 as I.1. above.

Your reference I.3.D.

Proposed outline schedule describing possible options for PVTD Headquarters fellowships is enclosed as attachment 8.

Your reference II.1.

Schedule of payments, in conformity with United Nations and ILO regulations, is enclosed in a separate envelope as an Annex to the amended financial proposal.

Your reference II.2.

It is agreed that our offer is hereby extended up to 12 June 1985. However, in view of the delay in starting the project, certain adjustments have been made to our budget. Accordingly, a revised financial proposal is enclosed in a separate envelope. As explained in our original covering letter, in accordance with the agreed usual procedure for proposals from agencies of the United Nations Organisation in World Bank financed projects, no letter of guarantee for Tender Bond is enclosed.

Your reference III.

Our general acceptance was stated in paragraph 3 of our original covering letter as follows "We hereby accept the terms of payment and general conditions of Part II; subject only to the provisions of any over-riding agreements to which the Government and the ILO may be party, including any regulations formulated under those agreements, whose implications would, in accordance with standard practice, be identified and resolved during negotiation of any formal agreement for provision of the above-mentioned services". However, there are clauses in your General Conditions which conflict with UN-ILO regulations and practice. For this reason, it is strongly recommended that the standard form of agreement, as developed

/...

by the World Bank for use by UN Agencies (amended as necessary) be used. It is important to note that this form of agreement has already been used for ILO executed projects in the Arab Republic of Egypt with PVTD, the Ministry of Social Affairs and TOMOHAR. Sample agreement is enclosed as attachment 9.

We have attempted to respond in detail to each of your questions. Should you have any further question or require any clarification, we should be pleased to respond without delay.

Yours sincerely,

Allan Salt
Chief
Vocational Training Branch
Training Department.

Duly authorised to sign Tender for
and on behalf of the Director-General.

Witness : Douglas G. Shaw
Occupation : Officer-in-Charge
Operational Development Section
Vocational Training Branch.

DS/MD (F/PROF/OPS)

Reference VT 66-6-69

MINUTE SHEET

RECEIVED FINAD 29 AUG 1985

cc: Mr. Srivastava

Mr. Salt 078 29.8

Mr. Kanawaty 6.K. 29/8

Mr. Von Mutius

Subject: Arab Republic of Egypt (GOFI)
IBRD Project for PVTD

1. In December 1984 ILO submitted technical and financial proposals to GOFI under International Competition Bidding. There was a short list of six organisations, and the following four submitted proposals

ILO
British Council
GTZ
RCA

2. In April 1985 a telex from GOFI was relayed by the ILO Cairo Office requesting supplementary information and requesting certain changes to be made in our proposal. The necessary information, together with a revised financial proposal, was transmitted to GOFI in May 1985.

3. The attached telex (item A) was received on 20 August requesting

(a) our "final rock bottom prices offer",

(b) acceptance of GOFI's General Conditions Part II without any reservations (item B).

4. A revised budget is being prepared in co-operation with the Turin Centre, P/COTEC and BUD/CT; but the acceptance of GOFI's conditions without any reservation presents a problem. When the original letter of invitation was received GOFI's General Conditions were shown to Juridique and discussed with Mr. Torres Abreu. His view was briefly expressed in a minute of 10 October 1984 (item C).

5. Accordingly, our covering letter sent with the technical and financial proposals attempted to satisfy GOFI's requirements while limiting ILO's acceptance of them (item D - especially para 3). When I visited GOFI in December 1984 I was informed this was not acceptable, and so Mr. Osman Ahmed sent a further letter of explanat: requesting GOFI to use the standard form of agreement designed for use by the specialised agencies of the United Nations, and informing GOFI that this form of agreement (modified to meet the Government's requirements) had been used with other ministries.

6. GOFI re-iterated its requirement for acceptance of its General Conditions when requesting submission of a revised proposal in April 1985 (item E). We further explained ILO's position in our covering letter of 3 May 1985 (item F - especially under headings "Your reference II 2" and "Your reference III".

7. It would seem a great pity at this stage if the chance of our continued work with PVTD, with whom we have an excellent relationshi

Please use both sides
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and the opportunity of implementing our important project with PVTD (we hear unofficially that our proposal was rated the best on technical grounds) should be prejudiced by a difficulty over the terms of the Agreement. It would be appreciated therefore if you take up this question at IBRD, during your forthcoming mission, possibly with Mr. Nimrod Raphaeli, Adviser UN/UNDP Programme and Project operations, Mr. William Cooper, Technical Co-operation Adviser or Mr. Vincent Riley, Adviser UN/UNDP Liaison and Policy Co-operation.

8. In the meantime we shall submit our revised financial proposal as requested.

29.8.85

~~D. Shaw~~
~~F/PROF/OPS~~

A

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* ✠
22271A BIT CH
* 94269 ILOCA UN
* 19.8.85

OPS
cc Invest
Mr. Martens Bud CP
Mr. Ilancevaly P/Coler
Unv - Mr. Rk
Turin

BIT-REGISTRY GENEVE
028982 19 AOUT 85
ACTION:
INFORM: F/PROF
REF.:

* 709 URGENT FOR SALT F/PROF FROM TAWFIK RE INVITATION TO BID NO. 13/84
* TECHNICAL ASSISTANCE FOR P.V.T.D. DEVELOPMENT OF INSTRUCTORS TRG.
* INSTITUTE TELEX FROM GOFI QUOTE RE: INVITATION TO BID NO 13/84 FOR
* TECHNICAL ASSISTANCE FOR PRODUCTIVITY AND VOCATIONAL TRAINING DEPART
* MENT (P.V.T.D.) PLEASE BE INFORMED THAT THE DUE DATE FOR OPENING THE
* PRICE ENVELOPE IS 15/9/1985 AT 12 O'CLOCK. YOU ARE REQUESTED TO
* SUBMIT YOUR COMPLETE FINAL ROCK BOTTOM PRICES OFFER (ITEMIZED
* SUBTOTAL AND TOTAL) IN A SEALED ENVELOPE ACCORDING TO THE FOLLOWING:

* I: TECHNICAL ASPECTS:
* --------------------
* ITEMIZED PRICES FOR EACH ANNEX OF YOUR TECHNICAL OFFER AND THE FINAL
* ACCEPTED TECHNICAL AMENDMENTS ACCORDING TO I.T.B. DOCUMENTS,
* DISCUSSIONS AND TELEXES AGREED UPON.

* II: FINANCIAL ASPECTS:
* ---------------------
* SEPARATE ITEMIZED PRICES FOR:
* 1- TECHNICAL ASSISTANCE
* 2- FELLOWSHIPS
* STATING ALL CHARGES, FEES AND RATES CLEARLY AND SEPARATELY TAKING
* INTO CONSIDERATION TERMS OF PAYMENTS AND CONDITIONS STATED IN
* I.T.B DOCUMENTS.

RECEIVED
20 AUG 1985
F/PROF/CPS

RECEIVED
20 AUG 1985
F/PROF

* III: GENERAL CONDITIONS:
* ----------------------
* PLEASE CONFIRM YOUR ACCEPTANCE FOR OUR GENERAL CONDITIONS PART II
* WITHOUT ANY RESERVATIONS. BEST REGARDS. SIGNED ENG. MAHMOUD KHALIL
* MELIGUI, DIRECTOR GENERAL ADMINISTRATION FOR TECHNICAL AFFAIRS.
* UNQUOTE. PLEASE ADVISE. REGARDS.
* INTERLAB CAIRO✠
22271A BIT CH
* 94269 ILOCA UN

EQUIPRO

B.

GOFI's proposed text,

Part II

pages 26
28
31

Article (1)

1. The following words and expressions in the contract have the meanings stipulated hereinafter:-

GOFI: Means General Organization for Industrialization 6 Khalil Agha Street, Garden City, Cairo, ARE.

Consultant: Means Successful bidder whose bid has been accepted in writing by GOFI and who shall entered into contract.

Assingee: or"PVTD" meand Productivity and Vocational Training Department.

Contract: Means the contract signed between G.O.F.I. and the Consultant.

2. Words importing the singular only also include the plural and vice-versa where the context requires.

ARTICLE 2

Object of Contract

The Consultant undertakes to perform the Services under the Contract. The Services will be specified in detail in an Annex to the Contract.

ARTICLE 3

Contract Price

G.O.F.I. shall pay to the Consultant the total prices of the Services under the Contract.

The Contract prices are fixed prices and cannot be effected by any increase whatsoever.

ARTICLE 4

Terms Of Payment

The prices stated in article 3 above shall be paid according to what will be agreed upon between both parties on the basis stipulated in Article 4 Part I hereinbefor.

ARTICLE 5

Taxes, Duties & Bank Charges

All taxes, duties and bank charges which may be incurred in the territory of the A.R.E. on payment due to the Consultant or his personnel under the Contract shall be paid and borne by G.O.F.I.

However, in case an agreement for the avoidance of double taxation and prevention of fiscal erasion is valid between the A.R.E. and the Consultant's country, then the Consultant shall pay and bear the taxes and duties to be paid in A.R.E. in connection with his activities under the Contract in accordance with the provission of such agreement.

All taxes, duties and Bank charges which may be incurred outside the territory of the A.R.E. in connection with the Contract shall be paid and borne by the Consultant.

However all taxes, duties and Bank charges, for the Letters of Guarantee to be submitted by the Consultant, which incurred outside and inside the A.R.E. are to be paid and borne by G.O.F.I.

ARTICLE 6

Final Guarantee Deposit

1. The consultant shall within 30 (Thirty) days from the date of signing this Contract submit to G.O.F.I. letter of Guarantee amounting to 10% of the total contract price as a Guarantee deposit.
This letter of Guarantee shall be issued by a first class bank in favour of G.O.F.I. and endersed by a first class bank in the A.R.E. The text of this letter of Guarantee is attached as Annex No. 1 to this Part II.

2. The said letter of Guarantee shall be held by G.O.F.I. as a pecuniary Guarantee for the due execution and proper performance of this contract and the recovery of any penalties, or other sums for which the Consultant may become liable to G.O.F.I. under this Contract. It shall be valid until the fulfilment by the Consultant of all his obligations under the Contract.

3. G.O.F.I. may, at any time, on giving prior notice to the Consultant, deduct from the amount of the said letter of Guarantee any time for which the consultant

Claims . . .

many become to G.O.F.I. under this Contract and which ar not promptly paid by him. G.O.F.I. shall be entitled on its first demand to the immediate payment by the bank up to the full amount of the letter of Guarantee notwithsta any contestation by the Consultant or any third party.

4. G.O.F.I., However shall pay back to the Consultant the de ducted amount in the same currency as it has been deducte if the Consultant refers the matter to Arbitration and th arbitration tribunal has decided that the claim on which the deduction as based is unjestifued and that the deduct amount has to be refunded to the Consultant.

5. The above montioned letter of Guarantee shall not in any way be construed as a limitation of the Consultant's resp sibility for his obligations and guarantees under

ARTICLE 7

Preparation & Delivery Of Documents

All reports, data and any other documents prepared by the Consultant under this Contract shall be written in English language.

The Consultant shall prepare and hand over the required reports and all other documents to G.O.F.I. at its respective address.

ARTICLE 8

Time Schedule

The time schedule for performing the Services under the Contract shall be according to what will be agreed upon between both parties.

another open-ended issue

ARTICLE 9

PENALTIES

Without prejudice to Article 17 concerning force majeure, in case the Consultant fails to complete any of his Services within its time of completion, then G.O.F.I. shall be entitled to inflict a penalty of 1% (One percent) of the total Contract price for every week of delay or part thereof. The total penalty under this Article shall not exceed 5% (Five percent) of the total contract price.

The penalty shall be inflicted by the sole fact of delay.

ARTICLE 10

Standard of Services

The Consultant shall, in all matters under the Contract, act as a faithful adviser to GOFI.

The Consultant shall exercise all reasonable skill, care and diligence in the discharge of his duties and shall carry out all Services required under the Contract in Accordance with the highest international standards and practices and in conformity with the lates appropriate designs and processes.

It is intended that there will be constant open and candid communication and that the Consultant shall accomodate the desires and request of GOFI withen the scope of the Contract.

ARTICLE 11

Responsibility of the Consultant

The Consultant shall be responsible for any error, discrepancy or ommission in the designs, drawings, studies, specification, documents and other Services furnished or approved by him under the Contract.

The Consultant undertakes the responsibility for the correctness and completeness of all Services under the Contract, including studies, designs, data and in general all Services to be rendered by him under the Contract.

ARTICLE 12

Consultant's Representative

The Consultant shall within 30 days from the date of coming into force of the Contract designate by a written notice to GOFI his representative acting as project co-ordinator who shall, be responsible for the consultant's Services under the Contract, be authorized to make the necessary decision under the Contract on behalf of the Consultant and be the efficial counterpart to the Sponser's representative.

ARTICLE 13

Right of Inspection

GOFI shall have the right to designate representative to review, inspect and approve the Consultant's Services at any time during its progress.

The Consultant shall allow GOFI in performing such inspection and shall provide proper facilities therefore.

The approvals by GOFI or GOFI's representatives shall not relieve the Consultant from his responsibilities for the adequency, correctness and completeness of his Services under the Contract.

ARTICLE 14

Responsibility of GOFI

GOFI shall furnish available data, and information to the Consultant and shall give any assistance as shall reasonably be required by the Consultant for carrying out of his service under the Contract.

COFI shall assist the Consultant in obtaining entry and exit visas.

GOFI shall provide the Consultant with the facilities stipulated in Annex No.

ARTICLE 15

Property and Copyright of Documents

All documents, reports, drawings, designs, data and other evidence of Service prepared by the Consultant under the Contract shall become the property and copyright of GOFI, and the Consultant shall not be entitled either directly or indirectly to make use of such documents for his own use or for a use beyond the scope of the contract without the prior written approval of GOFI.

The copyright of all documents handed over to the consultant by GOFI under the contract shall remain the property of GOFI, and the consultant shall not be entitled either directly or indirectly to make use of these documents for carrying out any work other than for GOFI without the prior written approval of GOFI.

ARTICLE 16

Consultant Personnel

1. The Consultant shall employe and assign skilled and qualified personnel acceptable to GOFI to perform all Services under the Contract.

   The Number, Categories and period of services shall be stated in an Annex to the contract.

2. The Consultant's personnel assigned to work at resident Personnel at the site has to be approved by GOFI.
3. Prior to replacement of any resident Personnel, the Consultant shall notify GOFI reasonably in advance and shall submit justification (including proposed substitutions(s) in sufficient details to permit evaluation of the impact on the performance of his obligations under the Contract. Any replacement must be approved, in advance, by GOFI.
4. The Consultant shall exercise sole control over his Personnel.
5. In the event that any Consultant's Personnel has not performed satisfactory, the Consultant shall replace him by another one having equivalent qualification and capable to perform the Services.
6. When the Consultant replaces any of his Personnel in accordance with this article, the cost of such replace ment shall be borne and paid by the Consultant.

ARTICLE 17

Confidentiality

The Consultant shall treat all matters in connection with the Contract as strictly confidential and shall not publish or cause to be published any information on technical or any other aspects of the Services without the prior written approval of G.O.F.I.

ARTICLE 18

Cancellation

Both parties shall be responsible for the fulfilment of their contractual obligations.

Without prejudice to any remedy available, GOFI shall be entitled to cancel the Contract in whole or in part in case the Consultant fails to fulfil any of his essential obligation within a maximum period of 3 (three) months from its due date. The Consultant is also entitled to cancel the Contract in case. GOFI fails to fulfil its essential obligation concerning payment within a maximum period of 3 (three) months from its due date.

The above mentioned cancellation shall take place by a registered letter to be sent to the defaulting party's address without further formalities or judicial proceedings.

ARTICLE 17

Force Majeure

1. Force Majeure are contingencies caused by neither of the parties, and which are unforseeable at the time of concluding the contract and beyond the control of either party, and which render the further performance of the contractual obligations impossible.

2. Neither party shall be deemed to be in default of its contractual obligations whilest performance thereof is prevented by force Majeure and the time limits laid down in the Contract for the performance

of such obligations shall accordingly be extended by a period equal to that during which the force Majeure contingencies operated.

3. Upon the occurence and cessation of Force Majeure, the party suffering thereform shall immediately give the either party notice confirmed by an official evidence.

4. In case the period of force majeure exceeds 6 (six) months, then both parties shall agree on the necessary arrangements for the further implementation of the Contract. In case such further implementation is impossible, then both parties shall arrange for the termination of the Contract, without prejuice to their rights and obligations prior to such termination.

5. No indemnity shall be cllimed by either party due to Force Majeure.

ARTICLE 20

Settlement of Disputes

1. The Contract shall interpreted, construed and governed by the Egyptian laws.

2. Any dispute or difference arising out of or in connection with the contract shall be settled amicably between the parties. In default of amicable agreement the disputs shall be finally settled under the rules of conciliation and arbitration of the International Chamber of Commerce in Paris by an arbitration committee of three arbitrators, to be appointed in accordance with the said rules.

3. The arbitration committee shall meet at any place to be agreed upon by the parties. Failing such an agreement the meetings shall be held in paris.

4. In case the parties do not determine by mutual agreement the law to be applied to the substance of dispute or difference, than the arbitration committee shall apply the law with which the contract has the most real connection as shown by the objective facts of the case. In both cases the arbitration committee shall take into consideration the terms of the contract and trade usages.

5. The arbitral award shall be final and subject to no appeal and shall deal with the question of the costs of arbitration and all matters relating thereto.

ARTICLE 21

Assignment of Contract

GOFI shall assign its right and obligations drived from the contract to Productivity and Vocational Training Department herein referred as the assigne.

The assignment shall automatically take place on the date of signing the Contract.

The consultant shall not be entitled to assign the contract in whole or in part without the prior written consent of the organization in such case the consultant shall remain jointly and severally responsible with the assigne for the execution of the contract or part there of as the case may be.

ARTICLE 22

Effective Date of the Contract.

The Contract is subject to the approval of the acceptance authorities in both countries.

The effective date of the Contract shall be the date when all the following are fulfilled:

1. Transferring of the advance payment to the Consultant against a letter of guarantee ofthe same value and currency.

2. Submitting the letter of Guarantee referred to in Article 6.

ANNEX NO. 1

tO PART II.

Form of letter of Guarantee for the

Due Erecution And Proper Performance of Contract

To:

Dear Sirs,

With reference to the Contract concluded between GOFI, ARE and Messers:.................................... Hereinafter referred to as "The Consultant" for the total Contract price of ....

We hereby irrevocably and unconditionally Guarantee the Contractor up to the sum of 10% of the total Contract, price i.e. .... for the due execution and proper performance of the Contract, and,

We undertake to pay you on your first demand in writing to us any amount you may claim up to and not exceeding this sum, notwithstanding any contestation of the Consultant or any other party.

This letter of guarantee shall be valid from the day it is issued until the fulfilment of the Consultant's obligations and guarantees under the Contract, i.e. until ....

Should we receive no claim from you up to the date of expiry of this letter of Guarantee our liability will become Null and Void.

Please return to us this letter of Guarantee as soon as its validity expires.

BANK

THE WORLD BANK INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

DATE August 13, 1985

TO Mr. W. Paati Ofosu-Amaah, LEGEA

FROM Nimrod Raphaeli, Adviser, UN/UNDP Operations

EXTENSION 76955

SUBJECT Work Program for FY86

For the remainder of FY86, your assistance will be needed in the following activities:

a. Negotiating with FAO, ILO and UNIDO a new contract for providing management assistance to Bank borrowers

b. Negotiating with UNIDO a new Cooperative Agreement

c. Revision of OMS 4.30 on Bank/UNDP Operational relations

However, as in the past, joint Bank/UN/UNDP operational activities are not planned and there will be more than a few occasions where your ad hoc assistance will be both needed and appreciated.

NRaphaeli:vcc

OFFICE MEMORANDUM

12o

DATE June 14, 1985

TO C. Willoughby EDIDR and
F. Lethem EAPIT

FROM Robert Youker EAPIT

Bob Youker

SUBJECT Back to Office Report
INTERMAN SYMPOSIUM
ILO/Geneva May 16 & 17, 1985

1. INTERMAN is an ILO executed, UNDP financed communication network between organizations interested in management improvement in developing countries. The purpose of this meeting was to evaluate progress to date, to develop plans for the future, and to lay the foundation for raising revenue to make INTERMAN viable and self-sustaining. (See Annex 1, State and Perspectives). The symposium was attended by more than 100 persons representing 52 countries and 12 international organizations (list attached as Annex II).

2. The conclusion of the meeting was that INTERMAN is useful and should be continued, improved and expanded. The meeting was valuable for me to be able to meet a large number of persons in one place in a short period of time including twelve from East African institutions. I also think it was useful for the Bank to be seen as participating with INTERMAN.

3. INTERMAN is a source of information for bank staff interested in management development. Their quarterly MDRS Bulletin contains useful information on the activities of management institutes around the world. (sample contents attached as Annex III). I have a complete set of Bulletins and other publications available in my office. EDI has submitted a profile and is a member of INTERMAN. One of the INTERMAN publications is a collection of profiles forming a directory of management institutes around the world.

4. General Comments

a. Business oriented institutes and regional associations of business oriented institutes were better represented than public administration institutes. The other UN agencies, like FAO, were also not represented.

b. There were very useful exchanges of information between more advanced and lesser advanced developing countries.

c. There was confusion over the regular activities of ILO and the separate activities of INTERMAN managed by ILO. There was also confusion between the role of INTERMAN as a communication network and ILO as a producer of knowledge on management development.

d. There are a number of steps INTERMAN is considering to improve its services resulting from the comments of users.

5. Specific Actions and Recommendations

a. EDI has not been active in using INTERMAN as a promotion mechanism for EDI training materials. EDI might submit information on training materials such as TVM and course curricula.

b. The French speaking African management institutes formed a loose association and appointed Mr. Kondolo Kashala of CEPETEDE, Zaire as their coordinator. Their initial effort will be a case clearing house and I said EDI would supply French language teaching materials when the mechanism is established.

c. I was most impressed with the presentations of the representatives of CLADEA, the Latin American association of management institutes. In addition, there were presentations by the Asian Productivity Organization, Coordinating Council for Management Development Institution of Socialist Countries, the European Foundation for Management Development, the American Assembly of Collegiate Schools of Business, the International Association of Schools and Institutes of Administration and the Arab Organization of Administrative Sciences.

d. Mary Tanton and Mark Easterby-Smith of the Centre for the Study of Management Learning at the University of Lancaster, U.K., did a survey of 21 countries and presented a paper on International Issues in Management Education and Implications for Training of Trainers. The five most cited problems were lack of:

i. recognition for training
ii. funds and facilities
iii. qualified teachers
iv. relevant national literature
v. collaboration between practitioners and universities

e. The representatives of IESE of Spain and IPADE of Mexico presented an interesting case study of twinning. The secrets of success were:

i) started with support of environment and clients in form of a group of local businessmen.
ii) assembled a strong local teaching staff at the beginning.
iii) started giving short courses for top executives with help from spanish professors.
iv) did not invest in buildings but instead developed local teaching materials.
v) collaboration has continued over the years but in new areas and mutual learning.

Mr. Sinha of the Administrative Staff College of India presented a case study of their collaboration with overseas institutions including EDI. I have a copy in my office.

6. Reports of the meeting will be published in the next INTERMAN MDRS Bulletin. In addition to EDI, I think each region and PPDPS might like to get on the mailing list for INTERMAN. INTERMAN also represents an inexpensive communication device for the bank to an interesting mailing list of management development professionals around the world. The INTERMAN address is:

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INTERMAN Project Coordinator
Management Development Branch
International Labour Organization
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Geneva 22 Switzerland

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RYouker:ee

INTERMAN

ANNEX I

STATE AND PERSPECTIVES

February 1985

* * * *

1. PAST AND PRESENT

The ILO/UNDP inter-regional project "Co-operation among management development institutions" (INTERMAN) was initiated following the conclusions of a global meeting of institutions which took place in Geneva in December 1980. It became fully operational in 1982.

The project is financially supported by the United Nations Development Programme and executed by the International Labour Office. It benefits in various ways from ILO inputs: professional time for guidance and technical contributions, involvement of regional advisers and field offices, financial contributions to activities, logistic support.

The aim is to enhance the effectiveness of management institutions and their contribution to the development process through professional co-operation. It operates through an informal network of institutions open to all centres, schools, institutes, companies, regional and international organisations professionally concerned with management development. For the time being the only stipulation linked to membership is a periodic supply of information.

Activities can be grouped under four sections: network building, information for co-operation, technical guides and manuals, support to decentralised activities.

1.1 Network building

This is done through a sustained programme of direct contacts with institutions, participation in conferences of major groupings of centres, and liaison meetings between regional and international organisations. Over the past two years (1983 and 1984):

- two consultative meetings between representatives of regional organisations took place in Geneva (African Association of Management, American Assembly of Collegiate Schools of Business, Arab Organisation of Administrative Sciences, Asian Productivity Organisation, Canadian Federation of Deans of Management Studies, European Foundation for Management Development, Latin American Council of Schools of Management). This group was formed in June 1984 as the INTERMAN Consultative Committee.

- the project staff had direct contacts with institutions in the various regions of the world and reviewed INTERMAN activities and perspectives on the occasion of conferences, workshops, committee meetings of the following organisations: African Association of Public Administration and Management (AAPAM), African Training and Research Centre in Administration for Development (CAFRAD), AACSB International Affairs Committee, AOAS, Asian Association of Management Organisations (AAMO), APO Workshop Meeting of Heads of National Productivity Organisations, CLADEA, Co-ordination Council of Management Training Centres in Socialist Countries, EFMD, French Foundation for Management Education (FNEGE), International Association of Schools and Institutes of Administration (IASIA).

- the Geneva-based staff acts as the secretariat for the network and a clearing house for contacts and information.

1.2 Information for co-operation

- MDRS bulletins: published four times a year in English, French and Spanish;

- Worldwide directory of institutions and information sources in management, administration and productivity;

- The INTERMAN information brochure;

- ILO Publications catalogue (four issues per annum);

- The following working documents have been sent or initiated in 1984:
  - Successes and failures in meeting the management challenge: strategies and their implementation (M. Kubr, J. Wallace),
  - Management and leadership style in a management development institution (R. Abramson and M. Kubr),
  - Culture and management development (G. Hofstede),
  - Quel management pour l'Afrique? Rapport du séminaire régional de Bujumbura (Burundi) sur les problèmes de gestion des entreprises publiques,
  - Note technique sur le développement et l'utilisation des moyens pédagogiques dans les institutions africaines: l'expérience de l'Ecole Supérieure de Gestion des Entreprises de Dakar (T. Sylla),
  - Increasing the impact of management development institutions: problems and strategies (M. Kubr),
  - Strategies for strengthening mid-career management training institutions in developing countries (C. Willoughby),
  - Recensement de moyens pédagogiques adaptés à la formation de cadres de gestion des pays d'Afrique francophone (Study initiated by FNEGE and carried out by the Centrale de Cas des Etablissents de langue française with the support of the French Ministry of External Relations),
  - Productivity improvements in developing countries: role of productivity and management institutions (A.N. Saxena - to be forwarded in 1985).

- A series of monographs on the state and perspectives of management education and development are under preparation for the following regions: Asia, Latin America, Western Europe, Socialist countries. Monographs for the other regions will be initiated in 1985;

- Directory of profiles of INTERMAN members (in preparation).

1.3 Guides and manuals

The following guides have been published:

- Managing a management development institution (edited by M. Kubr - 1982),

- La administración de una institución de desarrollo administrativo (Spanish translation of the above-mentioned guide carried out by the Mexican Instituto Nacional de Administración Pública - 1984),

- Case method in management development: guide for effective use (J.I. Reynolds - 1981),

- Méthode des cas et formation au management (translation and adaptation in French of the above mentioned guide, carried out by the Centrale de Cas des Etablissements de langue française, at the initiative and with the support of FNEGE - 1984),

- Management research: guide for institutions and professionals (R. Bennett - 1983),

- Strategic management of development programmes (S. Paul - 1983),

- Management Self-development: a guide for managers, organisations and institutions (T. Boydell - 1984).

The following guides will be published:

- Information and documentation services of management institutions (edited by K. Vernon),

- Improving the performance of public enterprise in developing countries (V. Powell),

- International labour standards and management develoment (A. Gladstone),

- Management development in islands and small states (G.A. Briggs),

- Micro-processors and management development (edited by J. Wallace),

- Management development needs analysis,

- Le management des institutions de formation au management (French translation of "Managing a management development institution"),

- La recherche en management (French translation of the guide "Management research").

1.4 Support to decentralised activities

Activities initiated by member institutions and organisations are supported in various ways by INTERMAN. This support takes the form of sponsorship of resource-persons from other institutions, participation of ILO staff, technical documents, promotion efforts, etc.

Examples of activities having benefited in some way from INTERMAN support are as follows:

1982: . Dublin workshop on the management of management development institutions, organised by the Irish Management Institute;

1983: . Seminar on the management of management centres for Latin American institutions at the ILO Turin Centre, in co-operation with the Belgian Fonds Bekaert;

- Asian workshop for the training of trainers in supervisory development, organised in Colombo by the Sri Lanka National Institute of Business Management and in co-operation with APO;

- EFMD workshop on relationships with developing countries at the ILO headquarters, Geneva;

- Central African seminar on the management of public enterprises organised in Bujumbura by the Burundi Centre de Formation et de Perfectionnement;

1984: . CLADEA conference in Barcelona organised by ESADE, with focus on co-operation between Latin America and Europe;

- Seminar on the management of management centres for Latin American institutions at the ILO Turin Centre, in co-operation with the Belgian Fonds Bekaert;

- Meeting of the Brasilian Association of Graduate Schools of management (ANPAD) organised by the Faculty of Economics and Administration of the University of Sao Paulo, with focus on international co-operation;

- First Latin American meeting of management researchers, organised in Cali by the Faculty of Management of the Universidad del Valle;

- First consultative conference of Permanent/Principal Secretaries and Heads of management institutions of Eastern and Southern Africa, organised in Harare by ESAMI;

planned 1985/86

- Annual conference of the European Foundation for Management Development, organised at the ILO headquarters, with the International Management Institute-Geneva. The INTERMAN Symposium will immediately follow the EFMD conference (May 12-17 1985);

- Colloquium for Portuguese-speaking countries in Sao Tomé on the topic "How to ameliorate the results of enterprises";

- Seminar in French-speaking Western Africa on training materials and inter-institutional exchange;

- Eastern and Western African workshop on the management of management institutions;

- Asian workshop on the management of management development institutions.

2. THE FUTURE

2.1 Basic principles

The aim of both UNDP and ILO is that the project should facilitate the establishment of a formalised world-wide network controlled and supported by participating institutions and organisations themselves. It was agreed that an international professional association would be formed as soon as a sufficient number of institutions have indicated their interest for such an association and their readiness to contribute financially. By 1986, the UNDP and the ILO will have made a substantial financial contribution for the development of INTERMAN. They will then gradually reduce their support. It is expected that participating institutions and organisations will start contributing to the budget and take over the full control of INTERMAN.

It has also been recognised, following the contacts with institutions and taking into account the lessons of two years' experience that:

(a) the continuous development of a strong programme of services to institutions is a condition to obtaining their support;

(b) priority should be given to identifying, organising and implementing concrete joint ventures among institutions (or groups of institutions) and mobilising resources to finance them;

(c) INTERMAN should build as much as possible on existing regional associations and groupings of institutions and should promote the creation of such groupings where they do not exist;

(d) at least part of the developmental costs of INTERMAN and of its services should be covered as from 1986 by a financial contribution from participating institutions and organisations;

(e) given the above-mentioned priorities, a reasonable target date to establish INTERMAN as an autonomous, formal professional association would be 1987 with, if necessary, interim arrangements;

(f) a close link should be maintained with the ILO in order to benefit as much as possible from its technical, administrative and financial support.

In the following section, therefore, we propose a framework for INTERMAN as from 1986 and until it becomes an autonomous body.

2.2 Proposals: INTERMAN as from 1986

(a) Nature and purpose

INTERMAN is a worldwide action-oriented network of management development institutions and organisations.

Its mission is to enhance the effectiveness of institutions and their contribution to the development process, through international professional co-operation (South-South and North-South).

INTERMAN's objectives are:

- to accelerate the pace of innovation and the development of collaborative actions among institutions through an exchange of information at the international level;
- to facilitate or strengthen networks of institutions at the regional and inter-regional levels and to foster their co-operation;
- to contribute to institution-building through co-operative activities;
- to help identify concrete joint ventures among institutions and/or groups of institutions and regional organisations;
- to mobilise resources to support joint ventures.

(b) Services offered

Institutions participating in INTERMAN will benefit from the following services:

- a bi-monthly newsletter "INTERMAN FLASH" which would serve as a short and crisp vehicle of communication with members. The first issues of this new letter will appear in 1985;
- the MDRS bulletin, published four times a year, would continue to focus on the demand and supply sides of co-operation with growing emphasis on innovations and new developments;
- an annual list of profiles of institutions;
- two or three times a year (depending on funding), methodological guides and manuals of the kind already initiated by INTERMAN (see page 3 (1.3);
- four or five working documents and monographs a year on specific issues to foster co-operation (examples of such documents are given on page 2 (1.2).

In addition to these regular services, members will be entitled, on an ad hoc basis to benefit from the following opportunities:

- participate as resource persons in decentralised activities supported by INTERMAN (see examples page 3 (1.4);
- contribute as experts to joint ventures financially supported by funding bodies;
- host conferences, seminars and workshops, undertaken in the framework of and supported by INTERMAN;
- be considered as candidates for the rosters of experts available for international technical co-operation projects, and kept up to date by INTERMAN in collaboration with the ILO Management Development Branch;
- use the data base on innovations being developed by INTERMAN.

(c) Finance

- participating institutions and organisations would be asked for an annual contribution of US$ 500, representing a partial support to the full cost of the development of INTERMAN and of its services;

- individuals wishing to receive regularly the INTERMAN newsletter and the MDRS bulletin would be asked to pay a contribution of US$ 50;

- other sources of finance will be: (a) the UNDP and the ILO support and (b) joint ventures and activities financed by other funding bodies.

(d) Structure

- INTERMAN will continue to be a programme attached to the ILO Management Development Branch until an autononous professional association is constituted;

- the consultative committee will be enlarged to include institutions and/or regional organisations not involved until now.

JFP/LG
February 1985

ANNEX II

INTERMAN SYMPOSIUM

16-17 May 1985, Geneva

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MDRS BULLETIN BOLETIN

No 13, 1985

Management Development Referral Service

ENGLISH VERSION

ANNEX III

CONTENTS

Bulletin of the ILO/UNDP Inter-regional Project
"Co-operation among Management Development Institutions" (INTERMAN)

Published by the Management Development Branch of the International Labour Office, CH-1211 Geneva 22, Switzerland

THE WORLD BANK / INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

DATE May 21, 1985

TO Mr. Ernest Stern, Senior Vice President, Operations

Thru: Mr. S. S. Husain, Vice President, Operations Policy

FROM Nimrod Raphaeli, Adviser, UN/UNDP Program and Project Operations

EXTENSION 76955

SUBJECT Meetings with Specialized Agencies

1. Following his lecture before the European Foundation for Management Development on May 15 in Geneva, Mr. Husain was invited to meet with Mr. Blanchard and Dr. Mahler, the Directors General of ILO and WHO, respectively.

ILO

2. Mr. Blanchard dwelt on the meeting which he organized in Washington on April 20 between the Executive Board of the International Confederation of Free Trade Unions (ICFTU) and Messrs. Clausen and de Larosiere. Although the trade unionists were critical of the adjustment policies, the meeting was a "breakthrough." To the best of Mr. Blanchard's knowledge, this was a first meeting between a President of the Bank and the ICFTU.

3. ILO is organizing a high-level meeting in the second half of 1986 involving senior representatives of employees, workers and governments. The main purpose of the meeting would be to focus on the longer-term issues of adjustment, particularly employment and income. ILO will be sending the Bank, in a few weeks, additional information about timing and themes. Otherwise, operational relations between the Bank and ILO are satisfactory to both sides.

WHO

4. Dr. Mahler and Mr. Husain discussed the possibilities of Bank-WHO collaboration in family planning, particularly in Africa. Dr. Mahler emphasized that the Bank's policy on family planning offers "a bargaining chip" with many governments and that WHO was prepared to do the monitoring of the operational output of such policies. WHO can also prepare the ground for Bank operations in many countries in Africa, and Dr. Mahler was enthusiastic about the abilities of the new WHO Director in that region, Mr. Monikoso, from the Cameroon.

5. It was agreed that WHO will select 2-3 countries for special effort in family planning, and that the Bank will accord them the highest operational priority. Dr. Mahler thought WHO will not, however, make the selection of the countries until it has developed criteria for estimating their political commitment. Mr. North will be asked to follow up.

UNIDO

6. I was at UNIDO on May 16-17 to discuss possible areas of collaboration. It became quickly evident to me, and I dare say to UNIDO, that paradoxically, the cooperative program with UNIDO is a serious impediment to collaboration. The Bank is currently supporting the program with a grant of $190,000 per annum which represents 75% of the salaries of the Director and Deputy Director of the program and their two secretaries. Unfortunately, they manage a non-program, and the situation is not likely to change until a new agreement is reached with UNIDO. The timing for such agreement may soon become propitious.

7. A large majority of countries have ratified last week an agreement converting UNIDO into a Specialized Agency. The conversion will take place as soon as the Secretary General of the UN will convene a meeting for electing a director-general for the new agency and for approving its constitution. It is assumed that this will take place no later than January 1, 1986. A number of candidates have been nominated for the position.

8. In consultation with Industry and International Relations Departments, we shall submit for your consideration a set of recommendations on the status of the cooperative program with UNIDO by the next mid-year budget and program reviews. Basically, a new agreement with UNIDO should be based on a reimbursable arrangement.

cc: Messrs. V. Rajagopalan, PPDDR
S. Burki, IRDDR
J. North, PHNDR paras. 4-5
J. Dherse, EISVP paras. 6-8
A. Golan, INDDR paras. 6-8
H. Kohli, INDDR paras. 6-8

NRaphaeli:vcc

THE WORLD BANK / INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

DATE May 28, 1985

TO Mr. Robert Townsend, Chief, Security Division

FROM Nimrod Raphaeli, Adviser, UN/UNDP Program and Project Operations

EXTENSION 76955

SUBJECT Mr. William H. Bartsch

Mr. Bartsch, Senior Liason Officer with the Bank at the International Labour Organization, Washington Office holds an annual pass to the Bank, which expires on June 14. I would appreciate it if you would kindly renew it.

cc: Mr. Bartsch, ILO

P-1866

TENTH IAPWG MEETING

Utrecht, 15-16 April 1985

Agenda Item 11

(Introduced by the ILO)

DEFINITION OF LIABILITY AND OWNERSHIP FOR EQUIPMENT AND RELATED SERVICES PROCURED BY THE ILO FOR TECHNICAL CO-OPERATION PROJECTS FROM REGULAR BUDGET FUNDS AND OTHER RESOURCES

PART I

1. Introduction and scope

1.1 In recent years the ILO has been increasingly involved in the procurement of equipment and related services for projects financed by development banks, particularly the International Development Association (IDA) of the World Bank. We are at present in the process of procuring equipment for a total of $27 million for four of these projects. At the same time, we are procuring equipment for an annual total of $10 to 15 million for approximately 400 projects financed from multi-lateral, multi-bilateral and from our own regular budget resources.

1.2 Two of the IDA-financed projects described above have equipment allocations of $7.8 and $11.4 million respectively. This high value of equipment allocations raises more than ever the question as to who is liable for loss or damage which may occur in the procurement process. Is it the provider of the funds (i.e. IDA), the executing agency (i.e. ILO) or the recipient country (i.e. the borrower) ? Who is ultimately liable for meeting claims in this respect ? Are there shared liabilities ? What is the liability position in the case of UNDP-financed projects (multi-lateral funds) for the UNDP itself, the executing agency and/or the recipient country ? Similarly, how is liability defined in projects financed by development agencies such as DANIDA, SIDA, etc. or individual government trust funds ? What is the liability position between the purchaser and the seller of the equipment ?

1.3 Closely linked to "liability" is "ownership of the equipment" at the various stages of the project cycle. Part of this paper is devoted to an attempt to throw some light on the term "ownership" and its implications in the project's procurement process.

1.4 We have tried in this paper to write-up our experience, current knowledge and understanding of the subject matters of "liability" and "ownership" in order to stimulate a dialogue among the members of IAPWG. We consider that such a dialogue will help us to have a better understanding of the issues of "liability" and "ownership" in agreements and contracts concluded between the different parties.

1.5 To review the concepts of "liability" and "ownership" is also a preventive measure in order to be better prepared in the course of disputes which may arise in the procurement process. At any rate we, in the ILO felt it would be worthwile for UN organisations to think about the problem of who might be liable and for what, and who might cover inherent risks by insurance or other means.

PART II

2. Inter-relation of types of funds and liability in the procurement process

2.1 When the ILO implements projects financed from multi-lateral and multi-bilateral funds or from its own regular budget, the Office can be liable to its constituents for financial losses sustained in the procurement process. In compliance with the Financial Rules, losses which cannot be recovered from insurances or by other means may be written off following close investigation, but of course the amounts written off must be charged to some budget provision. In certain cases, part of the cost may even have to be borne by the officials involved. ILO's Financial Rule 11.40 reads:

"11.40 Treatment of Cases of Loss of Assets. Fraud or Unrecovered Debt

(a) The Treasurer may authorise minor losses of cash, stores or other assets not exceeding the equivalent of US$250 in each case to be written off if in his judgment the cost of recuperating the loss would exceed the amount to be written off, or if it is very unlikely that action to recuperate the loss would be successful.

(b) For all other cases, the Director-General shall appoint a Property Survey Committee, which after full investigation of each case, may authorise losses of cash, stores or other assets to be written off.

(c) The Treasurer or the Property Survey Committee, as the case may be, shall fix the responsibility for the loss, if any, attaching to any official of the ILO. Such official may be required to reimburse the loss either partially or in full, irrespective of whether the loss is covered by insurance or not. (1)

(d) Any case of fraud, presumptive fraud or attempted fraud must be reported to the Director-General through the Treasurer.

(e) The Treasurer may authorise the writing-off of bad debts if in his judgment the cost of recovering the debt would exceed the amount to be written off or if it is very unlikely that action to recover the debt would be successful. A statement of all bad debts of over $250 which are written off shall be submitted to the External Auditor with the related accounts.

(f) Amounts written off and subsequently recovered after the close of the financial period in which the writing-off occurred shall be treated as miscellaneous income."

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(1) Underlining provided.

This shows that there can be a risk not only for the Office (1) to become liable to its constituents, but also for ILO officials to become liable to the Office.

2.2 At least in theory, multi-lateral funds entrusted by a UN organisation (e.g. UNDP, UNHCR) to the ILO for the implementation of technical co-operation projects could also entail a liability of the ILO towards the UN organisation to make good any substantial loss or damage caused in the implementation of projects. However, this is a somewhat academic question since we are not aware of a single precedent in this respect.

2.3 Multi-bilateral funds entrusted by donor agencies (e.g. SIDA, DANIDA, etc. or other donors) to the ILO for the implementation of projects could equally entail liability by the ILO towards the donor or possibly the recipient country for loss or damage caused in the implementation of projects.

2.4 Credits or loans which are made available to developing countries (borrowers) by development banks for the implementation of technical co-operation projects can also be considered to be analogous to multi-lateral funds and may entail similar liabilities for the ILO.

2.4.1 If the ILO implements projects financed by development banks, it follows the "Guidelines for Procurement" of the respective development bank and the "Special Conditions of the Credit or Loan Agreement". These guidelines are identical to those of the ILO apart from certain financial aspects. The funds for the equipment to be bought are not transferred to the ILO; they remain with the development bank at the disposal of the borrower. Upon certification of the suppliers' and forwarders' invoices by the ILO. the development bank effects the payment to the suppliers and forwarders. The procurement guidelines very effectively protect the contractual parties' (buyer (2) and seller) interests and those of the development bank. However, no reference is made in these procurement guidelines to the degree of liability attaching to UN organisations when borrower governments procure through them. The possibility for borrower governments to procure through UN organisations is stipulated in Article 3.7 (Procurement by UN agencies) of the World Bank's "Guidelines for Procurement under IBRD Loans and IDA Credits":

> "There may be situations in which procurement through ILO, UNICEF, WHO or one of the other specialized agencies of the UN may be the most economical and efficient way of procuring goods and equipment, primarily in the fields of education, health and rural water supply and sanitation. In such cases, procurement is carried out in accordance with the procedures of the particular agency involved."

2.4.2 If the ILO becomes involved in such projects, a procurement service agreement is signed between the ILO and the borrower. This document is similar to a Plan of Operation under UNDP-financed or multi-bi projects.

2.4.3 In the procurement service agreement, which requires the development bank's endorsement but is not signed by them, the borrower is defined as the purchaser and the ILO as the purchaser's representative.

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(1) The Office being the secretariat of the International Labour Organisation.

(2) In this case buyer means borrowing government.

3. The ILO as "agent" in the procurement process and consequential liabilities

3.1 Under a typical procurement service agreement concluded between the ILO and borrowers for projects financed by development banks, the ILO findo itself in the position of an agent.

3.2 To a certain extent, the position of the ILO in the context of UNDP or multi-bi financed projects is similar to that of an agent. In general terms, the principal of the agent is the entity which pays. This can be UNDP, a development agency, or a recipient government. As described in the following paragraphs this agent/principal relationship could mean for the ILO that any rights or obligations deriving from its acts as a procurement agent ultimately become the rights or obligations of the principal who pays for the goods.

3.3 If one accepts that the role of the ILO is comparable to that of an agent, the following definition is of interest in the context of potential liability questions: "An Agent has the duty to act honestly in the interest of its principal, to conform to his instructions and to exercise such a degree of care and skill as is reasonable in the circumstances of the agency". (Chitty on Contracts, Volume 2, page 34). When the agent is acting for reward, he "must exhibit such a degree of skill and diligence as is appropriate to the performance of the duties he has accepted. But he is not responsible to his principal for a mere mistake or error in judgement, not amounting to a failure to exercise proper care and skill ... The mere fact that by a different course of action he might have averted a loss sustained by his principal is no evidence of such a failure" (Ibid. page 36).

3.4 If one follows the quotations above, it would seem that the relative gravity of a mistake, error in judgement, misconduct or failure in the exercise of proper care and skill determines the liability of the agent (i.e. ILO) for any loss or damage sustained by the principal (provider of funds).

3.5 In order to assess the agent's and the principal's respective shares of liability in the case of a significant failure caused by the agent, it becomes necessary to determine the degree of negligence or misconduct that has taken place. This might be a knotty issue.

3.6 In serious cases of negligence, mistakes, errors in judgements, etc. the agent could be held liable to make good any loss or damage. Since the ILO is not self-insured for these risks we are thinking about taking insurance to meet any pertinent claims.

3.7 Within the UN system, so far, nobody seems to have taken another agency to task for failures or losses occuring in the normal conduct of business.

3.8 Under the UNDP, developing countries could pretend that they have an entitlement to the fund's programme. These countries would then become the "payer". Under this prospective, the UN organisations would find themselves again in a kind of agent role when they become involved in the procurement process. The ILO takes the view that although it is accountable for its acts in the implementation of such projects, the ultimate liability for losses or damages that might be caused by the ILO in the normal conduct of its business rests with the recipient governments.

4. Liabilities attaching to the ILO, Suppliers/Contractors and Recipient Countries in the procurement process

4.1 Commercial contracts (i.e. contract of sale, purchase order) contain the standard obligations and responsibilities of the supplier/contractor and the ILO. Any dispute arising in the execution of a contract of sale or purchase order, which cannot be settled amicably between the contractual parties, is referred to arbitration under the pertinent clause of the contract of sale or purchase order. The Arbitration Rules of the United Nations Commission on International Trade Law (UNCITRAL) are used in commercial contracts established by the ILO.

4.2 In cases where the ILO acts as a procurement agent, there are two distinct contractual relationships - the first between the supplier/contractor and the ILO, the second between the holder or provider of funds (essentially he who pays) and the ILO. The determination of responsibilities and resulting liabilities depends of course in the first instance on the respective obligations and responsibilities fixed for each party in the respective agreements and contracts.

4.3 We in the ILO are recognising increasingly that we must pay a great deal of attention to the intricate legal relationships between all parties involved in the procurement process for technical co-operation projects, particularly those financed by development banks. For donors or borrowing governments it is equally important to know that they may become liable or have to bear the cost of loss or damage under contracts of sale or purchase orders awarded or placed by the ILO as the procurement agent. But of course others might also wish to start thinking about these issues. It could well be that donor institutions or borrower governments have not yet given much thoughts to the costs that they might be asked to absorb one day. And then there might not necessarily be full or easy agreement on the statements quoted in para. 3.2 above from the "Chitty on Contracts".

5. Liability insurance

5.1 Given the likely legal arguments that might arise if a major loss occurred, it may be advisable to consider taking out adequate liability insurance. There are different insurances or insurance combinations to provide against risks leading to liabilities. At present the ILO has no liability insurance covering these risks. We are therefore very interested in the experience and views of other UN organisations in this matter.

PART III

6. Ownership and proprietary rights to equipment at different implementation stages of technical co-operation projects

6.1 It has occurred to us that a consideration of liability cannot lead to valid conclusions without taking into account the whole complex of shifts in ownership. We have attempted below to set out what we know and think about this subject.

6.2 The ILO is the owner of equipment procured from its regular budget for technical co-operation, from the moment the equipment has been accepted and payment has been made by the ILO to the supplier/contractor.

6.3 Equipment procured by the ILO for projects funded by UNDP is owned by UNDP from the moment the equipment is delivered by the supplier/contractor, and accepted and paid for by the ILO, until disposal action is taken at the end of a technical co-operation project. During this period the ILO takes care of the equipment on behalf of and on account of UNDP. The supplier/contractor remains the owner of the equipment regardless of the location until acceptance and payment of invoices has been effected by trhe ILO.

6.4 According to standard ILO project agreements, equipment procured by the ILO for projects financed from credit or loan funds, multi-bilateral or government trust funds, normally becomes the property of the recipient government from the time the ILO has accepted the items and paid the suppliers/contractors' invoices. Again, the supplier/contractor remains the owner of the equipment regardless of the location until acceptance and payment of invoices has been effected by the ILO.

6.5 Irrespective of the source of funds involved, the ILO is normally considered by suppliers/contractors as a trustworthy partner and receives the equipment without the establishment of letters of credit. As proof of delivery the supplier/contractor receives from ILO's forwarding agent a Forwarder's Certificate of Receipt (FCR). From the moment of establishment of the bill of lading or airwaybill, the proprietary rights are vested in the consignee (1), provided payment of the suppliers/contractors' invoices has been made by the ILO. If the equipment has been delivered to the consignee, but payment of the suppliers/contractors' invoices has not been made prior to delivery, the consignee is in possession of the equipment, but he is not its owner. The owner is still the supplier/contractor.

6.6 In order to ensure that the equipment is acceptable to the ultimate owner, the ILO obtains his approval of the specifications and descriptions of equipment items and related services prior to the issue of invitations to tender. For projects financed by development banks we also obtain the government's approval of the bidding documents and evaluation reports prior to the award of contracts to suppliers/contractors.

6.7 Ownership normally requires the owner to be responsible for all costs arising from operation, repair, maintenance, etc. of equipment procured. However, as in the case of liabilities, it is advisable to define in procurement service agreements and commercial contracts, the state of ownership of the contractual partners, the transfer of proprietary rights, the provisions relating to inspection, installation, commissioning, warranties, insurance, performance bonds, etc. which may influence the definition of ownership. We in the ILO are just beginning to write these matters into our agreements.

6.8 Ownership may involve an awareness of the obligation to take out insurance to cover the owner's and the project's liabilities unless "self-insurance" is preferred.

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(1) Consignee means the Resident Representative of UNDP for projects funded by UNDP, and the recipient government for projects funded by other bodies.

Part IV

7. Conclusions

7.1 We have seen that in the context of procurement of equipment and related services for technical co-operation projects the subject areas "liability" and "ownership" comprise many potentially complex and knotty legal issues.

7.2 It would also appear that the attribution of risks and liabilities, responsibilities, the passing of proprietary rights, ownership, etc. in the various implementation phases of projects depend to a large extent on the different types of funds used and the obligations and terms stipulated in procurement service agreements and commercial contracts.

7.3 We have also noted the special issues arising when executing agencies become purchasing agents for third parties.

7.4 Obviously human errors and other pitfalls are a permanent risk in the procurement process. Awareness of these risks already gives some protection. Insurance can provide further and perhaps better protection against many types of financial losses; but even that may not be enough to avoid physical or moral damage caused in particular instances. Moreover, one cannot afford to buy insurance against all risks. We in the ILO have not yet made up our minds completely as to whether the ILO should take out liability insurance, e.g. professional liability insurance, third-party liability insurance, all-risks liability insurance, etc.

7.5 As we have not yet progressed very far in this area, we would welcome any contributions that our sister agencies can make in discussing this ILO paper. In this context, IAPWG may wish to consider whether IAPSU should undertake a more thorough study of the liability and ownership issues. The end product of such a study might be a set of recommendations comprising:

(a) a clear definition of the degree of liabilities and ownership attaching to UN organisations and their different partners in procurement process, having due regard to the type of funds used;

(b) an analysis of the most common risks leading to liabilities that could cause the UN organisations substantial financial loss or damage;

(c) proposed criteria making it easier for UN organisations to decide under what conditions it would be advantageous to take out particular types of liability insurance;

(d) some clarification of the agent/principal roles of UN organisations;

(e) appropriate legal texts for inclusion in procurement service agreements and in contracts of sale or purchase orders.

7.6 It would seem that the issues raised in this paper affect the work of all UN organisations engaged in the procurement of equipment and related services for technical co-operation projects. It would be nice if other agencies could actively participate in the suggested review of this matter by IAPSU. The ILO for its part will be pleased to contribute further to this subject.

The World Bank
INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
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May 23, 1985

Mr. Franz von Mutius
Assistant Director General
International Labour Organization
4, route des Morillons
CH-1211 Geneva 22
Switzerland

Dear Franz:

I am truly sorry that due to circumstances beyond my control, I was unable to stop at your office during my recent visit to ILO with Mr. Husain.

As you know, I intend to come again with a Legal Counsel in September to discuss a model standard letter of agreement between the Agencies and Bank borrowers. We have already reached an agreement with the UN Legal Department on a model agreement which, with some modifications, can be easily applied elsewhere.

Again, my apologies coupled with warm personal regards.

Sincerely,

Nimrod Raphaeli

Nimrod Raphaeli
Adviser, UN/UNDP Operations

May 21, 1985

Mr. S. K. Jain
Deputy Director General
International Labour Organization
4, route des Morillons
CH-1211 Geneva 22
Switzerland

Dear Mr. Jain:

I just wanted to let you know how much I appreciated your hospitality and the opportunity to address your senior staff on issues of concern to both our institutions. The operational relations between ILO and the Bank appear to be in good shape, and we shall continue our efforts to strengthen them.

Please convey my deep appreciation to Mr. Blanchard for kindly agreeing to receive us at a short notice.

With kind regards.

Yours sincerely,

S. Shahid Husain
Vice President
Operations Policy

NRaphaeli:vcc

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Shrivastava

Todd

The challenge of management in developing countries

S. K. Jain
Deputy Director General, ILO

Mr. Chairman, Ladies and Gentlemen, it is an honour and a great pleasure for us in the ILO to host your 1985 annual conference and to welcome you here. You have gathered to discuss a topic that is particularly close to our heart. We are deeply concerned about the problems faced by managers in the world of today and are especially interested in initiatives and approaches that might help developing countries to meet the management challenge that stares them in the face. Over the years Europe has done much in sharing its management know-how with other countries and it is good that you should be wanting to take a fresh look at what more could be done. It is significant that the developing countries themselves are well represented at this congress.

You might well ask why the ILO is so concerned about management. There are two main reasons. Firstly, we believe that effective and efficient management is the sine qua non condition for balanced economic and social development, including expanding employment, higher incomes and equity. Secondly, it is only through enlightened and innovative management that the quality of working life can be improved.

The fact is that the ILO has had a long association with the international management movement. As far back as in 1926 our Organisation participated in the establishment of the International Council of Scientific Management (the CIOS), and in 1927 the first International Institute of Management was founded in Geneva with ILO's support, and had its office in the ILO building.

Management and productivity came to the fore soon after the war and in the 1950s our Organisation launched, with the support of the UN Special Fund and UNDP, a fully fledged management development and productivity improvement programme which spread quickly to many developing countries. Since that time several hundred field projects have been carried out. Indeed there are a few developing countries with which the ILO has not yet worked in management training, consultancy, institution building and similar endeavours. With its tripartite structure where representatives of employers and workers participate fully and equally with governments in decision making and operations, the ILO is particularly will equipped to act because we can view management problems from several angles, and seek solutions regarded as feasible and acceptable by the three key partners in economic and social development.

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Never before was there greater awareness in the developing countries of the critical importance of management. And yet the management gap between developed and developing countries is great. Is it widening or narrowing? This is difficult to say but I do suspect that the management challenge will remain with us until the end of this century and for many more years to come. Altogether the picture is a rather complex one and not easy to grasp.

Of course, there are numerous examples of individual managers, organisations and in some cases even whole countries which demonstrate that effective management in the developing world is not a fiction. These cases are often referred to, but the conditions and the causes of achievement are seldom analysed. For example, we need to know a great deal more about the respective roles and the inter-action of talented individuals who take entrepreneurial initiative or assume managerial responsibilities. We also need to know a good deal more of the environment in which these talents emerge and succeed.

It has been said many times that the management gap is above all a problem of people. More education and training are usually recommended as a remedy. Indeed, a developing country manager who has received good education is equipped with knowledge that may be very useful in tackling practical problems. Also, education and training do increase awareness of what could be done differently, and what management standards are necessary in order to attain certain economic results. Yet we have seen too many educated managers who are unable to apply, or would not dare to apply, what they have learned. There are wider and more profound problems which hamper development in many countries and whose impact on management effectiveness is as strong, if not stronger, as that of managerial competence. I am referring ,for example, to the level of general and technical education, to social traditions, values and bonds, to living and working habits, or to the distribution of power in society. These factors, among others, deeply affect management, and determine whether the local environment will be favourable, neutral, or hostile to efforts for making organisations more effective.

We are now taking a deeper and a more comprehensive view of what management is in developing countries, and of the conditions in which management can advance to higher effectiveness and efficiency. In fact, an important change seems to be occuring in the very concept of "management". Certainly this concept has evolved over the last thirty years. When Peter Drucker published "The practice of management" in 1955, he wrote "Management as such is the management of a business enterprise", and underlined the word business. Similarly, early technical assistance to the developing countries tended to focus first of all on improving the management of individual undertakings, private or public, in particular of the newly established firms in manufacturing, commerce and public utilities Increasingly it was discovered that such an approach risked to be too narrow. In 1985 we therefore speak about the "management of development", which does include the management of individual undertakings, but which embraces much more than that. You certainly understand what I have in mind. We now speak about national economic management, management of development programmes, energy and environmental management, foreign debt management (which is probably the newest "management discipline", if I may use this term), and so on.

Newer and newer aspects of economic and social development tend to be regarded as areas that require management. How far will this reach? It would be too daring to attempt to answer this question. Only experience will show what should be managed and coordinated and what not, and how this should be done. There are, of course, two risks: undermanagement and overmanagement.

Undermanagement in relation to major national issues of development could be highly damaging. Examples can be found in such major areas as deforestration, desertification, fast deterioration of the physical environment, alarming urban growth, not to speak about the population explosion.

Overmanagement can also be very damaging. This happens if a government decides to control what does not need or even should not be controlled. The intention may be noble but it is the final effect that counts - for example, stagnating or dropping agricultural production due to unrealistically low prices. Or, the local small building, maintenance and other service sectors being paralysed due to excessive regulation or legislation that discriminate against small enterprises and stifle individual initiative.

Although it may sound paradoxical, many developing countries suffer from undermanagement and overmanagement simultaneously. On the one hand, substantial natural and human resources are not tapped, or are wasted, due to lack of appropriate policy orientation and motivation. On the other hand, thousands of civil servants, including the top echelons, are occupied by small details and cumbersome procedures in order to enforce regulations that are not needed, or are even causing a great deal of harm.

A developing country, perhaps even more than a developed country, needs the right dose of management and dynamism, in all sectors of economic and social life. This is a critical aspect of balanced national development. No country can hope to develop in the long run by favouring just one or two sectors, and concentrating its scarce management talent on a few modern enterprises, while neglecting the bulk of the economy.

This dichotomy between modern and traditional economy is already a serious impediment of development in many countries. It is a hopeless effort to aim to increase exports by being more competitive in manufacturing, only to be able to pay for increased food imports, when the additional food requirements could be satisfied by local agriculture - if properly managed. And by proper management I have in mind, in the spirit of what I said before, not only a more efficient operation of individual farms, but the whole policy and institutional framework of the rural sector, including price policy, taxation, distribution channels, availability and cost of finance and material inputs, training and advisory services, appropriate use of food aid, and so on.

When speaking about management in developing countries, and about the need to have competent management in all economic and social sectors, we should not create the impression that everything could be solved by introducing more sophisticated management systems, and staffing them by trained managers. It has been said many times that development is above all a change in mentality, values and behaviour. Management can facilitate and stimulate such a change, but people will change only by taking initiative, engaging in action and learning from experience. We all know that countries such as the United States or Great Britain are now looking for ways likely to encourage entrepreneurial initiative even within large corporations, whose complex management structures and systems have often stifled the individual manager's and employee's initiative. Although there is a widespread innate sense of initiative among many people in the Third World, the lack of enterprise remains a critical issue in many countries. We often witness paradoxical situations. Instead of taking care of their needs using available local resources, many people just wait for the government to step in and take care of their needs.

There is no way in which governments could take care of all people's needs. They can only create a physical infrastructure and a favourable environment in which development can take place. A critical need is to encourage individual initiative, and help people to create small businesses in urban and rural areas and organise co-operatives and self-help groups for dealing collectively with various problems facing the community. Of course, entrepreneurial initiative, and self-help at community level need development support, and the availability of various services, economic, technical and social. Whether these services are provided by the government or the private sector, they require management in order to be effective and reach the client. Here the developing countries struggle with another problem. The scarce management talents, whose origin is mostly in urban elites, tend to converge to the modern business sector and to government service, and avoid rural areas and the social development programmes that enjoy little prestige and pay low salaries for difficult work. Thus, sectors such as primary health, nutrition, population control, basic education and community development tend to be rather poorly managed. It may be difficult to reorient and motivate the young manager who has become used to modern urban life, to move to a village. Many more managers, as well as new businessmen in rural areas, should therefore come from the ranks of the poor, with whom they have grown up, whose culture they understand and with whom they can identify. This is a major challenge.

Another challenge is that of time . The magnitude of the problems and their urgency is such that time is of the essence in the tasks of development. How can management face up to this? Where the starting level of a development process is reasonably high, it is possible to discuss a strategy for mastering management and administrative skills and achieving higher economic performance, over ten, twenty, or thirty years - which, by the way, is a much shorter time than it took the developed countries to attain their present management standards. This thinking may be acceptable in organisations in the modern sector. However, management must be improved in a much shorter time-span in activities aimed at the rapid improvement of living conditions of the people who live below the level of absolute poverty.

In addition, emergencies have become endemic in many developing countries and disaster relief has tended to use up a great deal of energy and talent that should normally be available for planned development - these emergencies include not only the current drought in Africa but also floods, earthquakes, epidemies and the other crises which occur again and again in all developing regions. Thus, disaster relief management is another area which has become increasingly important to developing countries, although all of us would have preferred if at least the same resources that are spent on disaster relief could have been aplied to disaster prevention.

There are further factors that affect the management challenge in the third world in a rather complex manner. Technology is one of them. There is no doubt that new technologies can simplify the managers' tasks in developing countries in many ways. For example, a wide range of efficient computing, control, record keeping, communication, reproduction and other equipment is available today for prices that even a poor country and a smaller business can afford to pay. More and more organisations are taking advantage of this progress in their efforts to streamline administrative and managerial operations.

However, most of the new office technology, as indeed manufacturing technology itself, has to be imported from the industrialised countries. Even technologies adapted for use in developing countries have been developed outside these countries in most cases. What happens is that a piece of efficient equipment is acquired, but the know-how that led to its design and manufacturing is not acquired. Often even maintenance and servicing cannot be done with local resources. The technological know-how is not internalised and the technological dependence on the developed countries increases instead of being reduced. The technological gap widens and with it the management gap as well. For managers in developing countries technology raises many fundamental issues. For instance how to choose technologies in production which are sound not only from the standpoint of enterprise profitability but also from broader considerations of national employment policy, skill availability and development, environmental protection, and so on?

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I have spoken about a few of the critical issues faced by management in the developing world: the need for management to embrace all sectors of the economy; the overwhelming urgency of action; the need for innovation; the importance of fostering initiative and enterprise; the impact of technology; the need for management cadres not to be drawn only from urban elites; and so forth. You certainly understand that I have not tried to draw an exhaustive picture, but to underline problems and trends which, in my judgement, deserve particular attention at the present time.

Let me now look at these problems from a different angle. This conference is about developing management, with a focus on co-operation between Europe and the developing countries. Allow me, therefore, to address a few suggestions to management educators and developers, as well as to business and other organisations which want to achieve higher management development standards in developing countries.

First of all, let me comment on the role of management development institutions in developing countries, and of those institutions in the industrialised countries that want to render a better service to the developing countries. So far this role has been rather narrow - mainly running courses on management techniques and systems and doing a consulting assignment from time to time. There has been little research into the real issues faced by the developing countries and the contribution of this research to improving management education and practice seems to have been rather small. Yet management institutions employ many talented people, including graduates of the best universities. This brainpower could be used for dealing with critical development issues. If we accept that management practice reflects a complex mix of economic, social, ethnic, cultural, technological and other factors, management institutions can be expected to deal with these inter-linkages and with the total management environment, as well as to teach effective management techniques and systems.

To consider how management can speed up the development and increase the efficiency of social development and traditional economic sectors is particularly urgent. Some institutions have tried this, but have received little support and response. Most institutions continue to do what the educated managers do - sticking to the modern sectors. May I suggest that a management institution should feel deeply concerned with the overall problems of national development, and management and administration in its country. Business and government circles would do well to recognise the legitimacy of such concerns on the part of the management institution.

This brings me to the second issue, namely to the need to strengthen the links between management institutes and their business and government clients. A lot of lip service is paid to these links. In practice only a few institutions have achieved close and productive linkages with clients. Most institutions run their scheduled programmes without worrying sufficiently as to whether these programmes continue to relate to their clients' priority problems. There are many ways to develop the links between an institution and its client base. This includes the clients' active participation in the management of the institution, consulting assignments, in-plant and in-service training, management research, using practitioners as teachers, and many others.

The fault is not always on the side of the institution. If business circles are keen to have better managers, they should consider how to influence and support management schools, centres, and other institutions. Quite a few important business companies are known for their constructive contribution in this area. Their interest is documented, for example, by their attendance at this conference and their long-term involvement in the activities of the European Foundation for Management Development. But more can be done, in the developing countries in particular. Many national and international business houses could do more for helping local institutions to upgrade their training and consulting services.

Thirdly, co-operation among management institutions within the developing countries and regions needs to be enhanced. There are several reasons for this. One is the current fragmentation of institution-building efforts. There are far too many institutions with small and inexperienced staff that cannot hope to be regarded by business as important partners, or do anything else than running routine management seminars. Since all institutions cannot grow to attain a critical mass of professional staff, close co-operation arrangements can contribute to effectiveness. Another reason is the need to learn from other people's experience. There is new, genuine and authentic experience in the developing countries. The study and dissemination of this experience is quite insufficient, and this is due not only to the shortage of research, as I have already mentioned, but also to poor communication and collaboration between management centres, schools and associations from different countries.

Many of you come from excellent management institutions from throughout the world. While you face problems such as attracting and retaining good faculty, and marketing and delivering quality programmes, I am sure you also have stories to tell from which others can learn. Take the trouble, think of your own experiences that may interest others, and find ways of telling others about these experiences!

North-South co-operation in management development need not always be a one way street running southward. Institutions from industrialised countries which have been active in this co-operation are already telling us how much they have learned from their partners in the developing world. Not necessarily specific management techniques, but human and cultural values, social concerns, modesty, patience and a more tolerant and realistic attitude to the world that surrounds them. Indeed, these are all important management qualities. I would therefore like to express the hope that experience will increasingly flow in both directions, enriching the partners both in the South and in the North.

In the short-run, there is scope for many practical improvements in North-South co-operation. Assistance in management, and in the development of managers, is too fragmented, if not hap-hazzard, and often lacks policy orientation. Many agencies are involved with little projects, without knowing what others have done or plan to do, without worrying about overlapping and a lack of co-ordination. Some national and private agencies aim at transferring the donor's own model and, for this reason, would not consider a joint project in which a neutral model would be applied, and the identity of the individual donors blurred. Perhaps the developing countries themselves could be more selective, and harmonise the content of assistance received from various sources. But better co-ordination must also come from the donor community, including not only the financing agencies, but also the technical agencies and institutions involved in the design and execution of projects. In this connection, a special plea has to be made for co-ordinated management assistance to the least developed countries of Africa.

In the ILO we have been contributing to greater international co-operation in management development, and helping management institutions in all regions to know each other better, exchange information and tackle issues of common interest collectively, using various forms of co-operation. This is the purpose of the INTERMAN project, in which many institutions attending this conference participate, and for which we have received important support from the United Nations Development Programme. We do hope that INTERMAN can provide the basis for a permanent world-wide system of co-operation, controlled and supported by the participating institutions and organisations themselves. We hope, too, that European management institutions and EFMD as a body will continue to play a major role in this effort.

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I have come to the end of my talk. In making comments on how developing countries manage, or sometimes fail to manage, my objective has been to point not to achievements of which there are indeed many but to problems, including some which seem to have received little attention. We should try to understand these problems better, and develop a common understanding of the problems, in order to be more efficient in action. I am confident that this conference will make a significant contribution to this effort. Let me wish you full success in your deliberations.

13.5.1985

Mr. Husain

ILO

In connection with your visit to ILO on May 15, I have prepared a short note on ongoing areas of collaboration between us.

You will recall that following your luncheon with Mr. S.K. Jain, Deputy D"G, you have agreed to meet with ILO's senior staff.

From conversations I have had recently with visiting ILO staff to the Bank, following are the areas of likely interest to ILO:

- Bank lending policies and priority, particularly in Africa

- The Africa Facility (ILO has established a small facility of its own with a contribution of $500,000)

- Policies and problems of TA

- Bank views on collaboration with Specialized Agencies in general, and ILO in particular

- The possibility that ILO might participate in the CG meetings (one of Mr. Jain's favorite topics)

May 8, 1985

N. Raphaeli

P.S. I'll be visiting UNIDO on May 14-15.

ILO

The level of cooperation between the Bank and ILO is considerable and cordial, enhanced by the presence in Washington of an ILO Sr. Liaison Officer with the Bank. Recently, a second staff member was added.

The cooperation with ILO centers on four principal activities:

- The preparation of projects with vocational, technical and management training components--most recently in Zimbabwe and Zambia (normally, the Bank covers only the cost of travel of ILO staff)

- Procurement services, essentially for education and vocational training institutions. Currently, ILO is in the process of procuring equipment for a total of \$27m, including two large projects in Pakistan (\$7.8m) and Bangladesh (\$11.4m)

- Labor-intensive public works programs. ILO is paying, from a UNDP project, the salary of a specialist at TRP. Hired about a year ago, the specialist, Mr. Hertel, is being extended for two more years at a cost of \$150,000.

- Rehabilitation of public enterprise. Special focus in West Africa, starting with Niger and Togo.

We are pretty satisfied with ILO's delivery of services and greatly appreciate its willingness to adjust to Bank's policies on consultants and procurement. In terms of flexibility, ILO is far ahead of all other specialized agencies.

Nimrod Raphaeli

3 May 1985

With the Compliments of

Bill Bartsen

WASHINGTON BRANCH

INTERNATIONAL LABOR OFFICE

1750 New York Ave., N.W., Washington, D.C. 20006

Tel.: (202) 376-2315

® 21

We spoke. Many thanks for your help on this.

Mr. Marks, David Irving

He is presently working as financial controller for the World Bank in an agricultural project in Southern Sudan and his contract will finish on 10 March 1985. According to Mr. Marks, due to the adverse political situation in that part of the Sudan, the World Bank is contemplating withdrawing.

Would it be possible for you to obtain from the World Bank confidential information on his performance and personal conduct whilst working for them. This information could be sought in an informal manner and communicated to us in the same way.

Mr. Marks is highly qualified in the field of accountancy training and provided that his track record is OK, we would not hesitate to use him for future World Bank funded projects.

Many thanks

Jean-Pierre

J-P. Klein,
27.2.85.

Raphaeli (477-6955) ([illegible] 5 May)

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ASSIFIED

Date:

~~CONFIDENTIAL~~ DECLASSIFIED

Date: 9/1/2010

Mr. Husain

I have learned from the ILO Office in Washington that Mr. Blanchard, DG ILO, hosted a luncheon on April 10 for Clausen, de la Rosiere and members of the board of the International Confederation of Free Trade Unions. The discussion centered on the impact of adjustment policies on countries with free trade unions. There was discussion about a meeting of Labor Ministers in Geneva (no date given) to which Bank and Fund will be invited. (Mr. Blanchard defined his role as honest broker between democratic labor movements and the funding institutions).

Mr. Blanchard was informed of your visit to ILO on May 15 and expressed interest in meeting with you at that time.

April 12, 1985 N. Raphaeli

LETTER HANDCARRIED BY MR. SUIKKANEN TO WASHINGTON D.C. 28.3.85

RKS/MA (INVEST)

21.3.85

TAP 3-06-159 (sub-Sahara)

166

cc. CABINET
Mr. Bolin
DGA/TEC (2)
Mr. Abdel Rahman
Mr. Lemoine
REL/AFR
Mr. Gopinath, ILO N.Y
Mr. Bartsch, ILO Washington
B.O.

Mr. Xavier de la Renaudiere,
Chief, Special Office for Africa,
The World Bank,
1818 H Street, N.W.
WASHINGTON, D.C. 20433,

(U.S.A.)

Dear Mr. de la Renaudiere,

I have learnt with great interest about the establishment of the Special Office for Africa at the Bank and of your appointment as its Director. I understand that your office will facilitate the coordination of region-wide policies and programmes and liaise with donors and agencies in the UN System on sub-Saharan issues.

As you may be aware, the ILO has a substantial programme of work in sub-Saharan Africa both in research and in technical cooperation, including policy-related advisory services. The ILO's Regional Office for Africa in Addis Ababa is headed by an Assistant Director-General. Mr. Faisal Abdel Rahman, formerly Minister of State responsible for coordination and programming in the Democratic Republic of the Sudan, has been recently appointed to this post.

The critical situation in sub-Saharan Africa was discussed at the February 1985 session of our Governing Body and the need for coordinating ILO policy and action with those of donors, financial institutions and agencies of the UN System was emphasised.

It is in this context that I would like to invite you to the ILO for consultations on the Bank's approach, policies and programmes in the region and for exploring areas of possible cooperation. I am asking Mr. Bartsch, our Senior Liaison Officer in Washington, to deliver this letter to you and ascertain when it will be convenient for you to visit the ILO.

With kind regards,

Yours sincerely,

S.K. Jain
Deputy Director-General

THE WORLD BANK/INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

DATE April 9, 1985

TO Mr. Robert Townsend, Chief, Security Division

FROM Nimrod Raphaeli, Adviser, UN/UNDP Program and Project Operations

EXTENSION 76955

SUBJECT Pass to ILO Staff

I would appreciate your authorizing issuance of an annual pass to Mr. Rauli Suikkanen who has been assigned by the International Labour Organization to their office in Washington as the Liaison Officer with the World Bank. He will be working with Mr. William Bartsch who has been issued a pass last year.

Upon authorization, I will ask Mr. Suikkanen to contact the Security Office.

THE WORLD BANK/INTERNATIONAL FINANCE CORPORATION

OFFICE MEMORANDUM

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DATE April 8, 1985

TO Ms. Orma Hawkins, ADMSO

FROM Nimrod Raphaeli, Adviser, UN/UNDP Program and Project Operations

EXTENSION 76955

SUBJECT Guest from ILO-Geneva

Kindly issue an identification card for Mr. Milan Kubr, Chief of Management Development Branch, ILO, who is going to visit the Bank from April 10 to April 19, 1985.

P-1866

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		$
Calendar YEAR	1982	4,045,025.64
"	1983	3,864,028.95

Fiscal Year 1982 Disbursements to UN Agencies
Out of Proceeds of World Bank Loans and Credits

Country	Loan/Credit No.[1]	Title	Amount Disbursed (US $000) July-Dec. 81	Jan.-June 82	Total	Remarks
		Agency: FAO				
India	Cr. 963-IN	Inland Fisheries		37.61	37.61	
Indonesia	Ln. 1179-5-IND	Agricultural Research & Extension	40.00		40.00	
Indonesia	Ln. 1692-5-IND	Second Agricultural Training		515.67	515.67	
Nigeria	Ln. 1454-UNI	Lafia Agricultural Dev.	.02		.02	
Philippines	Ln. 1786-PH	Fishery Training		2.04	2.04	
Portugal	Ln. 1853-PO	Forestry	230.81		230.81	
Sudan	Cr. 782-SU	Livestock Marketing		93.77	93.77	
Tanzania	Cr. 1015-TA	Grain Storage & Milling		859.14	859.14	
Yemen, Dem. Rep.	Cr. 494-YDR	Education	7.54		7.54	
Yemen, Dem. Rep.	Cr. 768-YDR	Wadi Taban Agricultural	403.46		403.46	
		Subtotal	681.83	1,508.23	2,190.06	
		Agency: IFAD				
India	Cr. 871-IN	National Cooperative Dev.		1,306.92	1,306.92	
		Agency: ILO				
Algeria	Ln. 1595-AL	Fourth Education		8.35	8.35	
Bangladesh	Cr. 912-BD	Vocational Training	1,264.98		1,264.98	
Bangladesh	Cr. 990-BD	Low Lift Pump		210.01	210.01	
Dominican Republic	Ln. 1051-DO	Puerto Plata Tourism		78.44	78.44	
Indonesia	Ln. 1237-5-IND	Fourth Education	120.96	88.27	209.23	
Malaysia	Ln. 1329-MA	Fourth Education		272.39	272.39	
Mauritania	Cr. 459-MAU	Education	276.61		276.61	
Pakistan	Cr. 1109-PAK	Fifth Education		186.62	186.62	
Paraguay	Ln. 1866-PA	Industrial Credit & Regional Dev.		311.80	311.80	
Philippines	Cr. 790-PH	Rural Infrastructure	30.42	21.67	52.09	
Senegal	Cr. 908-SE	Third Education	116.91		116.91	
		Subtotal	1,809.88	1,177.55 0.00	2,987.43	

See next pg for July- Dec 1982

Amount Disbursed
US$

Agency: IFAD

Yugoslavia	Ln.1621-YU	Bosanska Krafina Agri & Agro		35,387.19	35,387.19
		Subtotal IFAD		35,387.19	35,387.19

Agency: ILO

Country	Loan/Credit No. a/	Title	July-December 1982	January-June 1983	Total	Remarks
Bangladesh	Cr.912-BD	Vocational Training	1,075,800.00	829,940.00	1,905,740.00	
Botswana	Ln.1408-BT	Fourth Road	307,106.79		307,106.79	
Cameroon	Cr.320-CM	Second Education	107,522.00		107,522.00	
Dominican Republic	Ln.1051-DO	Puerto Plaza Tourism		47,000.00	47,000.00	
	Ln.1142-DO	Second Education	158,788.00	42,745.60	201,533.60	
Egypt	Cr.868-EGT	Second Education	327,209.00		327,209.00	
	Ln.2074-EGT	Fifth DIB	290,955.54	230,487.03	521,442.57	
Ghana	Ln.1291-GH	Upper Region Agricutural Development		130.42	130.42	
Guinea	PPFP-205-GUI	Second Education		88,355.00	88,355.00	
Ivory Coast	Ln.1777-IVC	Third Education	263,348.31		263,348.31	
Malaysia	Ln.1329-MA	Fourth Education		110,470.81	110,470.81	
Mauritania	PPFP-156-MAU	Second Education	67,748.07	67,748.07	135,496.14	
	Cr.459-MAU	Education	32,251.93		32,251.93	
	Cr.1214-MAU	Second Education		485,636.07	485,636.07	
Morocco	Cr.2006-MOR	Third Water Supply		10,247.84	10,247.84	
Pakistan	Cr.1109-PAK	Fifth Education (Vocational Training)	148,000.00	148,309.19	296,309.19	
Philippines	Cr.790-PH	Rural Infrastructure	88,746.00	22,760.80	111,506.80	
		Subtotal ILO	2,867,475.64	2,083,830.83	4,951,306.47	

a/ Ln. refers to IBRD Loan
Cr. refers to IDA Credit
PPFP refers to Project Preparation Facility Advance

Calendar Year 1983
Amount Disbursed
US$

Agency: ILO

Country	Loan/Credit No.[a]	Title	January-June	July-December	Total	Remarks
Algeria	Ln. 1803-AL	Fifth Education		342,575.38	342,575.38	
Bangladesh	Cr. 912-BD	Vocational Training	829,940.00		829,940.00	
Dominican Republic	Ln. 1051-DO	Puerto Plaza Tourism	47,000.00	47,068.34	94,068.34	
	Ln. 1142-DO	Second Education	42,745.60		42,745.60	
Egypt	Cr. 831-EGT	Egypt Urban Development		32,510.00	32,510.00	
	Cr. 868-EGT	Second Education		382,055.91	382,055.91	
	Ln. 2074-EGT	Fifth DIB	230,487.03	205,268.93	435,755.96	
Ghana	Ln. 1291-GH	Upper Region Agriculture Development	130.42		130.42	
Guinea	PPFP 205-GUI	Second Education	88,355.00	16,051.00	104,406.00	
	Cr. 849-GUI	Education		32,813.82	32,813.82	
Ivory Coast	Ln. 1777-IVC	Third Education		214,857.41	214,857.41	
Malaysia	Ln. 1329-MA	Fourth Education	110,470.81		110,470.81	
Mauritania	PPFP 156-MAU	Second Education	67,748.07		67,748.07	
	Cr. 1214-MAU	Second Education	485,636.07	184,544.00	670,180.07	
Morocco	Cr. 2006-MOR	Third Water Supply	10,247.84		10,247.84	
Pakistan	Cr. 1109-PAK	Fifth Education (Vocational Training)	148,309.19	60,580.00	208,889.19	
Paraguay	Ln. 1866-PA	Industrial Cr. and Regional Development		204,198.33	204,198.33	
Philippines	Cr. 790-PH	Rural Infrastructure	22,760.80	25,675.00	48,435.80	
Zaire	Cr. 1241-ZR	Second Water Supply		32,000.00	32,000.00	
		Sub Total	2,083,830.83	1,780,198.12	3,864,028.95	

a/ Ln. refers to IBRD Loan
Cr. refers to IDA Credit
PPFP refers to Project Preparation Facility Advance

Mr Raphaeli (PPD)

PROGRAMME DES NATIONS UNIES
POUR LE DÉVELOPPEMENT

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DEVELOPMENT PROGRAMME

Bureau du Conseiller
pour les programmes de formation
et d'emploi

Téléphone 98 52 11
Télégr. UNATIONS Genève
Télex (UN) 28 96 96

p.a. B.I.T.
CH-1211 GENÈVE 22

Référence: INT/84/022

28 February 1985

Dear Ernesto,

I would like to thank you for sending me the notes you prepared on the UNDP/World Bank/ILO meeting held in Washington on February 15 on co-operation in labour intensive public works programmes.

I, in my personal capacity, share your very positive view on what was accomplished through the seminar, the inter-agency meeting and visits paid by the ILO team to Bank project officers. In my opinion these few days constitute an important stage in the development of co-operative efforts in which yourself and Ted Davies have been playing an eminent role and I do believe that the way we approached the issues of UNDP/World Bank/ILO co-cperation - which is a mix of enthusiasm and realism - will gradually but significantly contribute to help developing countries in facing such tremendous problems as lack of rural infra-structure, unemployment and poverty.

Looking forward to seeing you in Geneva on the occasion of the UNDP/ILO Joint meeting in support of SPWPs, I remain,

Yours sincerely,

Maurice Idoux

Maurice Idoux

Mr. Ernesto Henriod,
Senior Construction Industry Specialist
Transportation Department
IBRD
The World Bank
1818 H Street, N.W.
WASHINGTON D.C. 20433

cc. Mr. Rothermel, DGIP, UNDP, New York (with copy Mr.Henriod's letter)
Mr. Guha, EMP/URG, ILO, Geneva (idem)

FORM NO. 27 - OCR
(3/82)

WORLD BANK OUTGOING MESSAGE FORM Cable, Telex

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PAGE 1 OF 1

OFFICIAL DEPT/DIV ABBREVIATION: PPDPR

MESSAGE NUMBER

TEST NUMBER (FOR CASHIER'S USE ONLY)

START HERE

STIJN ALBREGTS HEAD OF SMALL SCALE ENTERPRISE AT ILO GENEVA AND TWO COLLEAGUES ARE VISITING YOUR COUNTRIES FOR INFORMAL DISCUSSION ON TRAINING ASSISTANCE TO SMALL SCALE ENTERPRISES UNDER GRANT FROM GERMAN GOVERNMENT. THEIR SCHEDULE AS FOLLOWS: NIGER MARCH 16-20, MALI MARCH 20-22, SENEGAL LATE MARCH. WOULD APPRECIATE IT IF YOU WOULD MEET WITH THEM AT THEIR REQUEST. REGARDS, RAPHAELI, ADVISER, UN/UNDP OPERATIONS, WORLD BANK.

END OF TEXT

PINK AREA TO BE LEFT BLANK AT ALL TIMES

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CLASS OF SERVICE:

TELEX NO.:

DATE: 3/12/85

SUBJECT: ILO VISIT

DRAFTED BY: MSalah:vcc

EXTENSION: 76732

CLEARANCES AND COPY DISTRIBUTION:

cc: Mr. L. Hinkle, WA1DA
Mr. N. Gorjestani, WA2DB
Mr. W. Bartsch, ILO, Wash. D.C.

AUTHORIZED BY (Name and Signature): Nimrod Raphaeli

DEPARTMENT: PPD

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(3/82)

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BOOK OF THREE

1. INTBAFRAD
   NIAMEY, NIGER

2. INTBAFRAD
   BAMAKO, MALI

3. INTBAFRAD
   DAKAR, SENEGAL

END OF TEXT

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cc. Mr. Raphaeli

BUREAU INTERNATIONAL DU TRAVAIL

GENEVE

DIRECTEUR GÉNÉRAL ADJOINT

Mr. S. Shahid Husain,
Vice President Operations Policy,
The World Bank,
1818 H Street, N.W.,
WASHINGTON, D.C. 20433
(U.S.A.)

19 FEV. 1985

Dear Mr. Shahid Husain,

I understand that you are planning to visit Geneva on Wednesday, 15 May 1985 to address the Annual Conference of the European Foundation for Management Development which is being hosted jointly by the ILO and the International Management Institute. The Conference is being held at the ILO building.

May I suggest that we also use the occasion to review some selected issues of Bank-ILO co-operation. It should be possible to arrange this either on the 15th itself or the following day according to your convenience. The review could include, besides a meeting between us, a working lunch and a meeting with senior ILO staff.

I would be grateful to know if this meets your approval.

with kind regards.

Yours sincerely,

S.K. Jain
Deputy Director-General

BY AIR MAIL
PAR AVION

BIT

1211 GENÈVE 22
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BUREAU INTERN. DU TRAVAIL

HELVETIA
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INTERNATIONAL LABOUR OFFICE
BUREAU INTERNATIONAL DU TRAVAIL
CH - 1211 GENÈVE 22

BIT

D1041

Mr. N, Raphaeli,
The World Bank,
Projects Policy Department PPDPR,
1818 H Street, N.W.,
WASHINGTON, D.C. 20433
(U.S.A.)

FORM NO. 75
(6–83)

THE WORLD BANK/IFC

ROUTING SLIP	DATE: 3/4/85

NAME	ROOM NO.
NIMROD R	

	APPROPRIATE DISPOSITION		NOTE AND RETURN
	APPROVAL		NOTE AND SEND ON
	CLEARANCE	X	PER OUR CONVERSATION
	COMMENT		PER YOUR REQUEST
	FOR ACTION		PREPARE REPLY
X	INFORMATION		RECOMMENDATION
	INITIAL		SIGNATURE
	NOTE AND FILE		**URGENT**

REMARKS:

I WILL BE
ATTENDING

FROM:	ROOM NO.:	EXTENSION:
Bob Youk	75769	C1213

Mr. Youker

1

16

February 28, 1985

Mr. Milan Kubr
Chief
Management Development Branch
Training Department
International Labour Office
CH-1211 Geneva, Switzerland

Dear Mr. Kubre:

Thank you for the invitation to Mr. Willoughby to attend the INTERMAN Symposium and the EFMD Conference. As you note in your invitation letter, we have taken a considerable interest in the growth of INTERMAN because we feel it will be very helpful to many of the institutions with which we are working.

The week of May 13 to 17 has been set aside by the EDI as a week when all senior staff will be in the Institute so that we may undertake planning coordination for the program for the coming year. That means, unfortunately, that Mr. Willoughby will not be able to be in Geneva for the conference.

We are concerned that there be a presence from the EDI and our colleagues in the Bank region. This is both so that we may have first-hand information about the conferences and to demonstrate graphically our support for INTERMAN. As a result, we are arranging for Mr. Robert B. Youker, a friend of yours who formerly was on the EDI staff and is now in the East Africa Projects Department working with management training institutions, to attend. Indeed, you may already have had inquiry about Mr. Youker's attendance sent through the ILO North American Regional Office. Mr. Youker is familiar enough with current EDI thinking to be able to answer inquiries from conference attendees and be able to spot information we need to keep up to date on INTERMAN activities.

We are very pleased that our vice-president, Mr. Shahid Husain, will be the keynote speaker on May 15. That will give us yet another window on the conference, albeit from a very different perspective.

We hope both the conferences are very fruitful and will look forward to a full report.

Sincerely yours,

Guy de Lusignan
Acting Director

JPGittinger/lvo
cc: Mr. Willoughby o/r
Mr. Youker, EAPIT (with cc. Inc.)

OFFICIAL FILE COPY

Tél. direct: (022) 99.76.86

Réf. BIT/ILO n° MD 1004

Mr. Christopher R. Willoughby,
Director,
Economic Development Institute,
The World Bank,
1818 H Street,
WASHINGTON DC 20433
(Etats-Unis)

11 FEV. 1985

Dear Mr. Willoughby,

INTERMAN Symposium and EFMD Conference

May 1985, Geneva

I have the pleasure of inviting you to two important international meetings in management development which will take place at the ILO headquarters in Geneva, from 12 to 17 May 1985.

The ILO/UNDP inter-regional project "Co-operation among management development institutions" (INTERMAN) will hold a Symposium of participating institutions and organisations on 16-17 May to review past activities and plan for the future. Immediately prior to this, on 12-15 May, the European Foundation for Management Development (EFMD) will hold its annual Conference. This year the theme will be "Management in Europe and in the developing countries: common issues and new forms of co-operation in management development". You will be pleased to learn that Mr. Shahid Hussein has accepted to address the EFMD Conference as a keynote speaker on 15 May.

These events have been planned in such a way that participants to the INTERMAN meeting can also attend the EFMD Conference. We hope that this arrangement will provide substantial extra benefits to the meetings themselves as well as to the participants. In particular, we expect that the conclusions of the EFMD Conference will form an important input to the INTERMAN Symposium.

1. INTERMAN Symposium (16-17 May)

The ILO/UNDP project was reviewed and endorsed by a first meeting of institutions in December 1980, which set the scene and discussed opportunities and priorities for co-operation. At this meeting 50 institutions and 17 regional and inter-regional organisations were represented. We had the pleasure of welcoming Mr. Price Gittinger.

BUREAU INTERNATIONAL DU TRAVAIL
OFICINA INTERNACIONAL DEL TRABAJO
CH-1211 GENÈVE 22 - SUISSE
Télégrammes INTERLAB GENÈVE
Telex 22 271 BIT CH
Téléphone (022) 99 61 11

The May 1985 Symposium will take stock, reassess priorities and consider the next steps for INTERMAN. We would greatly appreciate having the benefit of your experience and guidance. A preliminary note on the meeting is enclosed together with a copy of the ILO/UNDP Project brochure.

2. EFMD Conference (12-15 May)

This open Conference expects some 250 participants, mainly EFMD members (management development institutions and companies) from Europe, with a good participation from the other continents. A yearly event, in 1985 the Conference will focus in 1985 on relationships between Europe and the developing countries. As you are aware, INTERMAN closely relates in its policy and operations to major regional organisations. The combination of both events is an illustration of this co-operation.

The Conference will have a blend of plenary sessions with distinguished keynote speakers, and parallel workshops on specific topics. Each workshop, of a duration of one and a half hours, will be introduced by two or three presentations from participants both from industrialised and developing countries. Discussions will follow, and the aim will be to reach concrete suggestions and recommendations, including possible co-operation activities between management institutions from Europe and from developing countries.

The EFMD Conference brochure is attached. If, as we very much hope, you can attend both meetings, may I ask you to send back the registration form to the IMI-Geneva, organiser of the EFMD Conference, taking into account for the hotel reservations the fact that the INTERMAN Symposium will end on Friday, 17 May at 1700h.

I would also appreciate it if you could let me know directly whether we will have the pleasure of welcoming you in Geneva.

With best regards.

Yours sincerely,

M. Kubr,
Chief,
Management Development Branch,
Training Department.

The World Bank
INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
INTERNATIONAL DEVELOPMENT ASSOCIATION

1818 H Street, N.W.
Washington, D.C. 20433
U.S.A.

(202) 477-1234
Cable Address: INTBAFRAD
Cable Address: INDEVAS

February 14, 1985

Mr. Gianfranco Gribaudo
Chief, Fellowship Management Section
International Labour Organization
International Centre for Advanced
Techical and Vocational Training
Corso Unita d'Italia, 125
Turin, Italy

Dear Mr. Gribaudo:

In response to your letter of January 28, Ms. Marguerite Salah will henceforth be your correspondent for placement. Ms. Salah's mailing address is:

The World Bank
Projects Policy Department
1818 H. Street, N.W.
Washington, D.C. 20433
Tel. no. (202) 477-6732
Telex no. FTCC 82987 WORLDBK

Yours sincerely,

Nimrod Raphaeli

Nimrod Raphaeli
Adviser, UN/UNDP Program
and Project Operations

The World Bank
INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
INTERNATIONAL DEVELOPMENT ASSOCIATION

1818 H Street, N.W.
Washington, D.C. 20433
U.S.A.

(202) 477-1234
Cable Address: INTBAFRAD
Cable Address: INDEVAS

January 17, 1985

Mr. J. P. Martin,
Chief, Employment and Development
Department
ILO Headquarters
4 Route des Morillons,
CH 1211, Geneva 22
Switzerland

Dear Mr. Martin,

Following Mr. Hertel's meetings in Geneva, earlier this month, and consultation within our internal liaison group, we have advanced the drafting of the Agendas for the proposed Workshop and Inter-Agency meetings, on the subject of labor-intensive public works programs, to be held at our Headquarters in Washington, February 13 to 15, 1985.

The Workshop (to which we would intend to attract primarily participants from the Agriculture and Rural Development Sector) would take place in two afternoons, February 13 and 14. The Inter-Agency meeting would start at 9:30 am on Friday February 15. We would arrange for ILO staff not involved in the Inter-Agency meeting to meet with Bank projects staff working on countries where we have identified potential opportunities for collaboration.

We attach copies of the proposed Agendas for the Workshop and Inter-Agency meeting. We would be grateful for your comments on the general schedule for these meetings, as well as on the details of the attached Agendas. We are aiming for an early distribution of Workshop material to potential participants.

With kind regards,

Sincerely,

Ernesto E. Henriod
Senior Construction Industry Specialist
Transportation Department

cc: Messrs Pouliquen, Harral, Hertel (TRP), Schuh, Davis (AGR), Churchill, Freedman (URB), North, Furst (PHN), Habte, Verspoor (EDT), Raphaeli (PPD), Unit File 80-01-05

The World Bank
INTERNATIONAL BANK FOR RECONSTRUCTION AND DEVELOPMENT
INTERNATIONAL DEVELOPMENT ASSOCIATION

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Washington, D.C. 20433
U.S.A.

(202) 477-1234
Cable Address: INTBAFRAD
Cable Address: INDEVAS

January 17, 1985

Mr. Maurice Idoux,
Inter-Regional Advisor on Training and
Employment Programs
UNDP
c/o ILO
CH 1211, Geneva 22
Switzerland

Dear Mr. Idoux,

Following Mr. Hertel's meetings in Geneva, earlier this month, and consultation within our internal liaison group, we have advanced the drafting of the Agendas for the proposed Workshop and Inter-Agency meetings, on the subject of labor-intensive public works programs, to be held at our Headquarters in Washington, February 13 to 15, 1985.

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[illegible]

Sincerely,

[signature]

Ernesto E. Henriod
Senior Construction Industry Specialist
Transportation Department

cc: Messrs Pouliquen, Harral, Hertel (TRP), Schuh, Davis (AGR), Churchill, Freedman (URB), North, Furst (PHN), Habte, Verspoor (EDT), Raphaeli (PPD), Unit File 80-01-05

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1818 H Street, N.W.
Washington, D.C. 20433
U.S.A.

(202) 477-1234
Cable Address: INTBAFRAD
Cable Address: INDEVAS

January 17, 1985

Mr. Philip Reynolds,
Senior Project Management Officer,
Division for Global and Inter-Regional
  Projects
UNDP,
304, East 45th St.,
N.Y. 10017

Dear Mr. Reynolds,

Following Mr. Hertel's meetings in Geneva, earlier this month, and consultation within our internal liaison group, we have advanced the drafting of the Agendas for the proposed Workshop and Inter-Agency meetings, on the subject of labor-intensive public works programs, to be held at our Headquarters in Washington, February 13 to 15, 1985.

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With best regards

Sincerely,

Ernesto E. Henriod
Senior Construction Industry Specialist
Transportation Department

UNDP/World Bank/ILO

INTER-AGENCY MEETING ON
LABOR INTENSIVE PUBLIC WORKS PROGRAMS

February 15, 1985
9:30 am, Room N-955

Agenda

1. Meeting opened by senior Bank staff

2. Report by Mr. Sven Hertel on the first four months of his activities

3. Discussion of the results of the Workshop held on February 13/14, 1985

4. Future strategy for Inter-Agency Collaboration

5. Future funding of the position of the Specialist in Labor-Intensive Public Works Construction

6. Other business

WORKSHOP ON LABOUR-INTENSIVE PUBLIC WORKS PROGRAMMES

February 13-14, 1985

Time		Topic	Speaker
Feb. 13			
13:30-13:40	.	Opening address	Senior Bank Manager
13:40-13:50	.	Introduction to Workshop theme and programme	Davis
13:50-14:45	.	Special Public Works Programmes: their rationale and implementation	Guha
14:45-15:00	.	Coffee break	
15:00-15:30	.	Film on Special Public Works Programme in Nepal	ILO
15:30-16:30	.	A sectorial approach to labour-based methods: the case of road construction and maintenance	Edmonds
Feb. 14			
12:30-13:35	.	Introduction to Second Session	Henriod
13:35-15:00	.	Potential for collaboration between Bank, ILO and UNDP in the area of labour-intensive public works programme. Identification of issues and their solution. What the ILO can offer. Principles and issues to be discussed: • Project Objectives, types of investments, and beneficiary and target groups. • Institutional issues: Local government capacity, decentralization of planning and implementation, beneficiary participation. • Implementation issues: Resource mobilization, training, labour labour compensation, supervision, quality control and maintenance	Guha/Idoux leading ILO/ UNDP Rapporteurs

15:00-15:15	.	Coffee break	
15:15-16:00	.	Justification, economic and social analysis, monitoring evaluation and impact.	
16:00-16:20	.	Summing-up: areas for collaboration and recommendation for implementation.	Davis/Guha
16:20-16:30	.	Closing of workshop	Davis

SHertel:md/ks
Feb. 11, 1985
correction Feb. 13,1985

Ongoing and Potential Project Collaboration Bank-ILO

Region: West Africa

Country	Projects	Remarks	Action
Burkina Faso	. 4th Rural Dev. Fund Project	3rd Rural Dev. Fund project going slower than planned. Funds will be available till 88, therefore no hurry to prepare next project. Technical assistance presently provided by FAO Corporate Programme under contract which expires next year. Next project will as present have a large amount of labor-based activities in small irrigation, soil conservation, afforestation, etc. Somewhat doubtful that suggested bunds in terrain with very small slope (1%) are indeed effective. FAO has been requested to study this and other relevant features for follow-up project. Project officer Jan Pruntel (ex. 75200, room B-704) next mission June 85. For most labor-based activities food is being provided when farmers complete works even though it was supposed to be self-help, this Pruntel feels could distort the project selection by farmers.	Contact Pruntel again by May 85
	. 5th Highway Project	4th Highway Project which contains labor-based component not going well (Brigitta Mitchell)	No action
Cameroon	. Center South Region Rural Dev. Project	Project being appraised, mission returns Feb. 16, 85. Project officer Nightingale.	Contact Nightingale on his return
Gambia	. 2nd Highway Proj.	ILO/EMPTEC participating in appraisal end-Jan./beginning Feb. 85.	ILO to provide report
Ghana	. 4th Highway Proj.	ILO/EMPTEC will provide technical assistance to be financed by UNDP for feeder roads component. Yellow cover appraisal report has been completed	

Region: West Africa

Country	Projects	Remarks	Action
Guinea	. 2nd Rice Project	Is a follow-up of first rice project, labor-based operations would be limited (bottomland development some clearing in connection with roads). The project was appraised in Oct. 84, Yellow Cover appraisal report to be completed by March 85. Project officer Baah-Dwomoh (Abidjan Office)	
	. 3rd Highway Proj.	Approved Bank Board March 84. Mainly equipment intensive. Project officer Brigitta Mitchell Reasons for lack of labor-based methods in general: - unrealistic exchange rate (parallel rate 9 times official) - unwillingness of labor to work at official labor rates (they must be tripled) - in certain places low population density - mountainous terrain and heavy rains in many places Structural adjustment credit being prepared, the ground may be laid for more rational technology choice and then ILO could eventually play a role Loan officer for Guinea Paul Cadario not in favor of introducing more labor-based methods	If opportune (and dependent upon ILO recommendations) efforts may be made to influence Structural Adjustment to address problem of choice of technology, or probably more realistically use it for furthering labor-based methods in future projects
Mali	. 2nd Urban Proj.	Feasibility study being carried out by consultants. Need for specific sub-study of alternative stone pavements by labor-based methods. Project officer (Bernard Veuthey, ex. 72675, room C-322) asks if ILO would be able to assist with stone pavement study. No other project parts are envisaged as particularly labor-intensive.	ILO to indicate if interested in carrying out study

Country	Projects	Remarks	Action
Mauritania		All investment programmes must according to agreement be reviewed by the Bank before Mauritania can implement them irrespective of source of financing. I discussed in detail ILO project with project economist Nagele. There are no new Bank projects on the horizon for Mauritania, nevertheless we agreed to keep in touch.	Contact Nagele when ILO project preparation com pleted
Region : East and Southern Africa			
Burundi	. Muyinga Agric. Dev. Proj.	Preparation mission by Lafourcade Jan. 21 to Feb. 15. Previous Rural Development Project had interesting components: afforestation, soil conservation, roads water supply.	Get information on project.
Madagascar	. Rehabilitation Irrigation	Project has been appraised and is now in Yellow Cover. Local contractors using equipment intensive methods will be used. Project officer Meerman admitted that probably more labour based methods could be used. Foreign and local consultants are preparing projects. Meerman would welcome ILO assistance in particular to define organizational arrangements and optimum technology for carrying out maintenance.	EMPURG wants further p progress in their proj before going any further If ILO is able to provide assistance they should meet with Meerman Contact Weijenberg on March 2o other Madagascar agrc. p
Rwanda	. 6th Highway Proj.	Project will include element to enhance use and effectiveness of labor-based maintenance methods. Bank's transport division of opinion that entire technical assistance should be carried out by one firm, therefore ILO would not play a role. Project will (hopefully) also include a communal roads/infrastructure component starting with a small study of communal infrastructure, etc. to be carried out by independent consultants, thereafter to extent found feasible to be followed by technical assistance to communes for planning and implementing of rural works. The ILO would be ideal for undertaking the technical assistance.	Contact project officers van der Ven and Sooh upon their return from Rwanda post-appraisal
	. Gitarama Agric. Services		

Country	Projects	Remarks	Action
Ethiopia	. 2nd Highway Sector Proj.	Project officer Melegari was of opinion that progress under labor-based feeder roads component (15 km up to Dec. 1985) had been insufficient. Only one team had been mobilized, at least three more had to start work, otherwise he could not recommend the continuation of labor-based methods. EMPTEC providing technical assistance and procuring tools, light equipment, etc. for this component. He sensed that the government (ETCA) was not too keen on labor-based methods. Jovanovic project economist of opinion ETC was not biased against labor-based methods.	EMPTEC to discuss with Melegari and examine with ETCA possibilities for increasing substantially production.
	. Small Scale Irrigation	IFAD/Bank identification mission in Feb. 85, project appraisal envisaged towards end 85. Need for preparation/ preappraisal in between, ILO participation may well be advantageous (project officer Kuffner back end Feb.).	Contact Kuffner on his return.
	??	Reclamation study being carried out presently by FAO expected to give rise to a project with possibilities for subsequent collaboration with ILO. WFP presently spending about US$35 million per year, IFAD and EEC in certain cases joining them to provide tools, equipment and financing for elements which cannot come under WFP, all so that the assets created under WFP become more useful and more effectively implemented. Project officers of Bank of opinion that there was scope for similar Bank cooperation with WFP. In opinion of Kuffner and G. Stern (agric. project officer) many works which could be carried out by labor-based methods were in fact carried out by equipment-based methods.	As soon as ready ILO will submit to SH project preparation for SPWP (probably at a value of US$7 million) in Ethiopia for discussion with agricultural div.
Sudan	. Western Savanna Pr.	Project being prepared by consultants. Project officer Marples will bring preparation report back to Washington by Feb. 23, 85.	Contact Marples and get preparation report on his return

Region: East Asia and Pacific

Country	Projects	Remarks	Action
Laos	. 3rd Agric. Rehab. and Dev. Proj.	Feeder roads component partly to be implemented by labor-based methods. Bank awaiting Government approval of component (which has been prepared in lieu of original other project component for coffee processing plant).	ILO/EMPTEC should under existing UNDP Project Document assist in implementing labor-based component.
Thailand			
	. Rural land use	Project being prepared. Possibly it would have suitable components for ILO assistance.	Contact preparation mission members (Mr. Lindt, Ms. Okonjo-Iweala) after return Feb. 23, 85.
South Asia			
Bangladesh	. Access and market	project has been prepared by FAO. Harald Stier (ext. 32289, room H 4093) returns from preparation mission Feb. 19.	Contact Stier on his return, provide him with documents on ILO and Nordic countries experiences.
	. Rural Employment and Training Proj	Messrs. Nijhawan and S. Santos on preparation mission, will be back mid March. On previous mission Mr. Arsino from ILO HQ participated.	EMPURG should contact Arsino. Contact Santos mid-March.
	. Third Flood Control and Drainage Proj.	Yellow Cover Appraisal report Jan. 85. Project officer Salem Gafsi considered it too late to involve ILO, but they could be involved in follow-up project.	
	. Fourth Flood Control and Drainage Proj.	to be appraised in latter part of 85 with basically same components as for 3rd. ILO participation would be welcome to improve construction methods (labor-based) as pilot activities within the project without dealing with project implementation at large.	SH should discuss with EMPTEC. Gafsi to contact SH on his return mid March.
	. Upazila Dev. Proj.	at stage of identification. Mr. Ronald Ng visited Bang' lesh in Nov. 84.	

Region: South Asia

Country	Projects	Remarks	Action
Pakistan	. Income generating project for refugee areas	Project components in areas of Afghan refugees in Pakistan. Pakistani contractors carrying out work mainly by labor-based methods. Bank officer M. Naseem thought that possibly labor content could be increased, he is there on mission till Feb. 20. ILO was at an early project stage involved, but have since not been. Would ILO either EMPURG or EMPTEC be interested in looking at project. There is possibility of follow-up project and it would be useful to have external expertise to go through applied construction methods.	Contact to Naseem on his return.
Nepal	. Medium Irrigation Project	Preappraisal March 2-20'85 with ILO participation. Project officer Engelhard Kramer (ext. 32825, room H4189).	ILO to meet Kramer.

Latin America and Caribbean

Country	Projects	Remarks	Action
Brazil		Projects presently being prepared for North-East Brazil do not contain employment creating components per se. However, a rural employment study is presently being carried out in the state of Bahia. The purpose of study: review employment situation, structure, income distribution, etc. Thereafter, to examine what type of activities would create how much employment for which groups. Based on a recommended strategy, hopefully a project would be developed initially for Bahia, subsequently to be followed in other states. The study is expected completed by mid-85. Eventual projects are well down the road. Above information received from David Mitchnik - LCPAB (ext. 75250, room C 822), he will participate in workshop.	Further discussion should take place with Mitchnik.
Guatemala	. Altiplano Proj.	Preparatory mission by Douglas Forno (ext. 75715, room E 843) in Dec. 84. Project would include small scale irrigation, terrazing and roads all to be done by labor-based methods. FAO not anxious to prepare such type of project, therefore Forno would consider ILO a good choice for preparation. He asked if ILO would have to be paid? There were some macro-economic matters to consider before project preparation could proceed. He said that the security situation in the areas considered was good.	Further discussion should take place with Mr. Forno. And ILO should explain/ show project preparatory work they have done in Guatemala.
Haiti	. Transport 7	It is mostly a road maintenance project with substantial bridge reinforcement/maintenance. The Project Brief is being elaborated. The project is likely to be advanced so that it will be preappraised in March and appraised in June 85. It appeared that labor-based methods would not be of great importance as now planned. In my analysis of Haiti road maintenance in 1984 I had recommended more extensive use of labor-based methods, it seemed doubtful that had been fully considered. Specifically I had recommended technical assistance in that area. Would EMPTEC be inter sted in providing technical ass tance?	When Project Brief is available it should be reviewed by SH.

Region: Europe, Middle East and North Africa

Country	Projects	Remarks	Action
Tunisia	. Integrated Regional Dev. Project in Center-West & . Integrated Regional Dev. Project in North-West	Being prepared by mostly local consultants engaged by Ministry of Plan. Project officer for urban part of project Ph. Annez coming back on Feb. 12. Douglas Lister from agriculture and with whom I spoke had not had contact with consultants.	Contact Annez
Turkey	. Agricultural Sector Proj.	Project has been appraised and Yellow Cover Appraisal report under preparation. Cannot be considered a vehicle for labor-based methods.	
	. Rural Roads Proj.	A likely project, preparation mission to Turkey first week of March 85. The Dept. for General Services Agriculture which should implement this project did to project officer (Knighton) not ~~appear~~ ear very keen on labor-based methods and Bank not keen on pressing.	
	. Rural Infra-structure Proj.	In the Bank's lending programme for FY87 appear a possibility for using labor-based methods, there is enough time for the idea to mature. Project officer Burcroff	Contact Burcroff
		General: It seems that the Planning Ministry has not done enough to promote to line ministries labor-based methods.	