

ポーランド・スロベニア
鉍工業プロジェクト選定確認調査
報告書

1995年7月

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国際協力事業団
鉍工業開発調査部

鉍 調 計

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ポーランド・スロベニア 鉍工業プロジェクト選定確認調査 報告書

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ポーランド・スロベニア鉱工業プロジェクト選定確認調査

I. 派遣目的 平成7年度鉱工業分野開発調査として、両国に対し調査団派遣を行い既に先
 方政府より要請のあった案件に関する詳細情報入手・現地視察、或はそれ以外
 の分野についても関連機関と協議を行い、案件の発掘・選定を試みる。

II. 派遣機関 95. 5. 15～95. 5. 27

III. 調査団構成	氏名	役割	所属元
	棚橋 滋雄	団長・総括	JICA鉱工業開発調査部部長
	高橋 克彦	技術協力政策	外務省経済協力局開発協力課課長補佐
	井上 和俊	技術協力行政	通産省通商政策局ロシア東欧室課長補佐
	後藤 王喜	産業公害	通産省環境立地局産業施設課係長
	今井 千郎	環境調査	JICAオーストリア事務所企画調査員
	尾崎 洋二	企画・調整	JICA鉱工業開発調査部計画課職員

IV. 派遣日程	月日	行動内容
	5/15	移動：成田---バリ (JL-405; 11:30) (棚橋、井上、後藤、尾崎)
	5/16	移動：バリ---ワルシャワ (AF-1910; 8:45) 大使館表敬、児玉専門家と面会
	5/17	援助調整局、商工省、民営化省、環境省表敬・協議 (高橋団員到着：20:30; LO-362)
	5/18	現地視察 (ミエレッツ市; PZL)
	5/19	現地視察 (火力発電所) 大使館報告
	5/20	移動：ワルシャワ---チューリヒ---リュブリアナ (LO-291; 7:45---9:40) (SR-6450; 13:25---14:50) (井上団員帰国：LO-379; 17:00, JL-408; 20:50)
	5/21	資料整理 (今井団員到着：OS-835; 15:40)
	5/22	経済省、科学技術省、財務省、環境省表敬・協議
	5/23	現地視察 (マリポー市産業廃水予備処理) (TAM社等)
	5/24	現地視察 (MARLES社) (今井団員帰国：OS-836; 16:20)
	5/25	資料整理 移動：リュブリアナ---ウィーン (OS-836; 16:20---17:20)
	5/26	大使館、JICA事務所報告 移動：ウィーン---フランクフルト---成田 (OS-127; 17:55---19:25) (JL-408; 20:50---15:05)
	5/27	成田着 (15:05)

V. 団長所感・議事録

1. 閣僚会議府援助調整局

日時/場所：5月17日 9:00~10:00

参加者：ポーランド側 DIRECTOR, T. ZOLTOWSKI, Mrs. B. MROWKA
調査団 全員
大使館 平良書記官

協議概要：

1) 当方団長より、今回の往訪目的について説明したところ、ゾルトブスキー氏より以下の内容の発言があった。

ポーランドは、経済計画の最初の成功をおさめ始めており、ポーランドの中小企業の60%は民間企業である。環境汚染をもたらす大企業に対しては、大規模な改善が必要と考えており、これは大統領の産業政策戦略に沿ったものである。

2) また、ポーランドの経済政策を調整するため、国家の行政改革を行い権限を集中した大規模な経済省を設立したいと考えている。

3)

ア. 今の政府は安定している。これが安定した経済政策を生み出す。このなかで、産業リストラが成功することが重要である。

ミエレツのプロジェクトは日本との関係が深く、2年前に日本の支援で同市活性化のための資金が提供された。

同地域は経済的な面でも精神的な面でも日本の支援を受け入れる雰囲気がある。

イ. 石膏対策については、タイミングの良いプロジェクトである。

ウ. 省エネルギー、中小企業のテーマは複雑な問題である。特に省エネルギーについては、エネルギー価格が非常に安かったが、金融機関の指導もありその価格は国際価格に近づきつつある。技術支援は、タイミングがよいものである。

4) これに対し団長より、ポーランドのリストラ支援に関してPHARE・国際機関・米国がどのような協力をしているのか?、また、全国省エネルギー公社に対し、PHAREは支援しているのかとの問いに対し、ゾルトブスキー氏は以下のように答えた。

PHAREからの援助はポーランドに対する海外からの援助の70%をしめている。

また他に、米国・英国・カナダの協力は企業基金(Enterprise Fund)があるが、これらは技術支援でなく金融支援であった。しかし、省エネルギー分野では、PHARE、その他からも資金的協力は無い。

2. 商工省

日時/場所：5月17日 商工省

参加者：Director Mrs. B. Kowalak (Department of Economic Strategy and Policy)
Chief Specialist Mr. S. Zimmer (Foreign Cooperation Department) 他多数
調査団全員

協議概要：

1) 企業リストラクチャリング関連

時間的な制約もあり、現地視察で訪れるミエレツ市のPZL-MIELECを除くリストラ調査対象2社の代表を商工省に招き聞き取り調査を中心におこなった。

・Boleslaw P. P.

電解亜鉛生産の最大手の企業であり、採鉱から製錬まで行っている。その生産量はポーランドで国

内シェアは50%を占め、年間64000トンの生産量を誇る。

その大部分は国内消費に振り分けられ、20~30%は輸出用となっている。

企業自身が認めるウイークポイントとしては、鉛・亜鉛が国際市場価格に影響されやすいこと、生産工程でのエネルギー消費が大である、硫酸・廃棄物・廃水などによる環境への悪影響、鉱石の低品位などがある。

当企業は独自の長期計画を策定しているが、原料入手基盤の拡大、亜鉛の電解処理タンクの近代化、環境対策を掲げ、これら目標の達成に必要な4000万ドルの資金援助を日本側に要望していた。また、軍事関連生産は無い。

・Constal-S. A.

貨物列車、路面電車、鉱山用機関車、橋梁の鉄骨などを生産している。

この企業自身が認めるウイークポイントとしては、老朽化した設備・古い施設・塗装技術改良・94年に初めて赤字に転落した以前のように黒字17~19%で安定させること等である。

更に、日本側への期待としては、塗装技術改良、設備更新への資金面での援助をあげている。

・PZL-Mielec Engine (5月18日：現地調査実施)

この企業はディーゼルエンジンメーカーであり、主要商品には発電機、ポンプ、船舶用のものもあり、かつ輸送機関、農業機械向けも生産している。

資本金は1350億ズロチであり、実質的に国の管理下で運営されている。

また、会社運営面においては、Managig board たる取締役会には100%国家管理下の預金信用金庫(株式40%保有)産業開発庁(株式18.8%保有)、また100%国営のPZL-Mielec(株式29.36%保有)から役員が派遣されており、JICA支援の前提たる国営企業と言って良い。また、同様に支援の1条件である民生用企業であるという点についても、問題はない。

現在の問題は、85年比較した生産量の激減(1/10)、独メーカーの参入による競争激化や、ミエツ周辺が構造不況地域と指定されていることも考慮したうえで、将来的な方向を摸索する上で指針作成と資金面での協力をJICAに対し要望していた。

以上のように、3社とも技術協力のみならず、資金面での援助もを日本側に期待しているようである。

2) 産業廃棄物再利用計画

「ボ」側は排煙脱硫石膏よりも燐酸石膏が最大の問題と考えており、この問題を解決していくにはEC域内での市場開拓をも視野にいれた再利用の用途と技術開発がポイントであり、同時に建築資材として伝統的に煉瓦を重視する自国民の考え方にも留意する必要がある。燐酸石膏は建設用・住宅用以外のものに使う必要がある。また排煙脱硫石膏は、2000年頃には120万トンとなろう。

3) 省エネルギー計画

最もエネルギーを消費する重工業への依存度が近年減少してきており、全国的な省エネルギーへの取り組みが盛んであるとは言えず、省エネルギー対策は個別企業の問題であるとし、また、具体的な省エネルギー計画へむけての取り組みは商工省ではなく、全国省エネルギー公社で行っているとの発言もあったが、同公社の責任者不在で協議できず、具体的な進展はなかった。また、関係省庁が多数あり、商工省がイニシアチブを取りにくいとの発言もあった。

4) 産業政策

局長より、以下の要旨の発言があった。

93年90月、“95年~99年産業政策”が閣議決定され、この産業政策の基本方向を踏まえた3ヶ年(95-97)のIndustrial Policy Programmeがこの5月16日に閣議決定された。優先課題として①輸出振興 ②産業技術政策 ③構造調整(リストラ)の3分野での具体的なプログラムを決定したものである。

この中では課題別アプローチの他、セクター別のアプローチも含まれている。

また、中小企業政策プログラムもこの5月中に閣議決定される予定である。

更に、地域政策として、失業問題が深刻化している地域を指定し、構造調整を行うための助成措置を行う法律は94年10月に制定されたが、これによる地域指定・支援措置を現在準備中である。

この他担当部局専門官より、民営化の進展状況・形態（従業員リース）、税制（輸出志向企業への優遇税制）、及び基準認証（ISO9000の導入）についての説明があった。

3. 民営化省

日時・場所 5月17日 民営化省 205会議室

参加者 Director: Artur WASK 他2名

調査団全員

協議概要:

調査団団長より、調査団来訪の目的等について説明のあった後の先方の発言要旨は以下の通り。

日本の対ポ投資の実績が低いことは非常に残念であり、米国が「ポ」を「Emerging Market」の一つとして位置付けているところ、またアジアからは韓国の投資の動きも活発であり、今後の日本のポーランドへの投資が進むことを期待している。

また、今回の企業リストの調査対象となっている2企業に関して以下の情報提供があった。

・Constal-S. A.

大規模民営法の対象となる444社のうちの一つであり、最終的に国家投資庁の株式保有が10%程度と非常に低下する。但し、今後も2年間程度は国営企業としてとどまることが考えられる。

・PZL-Mielec. Engine

上記444社のリストにははいておらず、当面民営化はない模様である。

4. 環境省

日時・場所 5月17日 環境省会議室

参加者 Vice Director: Mr. S. Kaminski 他計2名

調査団全員

協議概要:

まず、先方より以下の要旨の発言があった。

現在は、短期的政策（95年まで）、中期的政策（2000年まで）、長期的政策（2020年まで）の3段階にわたる政策を実施している。

当省では有害物質を排出する企業80社のリストを管理しており、昨年20社、今年も20社がリストより除外されることになる。

大気汚染については90年に大気保護法が制定され、排出基準が設定された。

これにより、火力発電所・熱供給プラントに脱硫装置を設置させることとなった。

また、大気関係の法律には、欧州全土を対象とする長距離的大気汚染条約があるが、わが国は調印した。その内容の一部はSO_xを隣国へ流すことを制限するもので、その総量を80年のレベルを100として、2010年までに70にすることを目標にしている。

このため、石炭品質の向上・脱硫計画が大きな課題となり、脱硫装置から発生する排脱石膏の処理がクローズアップされてきた。

3年前より、環境省が調査を行った結果では、2000～2005年にかけて、毎年150～200万トンの石膏がでていいる。さらに、この脱硫石膏は天然石膏よりもいい面があると言われている。

ドイツにおいては、脱硫石膏を石膏ボードとして使っている例があり、ドイツ企業がポーランドで石膏ボードを作る計画がある。今後は脱硫石膏の良さを国民にアピールし、市場拡大をにらんで調査していく必要がある。

5. 団長所感

1) ポーランドの経済改革は、'92年以降、実質GNP、鉱工業生産は拡大・回復の方向にあり、消費者物価の上昇も終息に向かっており、失業者数の増加もとまっているのでマクロ経済指標を見る限り、成功しつつある。'95年は更に状況の改善が予想されている。

2) 企業・銀行財務再建法が93年3月に施行され、金融機関の不良債権の処理方針が固まり、経営の健全化がはかられつつあり、また企業の負担となっている社会保障基金に対する不良債務も財政支援により軽減化されている。これにより、企業再建の一步を踏み出す条件が整いつつある。

3) 国営企業の民営化は、国営企業8441の37%の3131社が民営化の過程にある。

また、大衆民営化法に基づく444社を管理するNIFの15社のFund Managerも決定した。

この進捗状況は必ずしも順調と言えないまでも、着実に進行している。

欧米企業が積極的に参加しているなかで日本のプレゼンスが低いのは(但し、山一証券がFund managerとして参加している)ポーランド経済に対する最近のパフォーマンスを正当に評価していないのではないかとすることが危惧される。

4) 産業政策については、93年9月に閣議決定された"Industrial Policy Objectives"を受け、この5月16日に"Industrial Policy Programme95-97"が閣議決定された。

この中には、輸出振興、技術振興、構造改革(リストラクチャリングを含む幅広い概念)地域振興策等の課題別アプローチの他、戦略部門、エネルギー・資本集約的部門、優先部門等の業種的アプローチも含まれている。また、中小企業政策プログラムも95年5月9日に閣僚評議会経済委員会で承認されており、この5月中に閣議決定される予定である。しかしながら、これら政策も、金融・財政支援の規模によって実効性が左右されると思われる。

5) 個別テーマについて

a. 企業リストラクチャリング PZL-Mielec Engine Ltd.

この会社はPZL-Mielecより分社・独立した3社の一つで、バス・トラック等のエンジン、ポンプ用、自家発電用等のエンジンを専ら生産している。株式所有は、100%国所有のルブリン信用金庫・産業開発庁が各々40%、18.8%を持ち、また国営企業たるPZL-Mielecも29.36%所有する。つまり、大部分が国の管理する商法法人であると考えられる。

またこの会社は、ミエレッツの地域振興対策地域に指定される予定の地域に存在する。

経営幹部も近代化に力をいれており、現在、課題となっているエンジンのニーズの多様化に対応できる生産設備の近代化に日本の持つノウハウの注入が期待されている。

・Constal S. A.

この会社は大衆民営化法の444社の一社であり、現時点JICA企業リストラ対象とするのは好ましくない。

・Boleslaw P. P.

鉛・亜鉛の鉱山会社であり、採鉱から精練までを担当している。既に自社で近代化計画を作っており、その実施に必要な4000万ドルの資金協力を要請したいむきであるので、リストラ調査対象企業とすることは好ましくない。

b. 産業廃棄物再利用計画

・DOLINA NIDYで天然石膏を使った石膏ボードが作られており、排煙脱硫石膏についてもポーハートーフの排煙脱硫装置で生成されるものがセメント用に使用され、またドイツ企業と合併で石膏ボードを作る計画が進んでいる。

・2000~2005年の生産は、排煙脱硫装置の設置計画にもよるが、年間150~200万トンと予想される。

・問題は、グダニスク、ポリフェの肥料工場及びボレスラフの化学工場からでる燐酸石膏であり、それぞれの地域に既に1200万トン、3500万トン、250万トンが堆積している。

更に、同10~70万トン、250万トン(最大)、10万トンの新規石膏が堆積するということである。

これらで使用される燐鉱石は、北アフリカ、ロシアのコーラのアバタイトと同種のものであるが、この中にランタン系の希土類が含まれているので、建設用・住宅用には使用できないとの説明があった。

従って、更に専門的調査を行う必要がある。

c. 省エネルギー計画、中小企業対策

説明資料を提供し、関係先に伝達するよう要請した。

以上

VI. 議事録・現地調査（スロベニア分）

1. 経済省

日時 95年5月22日（10:05～11:30）
出席者 State Secretary for Small business Stasa Baloh Plahutnik
Counsellor for the Minister Stanko Gaberc
Undersecretary Damjan Hotevar
調査団全員

協議概要：

昨年、JICAの田辺専門家が1ヶ月にわたり調査した結果に基づき、更なる両国の協力が実現することを希望するとの期待が述べられた後、先方より中小企業振興について、民営化庁の所管としつつも、以下の発言があった。

中小企業の民営化については90年に着手され、手工業を中心に他業種にも移行しつつある。

現在は3万社程度が中小企業とされ、その生産量は全国生産量の25%程度であり、現在の中小企業としては貿易・金融セクターが増え、企業構造も西欧型に近づきつつあると言える。

経済省としては、これら中小企業振興のためネットワーク作りを行っており、経済省、労働省、科学技術省、手工業会議所、商工会議所等の機関より、960人のプロモーターが情報提供や振興事業を行っている。

中小企業振興基金の設立により、債務保証等を行っている。また、科学技術省所管のTechnologica-1 Fund と連携して、効率的な支援を目指している。

金融部門と平行して、国内大学及び英米独の訓練機関で学んだ150人のアドバイザーを中小企業振興のために、各地に配置・巡回してもらうとともに、18のインキュベーター及び300のイノベーターを配置している。

更に団長より中小企業の定義、中小企業振興基金の財源について質問したところ、先方より以下の回答が得られた。

中小企業は従業員50人以下の企業と定義している。

また、中小企業振興基金の財源は政府の政策によって支出が行われる。基金の規模はこの2年間で15百万DMであった。本基金の役割はこのような資金の供給とともに、案件の調整を行うことである。

また、必要に応じ債務保証を行う機能を有する。更に現政府内で検討中の民営化法が可決された場合、政府予算の枠外に作られる民営化資金の10%を中小企業振興に充てられる様、期待している。

更に、ネットワーク作りについては、かつて地方組織が細分化しすぎたことに対する反省もあり、現在地方組織を再編中であるが、それに併せて各開発センターにアドバイザーを配置している。

続いて先方より、マクロ経済指標についての発言があった。

- ・工業セクターの被雇用者数は25万人、その生産額はスロベニアGDPの40%にあたる。残りは農業の4%を除き、サービス産業が占めている。
- ・GDPは94年で4000billion USDで、一人当たりGNPは7000USDで、2000年には9000USDとなる見込み。
- ・94年の輸出入額はいずれも7billion USDで、バランスが取れている。
- 但し、対日輸出入は、各々18.2, 125 USD (million) で対日赤字を計上。
- ・GDP成長率は、95年は5%を予測している。但し、95年第一四半期の成長率は前年同期と比較して9%の伸びを達成している。
- ・95年目標は、EUのAssociate Memberとなることであるが、加えて自由貿易協定も締結済のハンガリー、チェコ、スロバキアに加えて、ポーランドと交渉中であるが、今後ラトビア、リトアニア、エストニアとも同様の協定を締結することとしたい。
- ・94年の失業率は14.5%で失業者数は12万人。失業者数は94年まで増加傾向にあったが、

95年は低下すると予測される。

- ・現在実施中の巨大投資プロジェクトとして、EBRDによる高速道路整備がある。現在はKoper-Maribor, Karavante-Zagrebの両高速道路整備を行っている。
- ・インフレ率は94年：18.3%、95年は10%までに抑えたい。
- ・利子率は10%である。

現在は欧州及び世界的技術規格の導入につき検討中であり、主なものは95年末までに終えたい。次いで、調査団より経済政策の長期計画について質したところ、以下の回答があった。

2週間前に「2000年に向けての開発戦略」を国会に提出したところである。約1ヶ月後に公開(国会承認を経て)されるものと期待している。

また、貿易相手国の構成はついて、65%は欧州、10%が東欧、残りが日米等である。

この後、先方より中小企業振興について我が方協力の可能性について照会越したのでJICAバンフレットを手交しつつ、協力形態は技術協力に限定されること、及びG-Gベースの協力ゆえ、具体的協力については科学技術省経由で我が方に要請するのが望ましい旨返答しおいた。

2. 財務省

日時 95年5月22日

出席者 Advisor to the Government Tatjana Svajger
Resident Advisor to the
Monitoring Unit EU/PHARE Sander W. Winckel
調査団全員

協議概要：

表敬訪問を行ったところ、先方より以下の内容の話があった。

我々としては、JICAとの関係はマクロ経済システムに対する研修員派遣のみと承知しているが、訪問の目的は何か。

また、団長より「マリポール市における産業廃水予備処理」に関する調査を実施に移せるよう、今次ミッションが派遣された訳であるが、これに対する財務省としての支援可能性について質したところ、以下の発言があった。

緊急に拠出が必要プロジェクトにつき財務省が支出を行うことがあろうが、本件は経済省の所管と史料する。

最後に団長より、ドラバ川の環境保全について、EBRDが既に何らかの支援をしていることは承知するも、マリポール市にとって工場廃水の事前処理が不可欠との観点より要請がだされているものと承知している。詳細は現地にて協議するが、EBRDとの重複を避けたいと述べたところ、以下の回答があった。

EBRDがマリポール市に具体的にどの案件をどこに支援して貰えと指示する訳ではない。重複については何とも回答できないが、将来的にEBRDに関わりうる案件であるというは理解した。

但し、本案件はあくまでも財務省の所管外であり、科学技術省、あるいは必要であればロンドンのEBRDに照会するのが最善であると考えられる。

3. 科学技術省

日時 95年5月22日

参加者 Director Mrs. Riama Benko
Counsellor to the government Mr. Milos Komac

協議概要：

冒頭、団長より各省との会談概要について報告があった後、先方より発言があった。

日本の調査については、一年半前出した要請に答えて3月に派遣予定であった道路網についての調査が直前に他機関との重複があるとの理由から延期となった経緯もあり、廃水処理調査実施に対する

日本の意向を確認したい。

これに対し団長よりこの点について特に問題なく、タイミング、重複もないと回答したところ、先方よりマリボル市の案件は、一部を開始したとの情報があり、心配しているとのコメントがあった。これに対し、今井団員より、工場のいくつかは既に廃水処理を講じているようであるが、JICAの調査はより大きな包括的なもので、問題はないと思うが24日にチェックすると述べた。

この後、先方より以下の科学技術省の基本ポジションについて説明があった。

現在、National Research Programmesというものがある。

これは、スロベニアの国家的要請を各セクター毎に分類したもので、運輸、保健、農業等についてResearchすべき事項を列挙している。環境については、環境省との共管であり、このプログラムも両省共同で作成された。7年計画で環境モニタリング、汚染対策、Social Impact Assessment等も含んでいる。

すべてのリサーチのプライオリティーは環境省が行い、予算措置は科学技術省、環境省は半分ずつ負担することとしていたが、予算的には我が省がその大部分を負担している。

2年前、イカロス計画に基づき環境省が廃棄物に関するプロジェクトを作ったが、実施されなかった。環境問題に関しては、研究段階は科学技術省が行うが、直面する緊急性の高い問題については、マリボル市のように他機関による取り組みを必要とする。

更に、ベンコ女史より以下の発言が続けてあった。

現在、スロベニア開発戦略策定のために、長期的開発目標をMulti-annual approachの手法で作成されたリストを準備中である。

これは、9月中旬に公開される予定であるが、スロベニアにとって各種セクターで必要とされるニーズのリストであり、それに基づき各国の支援を求める予定である。

日本については、運輸、環境分野について時間はかかったものの協力の意志が表明されている。

今後、日本として、どのような分野に協力できるのかを承知したい。

これに対し、高橋団員より以下の発言があった。

日本としては、東欧については基本的に環境、市場経済化支援の分野について技術協力、及び資金協力を行っている。

スロベニアの状況を鑑みる時、環境分野の技術協力に限定されるものと思料する。Multi-annual approachのリストについては、我が方とスロベニアのプロジェクトサイクルに不整合が生じないように、前広に情報提供願いたい。

最後に先方より、鉱工業分野に関してはBusiness innovation centerの設立を通じて中小企業振興を行うとともに、Technological parkの建設による技術者養成に力を入れている。

4. マリボル市公共サービス局

日時 5月23日

参加者 Head of the department Dr. Vesna Smaka-Kincl 他2名
Rehabilitation Programmes Group Mr. Ivo Kresnik
調査団全員

協議概要：

冒頭、スマカ局長より以下の内容の説明があった。

当市では、EBRDの計画で地下水システムの構築を進めており、企画・設計はIEIという研究所に依頼している。

また、当該施設の北西部に位置する3ヶ所の工場群の排出量はマリボル市全工場の排水量の80%を占めている。

こちらの排水路については、当市において改修済である。また、南部については、今後の計画を現在検討中である。

調査団の主たる質問とそれに対するマリボル市側の回答は以下の通り。

質問：北西部水路を流れる水の水質について

この水路は現在一系統のため汚水と雨水をミックスしているが、将来二系統にして両者を分離する計画である。

質問：水路はオープンタイプか

クローズドタイプである。

質問：工場廃水の前処理は行っていないのか

いくつかの規模の大きい工場では行っているが、その他中小規模の工場では前処理を行っていない。理由は当該地域における中小企業にとっては、自工場内に処理施設を設置するのは経済的でないと考えている。

質問：前処理をしない工場では川に直接排水しているのか。

その通りである。当市では、社会主義時代の古い基準があるが、順守されないことも多かった。しかし、今年7月、あるいは8月（環境省によれば9月）新しい排出基準ができる見通しであり、それに合わせて工場の廃水についても対処したいと考えているところである。

5. I E I (Institute of Ecological Engineering)

日時：5月23日 I E I 会議室

参加者：Engineer Dr. U. KRAJNC

調査団全員

協議概要：

冒頭、I E I 側より以下の説明があった。

マリポール市の主要産業としては、①テキスタイルの5大工場 ②ビール、ワイン、ミルクの食品関連製造工場 ③化学工場 ④金属加工業等があげられる。

当市では、工場の排水の概要を把握するための調査を三期に分けて行った。

調査内容は企業規模（従業員）、生産プロセス、製品、水消費、排水濃度等があげられる。この調査の対象工場は大規模工場で、25（第一期調査：10、第二期：10、第三期：5）あり、これら25工場の排水量の合計はマリポール市全工場排水の80%を占める。

これら25工場のうち工場内に処理施設を備えているのは、5工場に過ぎない。従って、残り20工場の処理施設が必要となってくる。

マリポール市にはこれら25工場より規模は小さいが、合計すると全工場排水の約20%を占める工場が約100あり、これらのうち幾つかは前処理が必要と思われる。これら以外の約3000の零細企業については、無視できるものと考えられる。

以下、調査団からの質問とそれに対する回答は以下の通り。

質問：水使用の合理化進んでいるのか。

回答：進んでいない。なぜならば、当市では水が安いからである。

（上水道の料金は市場経済化の前に比較し7倍になったが、それでもまだ安い。しかし、今後更に料金が上がるにつれて、節水という概念が出てくるであろう。

質問：上述の25工場を対象とした調査では、どのような前処理を行うべきかの具体的、技術的勧告は行っているのか。

回答：マリポール市にある工場の排水の現状を把握するのが調査の目的であり、工場単位で必要と思われる前処理の手法については検討していない。

団長所感

1) スロベニアの経済は順調に回復してきている。国営企業の経営不振の中で、中小企業の活躍、観光、サービス収入の増加による経常収支の黒字等が特に目立つ動きである。

2) 中小企業は、社会主義下で国営企業に集約化されずに残ったもの、国営企業の分社化によって生まれたものの他に、家族経営的なものや新たに商機を捕らえて生まれたもの等が次々に誕生し、国営企業の不振による穴を埋めている。

3) 中小企業政策の中には、新たに市場経済に転換した国々の中では特に優れた要素が含まれて居る。金融、債務保証等の産業金融や、税の軽減等の優遇措置の他、専門の経営指導者による経営管理、マーケティングの指導や、技術指導、新技術の紹介などが行われたり、また諸機関による情報提供が行われている。

中小企業振興のために派遣された田辺専門家の活動は、当地で高く評価されており、この分野での専門家の派遣による協力の余地は大きいものがあると思われる。

4) マリボル市の工場廃水事前処理計画は、同市の下水処理計画に大きな貢献をなすものと思われる。

95年9月頃に実施される排水基準を満たさない25社中の20社（同市の廃水の75%は工場廃水であり、25社で工場廃水の80%を占める。）の事前処理計画の策定は、計画されている中央下水処理施設の負荷を軽減するのみならず、グニューブ川流域の浄化のための行動計画を実効あらしめるものとなる。

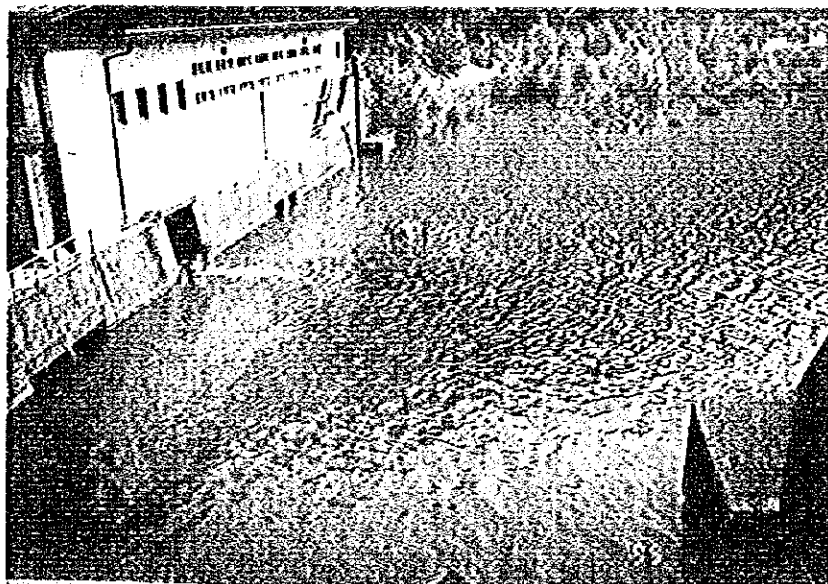
また、この事前処理計画は、同市が開始予定のEBRDとのコンセッション方式による主要排水管及び中央下水処理施設の設置計画とは競合しない。

従って本件は、緊急の課題であり、次のミッションが7月中旬頃来るのであれば、夏休みを返上し、ミッションの作業に協力したいとの申し出もあるので、その線に沿ってプロ形又は予備調査団を、その後早期にS/Wミッションを派遣することが成果を上げるための重要な要素となろう。

また、本調査の事前処理計画の内容として、低コストで新基準を満たす装置をリコメンドすることは勿論であるが、水使用の合理化計画の内容をも含めるとともに、工場の水の排水管理、検査及び市当局の検査等廃水の管理指針、運営管理等を含めることがマリボル市の期待にかなうものであり、それを大いに期待しているように思われる。

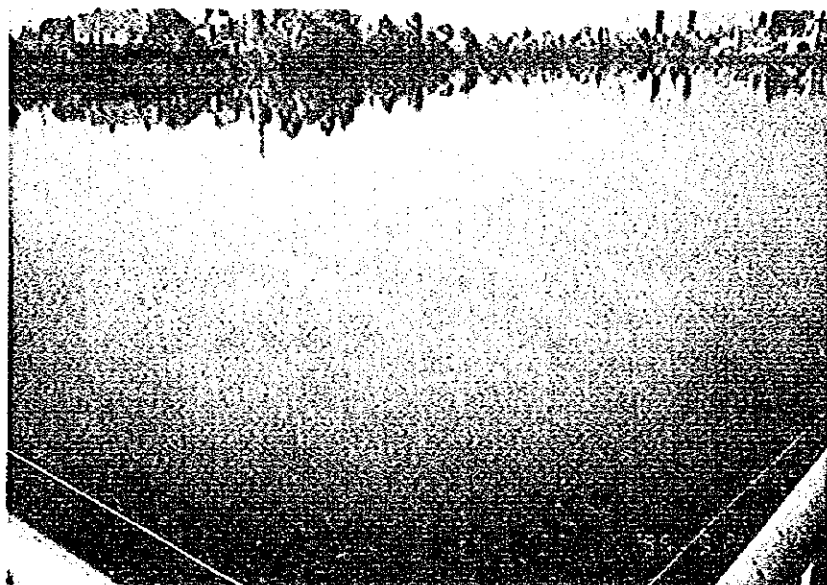
以上

Maribor 市産業廃水予備処理：ポンプ場写真



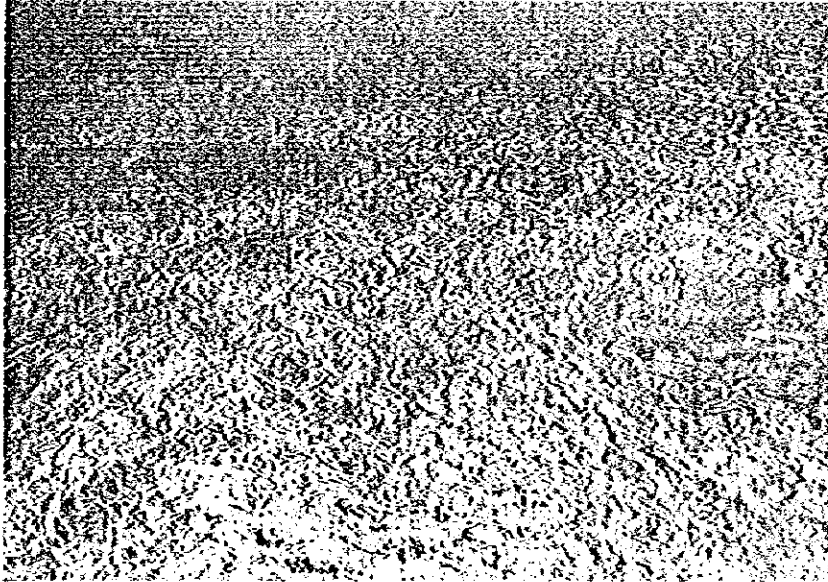
通常、工場廃水は一応何らかの処理を施しているものだが、この染料工場は未処理のまま、汚水を流している。

この日はたまたまポンプアップ用の発電設備が故障しており、通常なら運河を通して発電用水として使用される水が、その未処理の状態ですべてポンプ場から排水されているため、青色の汚水（染色後のものと思われる）がドラバ川へ直接流されていた。



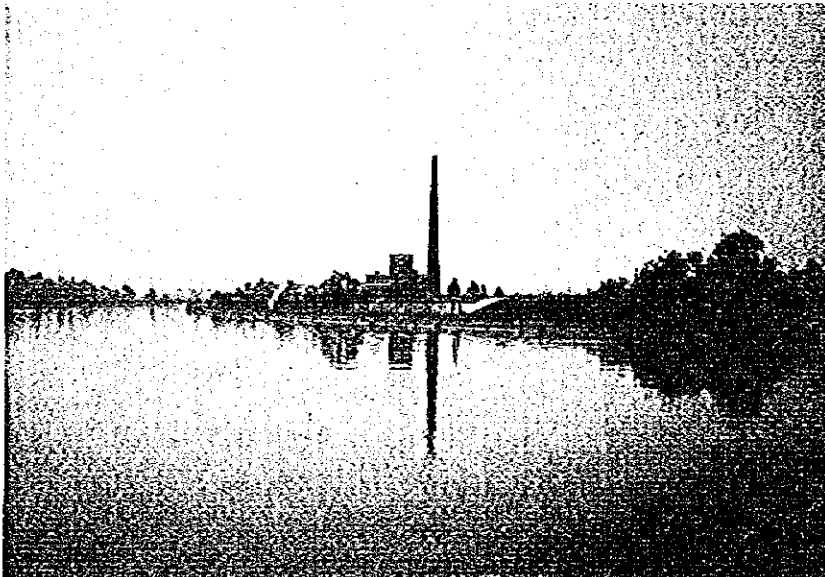
ドラバ川ポンプ場水門の前のよどんだ様子。

川が緑色に変色し、COD≒0の状態になるほど汚染が進んでいる。



水門を解放してエアレーションした様子。

汚染が進んでいる為、川底に汚泥がたまっており、水門を解放した時、その汚泥が巻き上げられて、茶色に変色している。



ポンプ場においては、対岸に見える運河を通して発電用水を供給する為、一部ポンプアップしている。

Ⅶ. 面会者リスト

1) ポーランド

- a. 日本大使館 大使：兵藤 長雄 公使：成田 右文 一等書記官：中村 稔
二等書記官：平良 和史、菅 篤則

(以下、ポーランド側関係者)

- b. 閣僚会議府 Associate Professor Director Ph.D. T.ZOLTOWSKI
Directorate Science, Environment Ph.D. B.MROWKA
- c. 商工省 Director B.KOWALAK
Advisor to the Minister J.ZOLEDZIOWSKA
Chief Specialist S.Zimmer
Chief Expert M.Kulig
- d. 民営化省 Director: Department of Foreign Relations A.WASK
Vice Director: Department of Foreign Relations A.RYNG
- e. 環境省 Deputy Director K.SOBKOW
Vice Director S.KAMINSKI
- f. "WIZOW" S. A. (Chemical) Vice Director T.SZMIGIEL
- g. PZL-MIELEC" ENGINES CO. Ltd
Research and Commercial Director J.WILK
Marketing and Export Manager R.Kepka
Production and Purchase manager J.Madry

2) スロベニア

- a) オーストリア日本大使館 参事官 太田 清和 一等書記官 安沢 隆男
- b) 経済省 State Secretary of Small Business S.BALOH-PLAHUTNIK
Counsellor to the Minister S.GABERC
- c) 環境省 Rehabilitation Programmes Group I.KRESNIK
- d) 大蔵省 Advisor to the Government T.SVAJGER
Resident Advisor to the Monitoring Unit (EU/PHARE) S.W.WINCKEL
- e) 科学技術省 Director Department of International Cooperation Dr.S.BENKO
Counsellor to the Government M.KOMAC
- f) マリボー市公共サービス局 Vice Mayor V.Lapuh
Head of Department V.SMAKA-KINCL
Advisor Dr.V.PREMZL
- g) I E I (Institute of Ecological Engineering) Engineer Dr.U.KRAJNC
- h) MARLES (木材加工・住宅建設) Development Researcher Technologist Mrs M.BRACIC
- i) JICA オーストリア事務所 中村所長

Ⅳ. ポーランド・スロベニア：プロジェクト選定確認調査収集資料

ポーランド：

- 1) 企業リストラクチャリングパンフレット
- 2) ISSUES AND OPPORTUNITIES OF ENERGY
RESTRUCTURING IN POLAND
- 3) NATIONAL ENVIRONMENTAL POLICY
- 4) POLAND: INVITATION TO INVEST
- 5) PRIVATIZATION (MINISTRY)
- 6) BUDUJEMY Z GIPSU
- 7) UTYLIZACJA GIPSU SYNTETYCZNEGO
- 8) 排煙脱硫・脱硝装置の現状
- 9) 安全の手引き (JOCV事務所作成)
- 10) 資料余部
- 11) 「INDUSTRIAL POLICY PROGRAMME: '95~'97」
- 12) 「POLICY TOWARDS SMALL AND MEDIUM SIZED
ENTERPRISES」

スロベニア：

- 1) マリボル市産業廃水予備処理 (地図・工場配置図・現地調査工場資料)
- 2) EBRD: INCEPTION REPORT (DANUBE BASIN)
- 3) マリボル市：産業廃水処理条例、プロジェクト概要
- 4) スロベニア：マクロ経済トレンド
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* 「The Environmental Protection Act」

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* 「Industrial Wastewater Pretreatment
Project in Maribor」 Summary

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MINISTRY OF INDUSTRY AND TRADE

**"INTERNATIONAL COMPETITIVENESS
OF THE POLISH INDUSTRY"
INDUSTRIAL POLICY PROGRAM
FOR THE YEARS 1995 - 1997**

(document adopted by the Government of the Republic of Poland on May 16, 1994)

Warsaw, April 1995

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OUTLINES OF PROGRAM

(adopted by the Economic Committee of the Council of Ministers on December 19, 1994)

I. THE NEED AND BASIS FOR PREPARING THE PROGRAM

Polish enterprises have to adapt to the growing national and foreign competition. Hence, state policy with respect to industry should provide a stable operating environment and opportunity for structural change ensuring innovation and modern production profile. This is needed in the light of liberalizing international trade and the Association Agreement with the European Union.

"The Industrial Policy Program For The Years 1995-1997 'International Competitiveness of the Polish Industry'" is rooted in:

- *"Strategy for Poland" adopted by the Council of Ministers on June 7, 1994, and in particular its keynote program "International Competitiveness of the Polish Economy";*
- *"Industrial Policy Objectives" adopted by the Council of Ministers on September 14, 1993.*

II. OBJECTIVE OF THE PROGRAM

The objective of the industrial policy program covering 1995-1997 is to obtain better international competitiveness of the Polish industry and secure economic growth in an open economy environment.

In meeting this objective, the Government shall:

- support the workings of market mechanisms as the force for allocating resources in the economy;
- create conditions conducive to improved efficiency, technical progress and innovation;
- support industrial restructuring;
- recommend application of eco-development rules in the industry.

III. THE PRESENT CONDITION OF THE POLISH INDUSTRY

Growth trends in industrial output consolidated manifestly in 1993 and 1994. Increased demand in the domestic market was the main force behind the 1993 recovery in production. Compared with earlier years, 1993 saw a marked drop in industrial exports. Imports continued to grow dynamically and foreign competition in the Polish market increased. Exports picked up pace in 1994, outpacing the growth of imports and domestic demand.

Modest, but nonetheless positive, changes took place in the structure of industry, namely an improvement in the share of manufacturing industries, including high-tech industries. The share of new and modernized products also

increased. However, restructuring processes did not encompass the large enterprises to a satisfactory degree.

Expenditures on Research and Development were still rather low. Investment outlays also remained low.

The financial situation of enterprises continues to be very difficult. A high level of liabilities and scarcity of liquid assets of companies constrain the possibilities of investment financing. The volume of the industry debt was twice the sum of receivables and reached the value of six months' production.

Environment protection issues are being addressed successively. In spite of this, the industry still remains a major liability for the environment.

The situation in the industry was described in details in "The Report on the Condition of the Polish Industry in 1993".

IV. ESSENCE OF THE PROGRAM

IV. 1. GENERAL DESCRIPTION OF THE PROGRAM

On the basis of the "Industrial Policy Objectives", the program approaches policy from the point of vantage point of specific issues, sectors and, to some extent, regions.

The idea of the **issue-oriented (horizontal) approach** is to address the problems common to all branches of industry, with focus on formulating and applying the appropriate legal, organizational, economic, and program measures.

The idea of the **sectoral approach** is the restructuring of enterprises that have developed technological or organizational ties with each other, or enterprises selected in some other way, upon criteria individual for each group called a sector.

The idea of the **regional approach** is the integration of industrial policy with the economic strategy of regions with high concentration of industry, as well as of cities dominated economically by one big industrial plant.

These approaches interact in the following areas:

- policy of export orientation (mainly the issue-oriented approach);
- technology policy (mainly the issue-oriented approach);
- structural changes (mainly the sectoral approach).

These are the priority directions of Government strategy, highlighted in the Program of Industrial Policy for 1995-1997 "International Competitiveness of the Polish Industry".

IV.2. DIRECTIONS OF OPERATION

IV.2.1. Policy of export orientation

Under the "Objectives of the Export-Oriented Policy" adopted by the Government on September 14, 1993, and "The Schedule of Activities Aimed at the Implementation of the Export-Oriented Policy of the State" adopted by the Economic Committee of the Council of Ministers (KERM) on May 18, 1994, its prime target is to leverage Polish economic growth primarily by accelerating exports, and turn this into a sustainable trend.

The Government proposes the following measures for export promotion:

- Financial instruments developed through creating the appropriate institutional infrastructure of insurance and government guarantees of export contracts as well as tax incentives, which will require, i.e.:
 - bolstering the financial base for KUKE (Export Credit Insurance Corporation);
 - adopting laws on insurance of export contracts guaranteed by the State Treasury, as well as on subsidizing bank interest rates in export financing credits;
 - applying other financial policy instruments to boost exports within the scope of permitted "state assistance".
- Information and organizational instruments, i.e.:
 - monitoring of the enterprises with high share of exports in their total sales or scoring fast export expansion, in order to select the entities most eligible for inclusion in export promotion schemes, as well as pursuing an active information strategy addressed to banks, potential investors and enterprises;
 - efforts to increase participation of Polish enterprises in international supplier arrangements..
- Promotion of foreign trade by the means permitted under the Association Agreement between Poland and the European Communities and GATT/WTO regulations.

The principles of an acceptable state assistance shall be regulated in accordance with the European Communities practices, GATT/WTO and OECD regulations in this respect.

IV.2.2. Technology policy

The objective of technology policy is to improve technological standards of industry. It implies, e.g. the necessity of selecting the priority directions of research and applying a system of support for certain technological fields, as well as legal and system regulations.

The technology policy of the state is centered around:

- assistance in providing necessary information and training in the area of modern technologies, in improving co-operation between industry and research and development facilities, as well as in improving the quality of products and promoting the best national practices;
- implementation of programs aimed at adaptation to regulations and standards of the European Union, including quality systems (certificates and

attestation), increasing international co-operative arrangements (in production, funds and research);

- introduction of "clean production" rules into production and development programs of enterprises;
- applying a special system of organizing and implementing support for small and medium enterprises in their access to technology;
- providing an appropriate institutional infrastructure – creating a Technology Agency to promote development and application of modern technologies (including eco-friendly technologies) in industry, expanding operations of the Energy Conservation Agency and regional development agencies;
- implementation of formal, legal, organizational, and financial instruments defined in "Objectives on the Pro-Innovation Policy of the State" adopted by the Council of Ministers on November 22, 1994,
- supporting close links between science and industry by, for example, a system of project and commissioned research and strategic development programs;
- pursuing an investment-promotion policy, focused on creating advantageous conditions for:
 - modernization of plant and equipment;
 - intensification and modernization of the structure of research, development, and implementation efforts;
 - renovation and modernization of the product range;
 - encouraging foreign investment in Poland.

IV.2.3. Policy of structural changes

The policy of structural changes shall be expressed through:

- successive commercialization and privatization of enterprises;
- changes in industry structure;
- guiding development in regions with high industrial concentration;
- internal restructuring of enterprises.

IV.2.3.1. Commercialization and privatization

The process of changing the ownership structure of enterprises is aimed at improving economic efficiency. It shall be pursued in forms and scope appropriate to securing entrepreneurship and innovation. It should provide better access to the international investment capital needed for modernization of Polish industry. Government privatization policy will take due account of the sectoral aspect of industrial policy.

In parallel with privatization conducted in a variety of forms, state-owned enterprises will be commercialized, i.e. transformed in their legal form into commercial companies, with modern forms of management (management contracts).

Commercialization of the entire SOE sector will:

- eliminate the double-standard of law and offer equal terms for all, irrespective of ownership form;
- hasten the process of ownership transfer and organizational change.

IV.2.3.2. Changes in industry structure

In order to increase the share of high-value manufacturing industries in total output, the Government will focus its action program on:

- mechanisms stimulating development of small and medium enterprises, through introduction of new legal, organizational and financial schemes, as well as extending wider institutional assistance in securing access to skills and expertise, modern technologies, new markets, and capital resources. The SME sector should provide the sub-supplier and service backing for large industry and serve as the venue of intensive innovation. Small companies should become significant suppliers of export goods and services.
- continuation of sector restructuring, especially in the field of:
 - sectors decisive for energy and defense security of the country, with a view to sustainability and higher economic efficiency, addressing the present unemployment concerns;
 - high opportunity sectors, including the industries decisive in shaping a modern structure of the economy.

The following programs have been endorsed by the Council of Ministers for implementation 1995-1997:

- o Restructuring Program for the Iron and Steel Industry (through 2002)
 - tailoring the present production capacities to true market demand;
 - increasing to at least 90% the share of output produced by the continuous casting method;
 - down-sizing employment, reducing labour intensity and adverse environmental impacts.
- o Proposals for Restructuring Programs in Hard Coal and Lignite Mining, Gas and Power, District Heat and Liquid Fuels Industry

Hard coal mining:
(second stage of the restructuring program covering 1994-1995, third stage - through 2000 under preparation):

 - sustained profitability of the coal industry and international competitiveness of Polish coal;
 - reducing harmful impacts on the environment,

Power industry:

 - switch to market rules of enterprise operation;
 - integration of the Polish power grid with the Western power system;
 - provision of alternative sources of power supply in order to stabilize the energy security of the country;
 - reduction of pollutant loads released into the environment.

Oil sector:

 - attaining an internationally competitive standard of the oil sector.
- o Restructuring Program for the Pharmaceutical Industry
 - attaining internationally competitive standards, so as to increase export and domestic sales (i.a. matching GMP standards),
 - creating conditions for self-financing to enable development and modernization.

The following programs are being reviewed in the Economic Committee of the Council of Ministers (KERM) for implementation:

- Government Policy Package To Secure a More Competitive Shipbuilding Industry
 - achieving profitable production;
 - improving industry competitiveness;
 - adjusting Polish shipbuilding enterprises to the operating environment of OECD and European Union countries.
- Restructuring Program for the Non-ferrous Metal Industry
 - continuation and improvement of international competitiveness;
 - creation of conditions for self-financed development and modernization,
 - reduction of harmful impacts on the environment.
- Restructuring Program for the Defense Industry (to be discussed by the Defense Committee of the Council of Ministers):
 - adjusting the production potential to projected requirement as set out in the national defense doctrine;
 - defining the proper format for functioning of the defence and aircraft sector in a market economy;
 - conversion of redundant defense materiel production capacities to civilian production.
- Restructuring Program for the "Heavy Chemistry" Sector
 - adjusting this sector to the changed market environment (demand structure of other industrial branches, agriculture, construction industry and others), as well as intensification of profitable exports;
 - decreasing energy and material intensity of production;
 - adapting industrial plants of the sector and quality of final products to ecological requirements.

Furthermore, programs to develop the national technical infrastructure: motorway construction, a national system of domestic and transit gas distribution, telecommunications and railways will be pursued as part of the overall industrial development package. Efforts aimed at preparing Polish enterprises for participation in these programs put emphasis on information concerning the technological requirements and quality standards, as well as the promotion of offers from domestic service and goods providers.

IV.2.3.3. Guiding development in regions with high industrial concentration

Under "Provisions of the State Regional Policy" adopted by the Council of Ministers on July 12, 1994, the main focus in this respect will be on:

- more effective operation of the institutions involved in carrying out industrial policy measures on local and regional levels;
- supporting development of the small and medium enterprise sector;
- correlating governmental restructuring programs for individual sectors with regional economic programs;
- establishment of the special economic zones.

IV.2.3.4. Internal restructuring of enterprises

Government efforts to secure internal restructuring of enterprises are focused primarily on the following fields:

- shaping the legal framework required for financial, organizational and technical restructuring,
- providing organizational and financial assistance channelled through extra-governmental organizations, such as the Industrial Development Agency, the State Foreign Investment Agency, regional development agencies, etc.;
- accelerating the liquidation process of structurally loss-making entities.

V. PROJECTED BENEFITS OF THE PROGRAM

V.1. BENEFITS TO THE SOCIETY:

- employment restructuring;
- increased economic activity;
- improved quality of life;
- improved quality of the environment.

V.2. ECONOMIC BENEFITS

- increased industrial output;
- increased exports;
- higher quality of Polish products;
- improved condition of enterprises;
- development of the SME sector;
- increased investment;
- more spending on R&D;
- better structure of industry;
- rationalized use of natural raw materials;
- development of technical infrastructure.

V.3. FINANCIAL BENEFITS:

- higher revenues for the budget;
- higher savings;
- more efficient use of assistance funds and foreign credits.

V.4. LEGAL BENEFITS:

- organizational changes in the central administration;
- legislative changes (the list of legal acts regarding the industrial policy is enclosed).

**INDUSTRIAL POLICY PROGRAM
FOR THE YEARS 1995 – 1997**

**"INTERNATIONAL COMPETITIVENESS
OF THE POLISH INDUSTRY"**

INTRODUCTION

For the three past years we have observed an economic growth, the main source of which was an outcome of industrial activity, marked not only by the biggest share in creating national gross product in comparison to other economic sectors, but by the highest dynamics as well. The impact of Polish industry on the economic development of Poland will be highly dependent on the success of the ownership, organizational, legal, financial and technological transformation process, going on for several years. Further economic growth is relied mainly on the effects achieved in competition on the international markets. The dynamics of production and exports shall be determined chiefly by the competitiveness of Polish industry comparing to the foreign products and manufacturers.

Competitiveness of the economy -- means its ability to produce and offer goods and services of such technical and functional parameters, at such quality and price level and on such terms of sale, that will find buyers both in the domestic market, as well as on the foreign markets. International competitiveness of the Polish industry -- means ability of the enterprises to compete in the open market circumstances.

The internationally competitive industry is characterized by: efficient organizational framework and modern management systems, suitable level of production concentration, its linkage with the development and marketing research area, computerization, flexibility of the production processes, aptitude for continuous improvement, accessibility of the technical infrastructure and highly qualified staff. Typical for it is also a parallel co-existence of companies with high financial and production concentration, including holdings and corporations (with participation of foreign capital) surrounded by small and medium businesses.

Industrial policy of the Government within the next years shall be focused on the three major issues: export-oriented policy, technology policy and policy of structural changes -- according to the Objectives of the Industrial Policy Program for the Years 1995-1997 "International Competitiveness of the Polish Industry" -- adopted by the Economic Committee of the Council of Ministers /KERM/ (December 19, 1994). This document sets out a choice made from a range of multi-directional actions referred to in the document "Industrial Policy", adopted by the Council of Ministers in September 1993, the main section of which "Objectives" -- covers a ten-year period. The herein program of improvement of international competitiveness of the Polish industry in the years 1995-1997 is concurrent with priorities of the economic development set forth in the "Strategy for Poland" and results directly from the X keynote program "International competitiveness of the Polish economy". Its realization is aimed at supporting maintenance of the economic growth within the next years, at least at a 5% annual level.

Competitiveness of the industry shall be achieved in result of the enterprises activity. Only the companies may reinforce their chances and win the bigger market share, through their activity and flexibility in choosing and consequently bringing into effect the appropriate strategies. The Government's role is to create conditions encouraging the enterprises to maintain high level of activity, facilitating research and realization of the prospectively efficient projects, indicating the key role of exports, innovation and changes in production structure. In this respect, one of the major tasks is to introduce strictly commercial and stabilized rules of operation for the enterprises, along with reinforcement of the infrastructure for operation of the small and medium business sector.

The "International Competitiveness of the Polish Industry" Program indicates, first of all, these possibilities of the central economic management, which while addressed to the industrial enterprises, should make them strive after improvement of their own competitiveness and ought to make them believe, that increased competitiveness and adaptation to the requirements of the European Community and GATT/WTO is unavoidable and urgent necessity. The "Objectives of the Program ..." adopted by KERM set forth priorities of the industrial policy for the next years, general goals and pursuits and the expected effects of their realization. The Program, prepared in accordance with the aforementioned objectives, specifies the pursuits for separate sectors and government authorities in organizational, legal, financial and promotional respect. It determines the goals to be achieved, scope of responsibility, due dates for realization and estimation of the necessary financial expenditure of funds at the Government's disposal, required for realization of the "Program...". The enclosure presents, in a standardized form, information on studies and sectoral programs, prepared and controlled by the Minister of Industry and Trade. Their realization will stipulate improvement of the enterprises competitiveness through restructuring of the industry infrastructure and development of the "high opportunity" sectors.

Despite many difficulties, the dynamics of sales growth in the Polish industry is high. Therefore, it is necessary to maintain it in long term by means of industrial policy, creating favourable development conditions for the enterprises, so that they increase their efficiency, thus becoming equal partners for the foreign competitors. This policy is reflected in the "International Competitiveness of the Polish Industry" Program.

Realization of the Program is controlled and supervised by the Minister of Industry and Trade (in the future: Minister of Economy), and responsibility for carrying out the specific tasks lies with the ministers or directors of the extra-governmental organizations listed on the first place.

SECTION I ACTIVITIES AIMED AT IMPLEMENTATION OF EXPORT-ORIENTED POLICY IN THE INDUSTRY

Introduction

According to the "Objectives of the Export-Oriented Policy" - adopted by the Government on December 14, 1993 and "Strategy for Poland", a dominant role in ensuring the economic growth is attributed to export production, which is assumed to increase within the period of next four years by almost half as much as a projected growth of GNP at a 22% rate. It should be also mentioned, that currently the industry supplies over 80% of total export volume of our country. Hence, it is competitiveness of the industrial offer that determines Polish share in international labour division.

Most of the export stimulating mechanisms have been already working. The exporters apply zero rate of VAT /tax on goods and services/, they are entitled to refund of customs duty, import tax, VAT and excise assessed upon purchasing of production components. They may enjoy investment allowances in income tax. The system of guarantees and securities financed from the state budget is already functioning in credit practice. The insurance system of export contracts guaranteed by the State Treasury has been impelled and it has been allowed to consider an insurance policy as a form of pledge for the bank credits. The exchange rate remains an important export stimulant. The principle of realistic changes of rates should become a requirement in the exchange rate policy, i.e. the range of adjustments should be appropriated to the inflation rates. Otherwise, the pro-export merits of the exchange rate shall be diminished and the import tendencies shall be intensified.

The above mentioned instruments will function as well during the period of realization of the "PROGRAM...", which will be reflected e.g. in providing budgetary means in the form of guarantees and securities quota for consecutive years. Additionally the "Program.." refers to supportive measures extending the presently available package of instruments. The primary tasks in this respect have been specified in compliance with the implementation schedule of the export-oriented state policy, adopted by KERM on May 18, 1994.

The below mentioned action program includes proposals of additional export supporting measures in the Government's economic policy. They have been divided into three basic groups:

- I. Financial instruments
- II. Information and organizational instruments
- III. Instruments of the foreign trade policy.

Objective - to make the high export dynamics a determinant of the economic growth in Poland for the years 1995-1997.

I. Financial instruments

Realization procedure:

1. Legal regulation of issues related to the acceptable state assistance, and particularly the principles of rendering such assistance under the legislation of EC, GATT/WTO and OECD.

Responsible person: Chairman of the Anti-Trust Bureau. Appointment of the inter-sectoral committee is necessary.

Due date: second half of 1995.

2. Providing within the state budget a quota for export contracts insurance, on the grounds of the law on insurance of export contracts guaranteed by the State Treasury, dated July 7, 1994.

Responsible persons: Minister of Finance in agreement with the Minister of International Economic Co-operation.

Due date: each year in the draft of budget law.

3. Working out the principles and procedure of granting subsidies for interest on certain bank loans (including those allocated for export financing) - as an executive act to the law on subsidies for interest on selected bank loans, dated January 5, 1995.

Responsible persons: Minister of International Economic Co-operation in agreement with the Minister of Finance and Minister of Industry and Trade.

Due date: first half of 1995.

4. Amendments to the Council of Ministers decree dated January 25, 1994 regarding deductions of investment expenditure from income and reductions in income tax, aimed at alleviating the conditions of available tax reductions.

Responsible persons: Minister of Finance in agreement with the Minister of Industry and Trade and the Minister of International Economic Co-operation

Due date: first half of 1995.

5. Preparation of the standardized criteria system allowing for granting tax reductions and exemptions for the strategic domestic and foreign investors, who carry out export-oriented investment projects, in compliance with the compulsory GATT/WTO regulations.

Responsible person: Minister of Industry and Trade, Minister of Finance,

Due date: 1995.

Reasoning

On February 1, 1994 European Treaty came into force, instituting association of Poland with the European Communities and their member countries. According to article 63.4a the whole Polish territory has been deemed an area of particularly low standard of living for the period of five years from the date of coming the Treaty into force. Therefore, upon meeting certain conditions, rendering of the so-called acceptable state assistance in our country shall be admitted during this period. The set term may be prolonged for further five years. In this view, legal regulation of the issues related to acceptable state assistance is essential, as well as negotiating such interpretation of principles for implementation of the state assistance for public projects that would be beneficial for Poland.

With respect to adapting Polish economy to the circumstances of market-oriented environment, state assistance shall become an important element of the industrial policy.

In regard of export support the dominant role shall be played by adequate taxation and credit policy and creation of the necessary institutional infrastructure related to government insurance and guarantees of export contracts. Subsidizing from the state budget the Export Credit Insurance Corporation in 1994 was a step ahead in this domain, similar as passing in the Parliament the laws on export contracts insurance guaranteed by the State Treasury and subsidies for interest on selected bank loans.

II. Information and organizational instruments

Realization procedure:

1. Preparation and implementation for the central economic management of the information system on export situation, from the point of view of changes in its geographical structure and commodity structure in individual markets.

Responsible persons: Minister of the International Co-operation, Customs Head Office.

Due date: quarterly studies commencing from 1995.

2. Preparation and implementation of the system for monitoring the enterprises sensitivity to the changes in economic and financial instruments, with regard for the most export-oriented enterprises of highest export dynamics.

Responsible person: Minister of Industry and Trade.

Due date: pooling in the first half of 1995, quarterly studies commencing from 1996.

3. Performing periodical studies on competitiveness of Polish products in the foreign markets.

Responsible persons: Minister of International Economic Co-operation in agreement with the Minister of Industry and Trade.

Due date: once a year.

4. Establishment of the information system for the economic entities, regarding terms of trade and access to foreign markets and preparation of the guidebook on the terms of public orders in the EC countries.

Responsible persons: Minister of International Economic Co-operation, the National Chamber of Economy.

Due date: first half of 1995.

5. Amendments to the Decree No. 40 of the Minister of Foreign Affairs dated September 10, 1984, regarding operation of the economic and commercial offshore Government agenda aimed at intensification of Polish economy promotion and export growth.

Responsible persons: Minister of Foreign Affairs, Minister of International Economic Co-operation, Minister of Industry and Trade.

Due date: 1995.

6. Working out a concept for making Poland a transit territory in the trade turnover between East and West, North and South and an attractive intermediary between the Eastern and Western countries.

Responsible persons: the Minister - Director of the Central Office of Planning in co-operation with the Minister of International Economic Co-operation and the Minister of Foreign Affairs.

Due date: 1995.

7. Preparation of the guidebook on legal terms and administrative regulations related to the process of investing foreign capital in Poland.

Responsible persons: Minister of the Ownership Transfers, the State Foreign Investment Agency.

Due date: 1995.

8. Establishment of the monitoring system for industrial investment projects undertaken by the foreign capital in Poland and creating system of supporting regard to the issues of the equipment and machinery modernization, production range structural modernization and environmental protection in the plans of export-oriented investment projects and foreign contracts.

Responsible persons: Minister of Industry and Trade, Minister of the Ownership Transfers, the State Foreign Investment Agency.

Due date: 1995.

9. Supporting the search for source of financing for the significant investment projects promising export growth, by means of investment funds or bank consortiums.

Responsible persons: Minister of Industry and Trade in agreement with the banks and bank consortiums.

Due date: commencing from 1995.

10. Promotion of the financing of the investment projects particularly important for the industry restructuring process, by means of:

- issuing the Ministry of Industry and Trade opinion, upon the banks motion, on compliance of the given investment project with the industrial policy objectives, including the sectoral programs,
- organization of consulting and aid in export-oriented initiatives,
- preparation of the special program addressed to the small and medium business (see p. II.1. in section III of the "Program...").

Responsible persons: Minister of Industry and Trade, Industrial Development Agency, Polish Foundation for Promotion and Development of Medium and Small Business (after its founding).

Due date: commencing from 1995.

11. Advisory support for small and medium businesses undertaking export activities (see p. II.1. in section III of the "Program...").

Responsible persons: Minister of Industry and Trade, Polish Foundation for Promotion and Development of Medium and Small Business (after its founding) in co-operation with regional development agencies..

Due date: commencing from 1995.

12. Organization of training for the companies, which are leaders of Polish exports.

Responsible persons: Minister of Industry and Trade, Industrial Development Agency, Polish Foundation for Promotion and Development of Medium and Small Business (after its founding), Polish Center of Productivity.

Due date: commencing from 1995.

Reasoning

The scarcity of financial means from the budget and from the aid funds, as well as economic situation of the enterprises, who have not at their disposal sufficient investment capitals, may prove that the information and organizational instruments will be very efficient. They must comply with the market-oriented economy rules. A starting point for creation of these instruments should be establishment of the industry monitoring system, which would provide necessary information and make basis for strategic decisions in the scope of the economic policy priorities. In the beginning, it should encompass the enterprises of high export-orientation.

III. Instruments of the foreign trade policy

Realization procedure:

1. Preparation of the alternative concepts and solutions regarding the schemes and instruments for bilateral clearing of accounts with the Eastern and Baltic countries.

Responsible persons: Minister of International Economic Co-operation, Minister of Finance. Appointment of the inter-sectoral committee is necessary.

Due date: first half of 1995.

2. Concluding agreements on economic co-operation and trade with those Eastern and Baltic countries, that have not signed such agreements yet.

Responsible persons: Minister of International Economic Co-operation in co-operation with the relevant ministers.

Due date: through the end of 1995.

3. Concluding long-term agreements on supplies of commodities strategical for Polish economy.

Responsible persons: Minister of Industry and Trade in agreement with the relevant ministers.

Due date: during the period till 1997.

4. Preparation of the Customs Code adapted to the European Union Code and the GATT/WTO regulations, with simultaneous improving of the refunding system of customs charges levied upon the raw materials, materials, semi-products and components used for production of export goods.

Responsible person: Minister of International Economic Co-operation.

Due date: first half of 1995.

5. Continuation of the scheme allowing for customs exemptions for equipment and raw materials necessary for industry restructuring and not manufactured in Poland.

Responsible person: Minister of International Economic Co-operation.

Due date: annually.

6. Performing the study on the needs and possibilities of application:

-protectional clauses, in compliance with regulation of the European Treaty and GATT/WTO, admitting protection of the domestic manufacturers and exporters interests,

-restructuring clause for protection of industries undergoing a restructuring process and domestic infant industries.

Responsible persons: Minister of Industry and Trade, Minister of International Economic Co-operation.

Due date: 1995.

7. Application of the protectional clauses, according to the regulations of the European Treaty and agreements concluded with EFTA, CEFTA and GATT/WTO, admitting protection of the domestic manufacturers interests in compliance with the obligatory procedures.

Responsible person: Minister of International Economic Co-operation.

Due date: according to the presented applications/conclusions and relevant procedures.

Reasoning

Regulations under the international treaties will be essential for the purpose of export of Polish industrial products development, as they give access to new markets. These markets have been specified in the agreements signed by our country with the EC, CEFTA and GATT/WTO treaty. The aforementioned

agreements presume that the protective custom tariffs for the domestic market and national producers shall be lowered each year, on the other hand allowing for the interim period to apply instruments supporting adaptation of the industry to the circumstances of quality and price competitiveness. This may be achieved by applying protectional clauses and by application, in compliance with the EC regulations, of the market protection methods not related to custom duties and tariffs, which have not been used in Poland yet.

Protective measures within the period of transformation and restructuring of the national industry should be accompanied by the customs and tariffs policy stimulating the domestic production, equalizing chances of the Polish manufacturer and shaping the system of effective market protection against unfair foreign competition, in compliance with the methods settled by GATT.

In order to stimulate export-orientation of Polish producers and exporters it is necessary to maintain active exchange rate policy on the floating basis and to keep up pace of its adjustments with the inflation rate.

In view of currency policy the key factor shall be achievement of full external convertibility of Polish zloty.

SECTION II TECHNOLOGY POLICY MEASURES AIMED AT IMPROVEMENT OF INTERNATIONAL COMPETITIVENESS OF THE INDUSTRY

Introduction

One of the driving forces behind economic growth is active technology policy, shaping the interconnections between the areas of education, science and economy. The technology policy is related to innovation-oriented state policy, technical science policy, strategical governmental programs /SGP/ and educational policy, hence part of the proposed measures results from implementation of the aforementioned policies and programs. Its main objective - increase of innovation and improvement of competitiveness in the industry - will be achieved owing to assistance in development of technical science and research of new solutions, their promotion and implementation in the industry.

The Council of Ministers, on May 20, 1994, issued a decree amending the decree regarding deductions of investment expenditures from income and reductions of the income tax, which laid down a rule that those taxpayers who had borne investment expenses for purchase and installation of machinery and equipment associated with implementation of the licenses, patents and results of domestic scientific research & development works, may deduct from their income before tax the above listed expenses, up to 50% of this income.

The current system of stimulating technical progress is focused on support for the research area. Basic measures aimed at intensification of the technological modernization of the industry have been formulated in the schedule for implementation of the innovation-oriented state policy (adopted by the Council of Ministers on November 22, 1994). The tasks presumed for realization under the herein Program specify the scope of these activities and bring to attention the issues related to supporting of implementation activities.

The aforementioned measures shall be undertaken by the Government in the four basic areas:

- I. Research & development area
- II. Implementations infrastructure area
- III. Quality and modernity area
- IV. Information and training area.

I. Research & development area

Objective - guiding the industrial research & development facilities to focus on improving product competitiveness and expanding economic applications of the research works held.

Realization procedure:

1. Preparing and establishing for the enterprises the system of information on achievements and capabilities of the research & development units. Preparation of guidebooks referring to the offered services and solutions.

Responsible persons: Minister of Industry and Trade, Chairman of the Scientific Research Committee, research & development units.

Due date: consequently throughout 1995-1997.

2. Determination and publication of the priority directions of research & development works, with a particular regard to high-tech, ecology-oriented and material saving technologies (such as biotechnology, materials engineering, specialist electronics and chemical products, optoelectronics, production processes automation).

Responsible persons: Minister of Industry and Trade, Chairman of the Scientific Research Committee, the National Chamber of Economy.

Due date: 1995.

3. Analyzing and estimating the technological gaps and niches, particularly with regard to the "high opportunity" and high-tech industries, and working out the conclusions in respect of these industries restructuring. Preparation of the motions on establishing the research projects ordered for the purpose of solving key problems of separate industries as well as their realization schedules.

Responsible persons: Minister of Industry and Trade, Chairman of the Scientific Research Committee.

Due date: consequently throughout in 1995-1997.

4. Focusing budgetary financial means allocated for the division of "Science" on the applied research projects.

Responsible persons: Chairman of the Scientific Research Committee, Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

5. Organization of actions promoting co-operation of domestic research & development facilities with the foreign investors, who take over the privatized enterprises or undertake new industrial projects in Poland.

Responsible persons: State Foreign Investment Agency, Technology Agency (after its founding), Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

6. Elaboration of the law on research & development activities and adapting the research & development facilities framework to the changing ownership structure and needs of the industry.

Responsible person: Chairman of the Scientific Research Committee, Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

7. Promotion of initiatives related to the participation of Polish research & development units in the international research projects.

Responsible persons: Chairman of the Scientific Research Committee, Minister of Industry and Trade, Technology Agency (after its founding).

Due date: consequently throughout 1995-1997.

Reasoning

Poor financial condition and decapitalization of fixed assets of the many enterprises restrain them from implementation of the research results. Information on the capabilities of Polish research facilities and understanding of the Polish economy needs in the research & development units are not satisfactory. In 1993, the Ministry of Industry and Trade prepared a guidebook on the research & development units, in 1994 - a guidebook on the sector's products, services, technologies and laboratories of the research & development units. It is necessary to continue the actions aimed at establishing a network of information feedback between the economy and the research & development area.

The progress of research works and their industrial applications shall be determined by financial standing of the enterprises and the possibilities of their participation in financing of the research projects, exchange of information between science and industry and funds available from the state budget for financing of these area. With low level of spending for science purposes it is necessary to use it rationally, for supporting these projects, which facilitate an increase in production of export goods and high-tech products, primarily in the sectors of higher development opportunities in view of market prospects and achieved level of rentability. Within the adjusting period the funds for research works should be allocated first of all to the applied research projects, having a practical economic use.

32 motions have been prepared for 1995, regarding applications for establishing ordered research projects, including: reduction of production costs in the coal mining, optimization of the iron and steel industry restructuring process, restructuring of the foundry engineering, shipbuilding industry, wood industry, ecology-oriented and economizing technologies in the cement and lime industry, modern technologies in the specialized electronics, optoelectronics, power engineering, works in the fields of materials engineering, wasteless technologies, waste utilization and chemical protection technologies, defense and safety of the country, health protection.

Advancing privatization of the industry requires possibilities for ownership transfers in the research & development area as well - currently all issues related to the research & development activity are covered by the law, which in principle refers to the state owned facilities.

It is also necessary to apply on a larger scale the possibilities created by additional protocol signed on December 23, 1994 between Poland and the European Union, regarding access to the EC programs.

II. Implementations infrastructure area

Objective - intensification of implementations of modern technologies and production methods in the industry.

Realization procedure:

1. Founding of the Technology Agency, in order to perform the following tasks:
 - commercialization of the applied research area, especially in the field of modern technologies (including the ecology-oriented ones),
 - supporting the implementation processes,
 - control and supervision over realization of the strategical governmental programs in the industry.

Responsible person: Minister of Industry and Trade.

Due date: 1995.

2. Supporting development of the regional institutions, which set their goals on transferring new technologies (scientific and production consortiums, technology parks, innovation centers and so on).

Responsible person: Minister of Industry and Trade, Technology Agency (after its founding), Industrial Development Agency, Polish Foundation for Promotion and Development of Small and Medium Business (after its founding), National Chamber of Economy, universities, regional development agencies.

Due date: consequently throughout 1995-1997.

3. Preparation and implementation of the program of assisting small and medium enterprises in getting access to technologies (initiating organization of new capital institutions, program of getting access to the scientific research results through participation in their financing from the aid funds, development of the information system).

Responsible person: Minister of Industry and Trade, Chairman of the Scientific Research Committee, Minister of Finance, Polish Foundation for Promotion and Development of Small and Medium Business (after its founding).

Due date: 1995.

4. Working out and implementing the licensing policy.

Responsible person: Minister of Industry and Trade. It is necessary to appoint the inter-sectoral committee by the Prime Minister.

Due date: 1996.

5. Modification of the technology policy instruments applied in the industry after having analyzed their effectiveness.

Responsible person: Minister of Industry and Trade, Minister of Finance, Chairman of the Scientific Research Committee.

Due date: annually.

6. Study on the resources and effectiveness of the technical development in the industry, efficiency of the research & development facilities and their activity.

Responsible person: Minister of Industry and Trade, Chairman of the Scientific Research Committee.

Due date: periodically.

Reasoning

It is essential to reinforce processes of transferring the results of research works and their better adjustment to market strategy adopted by the industrial enterprises. With this aim in view the Technology Agency shall be established. It will serve the purposes of raising technical competitiveness of Polish industry, functioning as the national center of transferring new technologies directly to the enterprises. Additionally, the regional development agencies will be evolved, aiming at supporting implementations, promotion and commercialization of the research results, as well as transfer of new technologies to small and medium enterprises. The practice of highly developed countries justified this direction of adopted solutions.

Improvement of effectiveness of the financial and organizational instruments stimulating modernization processes is also indispensable. The domestic research & development capacities will not be able to make up the many years' detainment in technical progress all by themselves. The contribution of foreign technologies shall be necessary, e.g. by purchasing of licenses. It is related to the necessity of working up the licensing policy.

III. Quality and modernity area

Objective - to attain international quality standards and modernization of production.

Realization procedure:

1. Creation and implementation of the supporting schemes for modernization of the machinery and equipment stock and renewal of the production range, by means of organizational and system solutions provided for in the "Objectives of the Innovation-oriented State Policy".

Responsible person: Chairman of the Scientific Research Committee, Minister of Industry and Trade and other ministers of economic sectors, Minister of Finance.

Due date: 1995-1997.

2. Harmonization of the national technology standards, quality control system (attestation and certificates) and safety regulations with the European Union standards, including preparation and implementation of the quality control systems in the enterprises and research & development units, implementation of the quality control promotional program as well as publication of the good national patterns.

Responsible persons: Polish Standards Committee, Polish Center for Research and Attestation, Minister of Industry and Trade.

Due date: 1995-1997; continuation according to the adopted schedules.

3. Intensification of the eco-oriented measures through introduction of Clean Production rules into production and development programs of the enterprises,

working out model of measuring technologies in respect of the natural environment protection, promotion of recycling, eco-oriented and material saving technologies.
Responsible person: Minister of Industry and Trade, Minister of Environmental Protection, Natural Resources and Forestry.
Due date: consequently throughout 1995-1997.

4. Establishing the program of introduction automation systems into the industry within the framework of UNIDO regional (European) program.
Responsible persons: Minister of Industry and Trade, research & development units.
Due date: consequently throughout 1995-1997.

5. Preparation and implementation of a program for restoring importance and role of brand names and trade marks.
Responsible persons: Minister of Industry and Trade, National Chamber of Economy.
Due date: second half of 1995.

Reasoning

Improvement of innovative qualities of Polish industry is a precondition of improving its competitiveness. Innovative qualities mean industrial enterprises' capability and motivation to continuous search for results of the research & development works, new organizational concepts, improvement and development of existing production processes, modernization of the machinery and equipment and applying them in practice. The statistical data show that Polish enterprises are described by: lack of capabilities for financing progressive investment projects and research & development works from their own accumulated financial means, low ratio of machinery and equipment restitution (due to excessive depreciation periods), insubstantial use of computer technic in designing, management and manufacturing processes, low level of modernity and eco-orientation of applied technologies. The standard of products standardization, tests and attestation does not impose suitable level of production quality and modernity.

IV. Information and training area

Objective - improvement of the scientific, technical and marketing information system, raising staff qualifications.

Realization procedure:

1. Identification of the economic entities needs in respect of personnel training, postgraduate studies and other forms of supplementary education.
Responsible persons: Minister of Industry and Trade, Minister of National Education.
Due date: 1996.

2. Making a list of the systems serving scientific, technical, marketing and financial means availability information feedback, as well as its publication.

Responsible persons: Chairman of the Scientific Research Committee, Minister of Industry and Trade, National Chamber of Economy, Technology Agency (after its founding);

Due date: 1996.

3. Intensification of training and promotional actions in the aspects of productivity, with particular consideration for management systems and marketing strategies.

Responsible person: Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

4. Adapting directions of professional training and supplementary education as well as education programs to changing needs of the industry (particularly in the scope of modern methods of organization, management and marketing).

Responsible persons: Minister of National Education, Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

Reasoning

Transformation processes in the industry require recruitment into the research & development and designing units and enterprises management staff professionally educated in modern way, which means persons skilled to efficient and innovation-oriented performance of their duties. The present information and education systems are not adjusted to the projected structural and ownership changes in the industry and to the development of small and medium business sector. It is obedient to organize such system of supplementary education of personnel, which would be suitable for changing requirements of both the industry and the research & development area during the transformation period.

SECTION III STRUCTURAL CHANGES NECESSARY FOR IMPROVEMENT OF THE INDUSTRY COMPETITIVENESS

Introduction

Sustaining of the achieved growth along with further development of Polish industry depend on consistent realization of changes in the industry structure. It is related to necessity of deep modernization, enabling improvement of domestic products competitiveness, both in the domestic market and abroad. This in turn, requires quick progress in adapting the industry structure¹ to the needs of market-oriented economy, through creating suitable legal and organizational solutions (including elaboration of the industrial law), as well as economic and program conclusions for changing its ownership, financial and technical structure.

The basic spheres of actions include:

- I. Transfer of ownership
- II. Changes in the industrial structure
- III. Guiding development in regions of high industrial concentration
- IV. Internal restructuring of enterprises.

I. Transfer of ownership

Introduction

Privatization process of the state owned enterprises is aimed at increasing economic efficiency and ensuring advancement of entrepreneurship and innovations. In result of this process extended contribution of financial means for investment and development purposes should be attained.

The ownership transfers process is currently carried on under procedures referred in the law on privatization of state owned enterprises and the law on state-owned enterprise. In 1994, proceedings based upon the law on National Investment Funds and their privatization were commenced. There were launched procedures of debt conversion into shares, on the basis of proceedings regulated by the law on financial restructuring of enterprises and banks.

The tasks provided in the herein "Program..." lead to equalization of legal terms of operation for all economic entities, basing upon the Commercial Code.

¹Structure, interpreted in aspects of both ownership form and size of enterprises (small, medium and large ones), as well as of products processing stage (extractive and manufacturing industries).

Objectives - unification of terms of operation for all economic entities, regardless of their form of ownership,
- increasing management efficiency.

Realization procedure:

1. Establishment of the State Treasury and elaboration of a relevant law.
Responsible person: Bureau of the Cabinet.
Due date: 1995.
2. Implementation of the program of general transformation of state owned enterprises into one-holder companies of the State Treasury.
Responsible persons: Minister of the Ownership Transfers, Minister of Industry and Trade.
Due date: 1995.
3. Expanding of application possibilities for capital market instruments in the privatization process.
Responsible person: Minister of the Ownership Transfers, Minister of Finance.
Due date: 1995.
4. Implementation of specialist restructuring programs (e.g. the Stabilization - Restructuring - Privatization program and the law on ownership transfers of certain enterprises of particular importance for the national economy).
Responsible persons: Minister of the Ownership Transfers, Minister of Finance, Minister of Industry and Trade.
Due date: 1995.
5. Amendments in the bankruptcy law aimed at advancement of the bankruptcy proceedings.
Responsible person: Minister of Justice.
Due date: 1995.
6. Preparation of the draft of Industrial Law (see also section II.1.1. p. 2). It is necessary to appoint the inter-sectoral committee.
Responsible person: Minister of Industry and Trade.
Due date: first half of 1996.
7. Specification of these economic sectors and types of enterprises, which shall be subject to special control of relevant state authorities during the process of privatization.
Responsible persons: Minister of the Ownership Transfers, Minister - Director of the Central Planning Office, Minister of Industry and Trade.
Due date: 1995-1997.

Reasoning

It is obedient to significantly improve management of the state owned enterprises through efficient management structures, guided by the market rules. The above set objective shall be achieved by means of transformation of state owned enterprises into commercial companies (incorporation process). It assumes prompt switch from hardly efficient, in most cases, organizational and legal framework of state owned enterprises to a legal form implemented by market-oriented economy, namely a corporation. The incorporation process should be completed as soon as possible and encompass all enterprises, with only except for those listed in particular laws. The previous experience indicates a necessity of quickening pace of economic reforms, including privatization. The share of state owned sector in GNP, production and employment is still high, however it shows a clear decline. The privatization process shall be intensified through applying its various forms. Additionally, there is an urgent need of regulating the ownership relations with respect to state owned property remaining at the disposal of state owned economic entities, hence there are proposals of new regulations regarding principles of founding, operation, sanation and liquidation of the state owned enterprises.

II. Changes in the industrial structure

II.1. Policy measures addressed to small and medium business (SME)²

Introduction

Development of small and medium business sector will allow for:

- reduction of unemployment caused by restructuring or liquidation of state owned enterprises,
- expansion of private sector's share in the economy structure,
- creation of modern co-operation and services environment.

In order to perform the above set tasks, it is required to repeal the existing legal, tax and financial barriers, as well as to expand institutional assistance in organizational, information, training and technology areas.

The system supporting SME development is referred to in the draft of "Policy addressed to small and medium business".

Supportive measures for the SME sector shall be carried on in four basic areas:

1. Developing conditions in order to facilitate advancement of the SME sector
2. Reduction of the operational risk of SME
3. Modeling conditions suitable for improving competitiveness of the SME sector
4. Development of the financial services market.

Objective - development of small and medium businesses.

² According to the EC standards the category of SME means companies that employ up to 250 people, and their turnover does not exceed ECU 20 million or balance sum does not exceed ECU 10 million. Some countries, however, accept employment limit up to 500 people.

II.1.1. Developing conditions in order to facilitate advancement of the SME sector

Realization procedure:

1. Amending of the legal system after its review, in the first place of civil and commercial law, in view of their impact on founding and operation of small and medium businesses and their compliance with the EC regulations.

Responsible person: Minister of Industry and Trade.

Due date: review of the law - first half of 1995, amendments - 1995-1997.

2. Preparation of the draft of Industrial Law which, in its part concerning small and medium business, will include the issues of definition of small and medium enterprise, legal forms and rules of conducting business activity in the fields of industry, trade, services and handicraft as well as regulations regarding economic self-government and businessmen organizations.

Responsible person: Minister of Industry and Trade.

Due date: first half of 1995.

3. Supporting development of regional and local organizations aimed at promotion and aid for the SME sector, particularly in the regions of potential structural unemployment.

Responsible persons: Minister of Industry and Trade, Polish Foundation for Promotion and Development of Small and Medium Business (after its founding).

Due date: consequently throughout 1995-1997.

Reasoning

In the past few years regulations controlling conducting of business activity were amended for many times. In order to ensure their integrity and compliance with the EC regulations, they should be thoroughly analyzed and reviewed, amended and codified as a consolidated document.

The issues of economic self-government need systematization and introduction of the rule of common access of economic entities into the self-government institutions. Equally important as legal issues, is a problem of suitable social climate around entrepreneurship at the moment of founding and organizing small and medium companies, which is accommodated by network of organizations supporting establishment of new businesses. They include among others regional development agencies and incubators of entrepreneurship.

II.1.2. Reduction of the operational risk of SME

Realization procedure:

1. Completion of preparations over the draft of law on Tax Regulation.

Responsible person: Minister of Finance.

Due date: 1995.

2. Establishment, basing upon the aid funds, of local credit guarantees fund for small and medium enterprises in one of the regions intimidated with structural unemployment.

Responsible persons: Minister of Industry and Trade, Minister of Finance.

Due date: second half of 1995.

3. Assisting and participating in establishment of the system of regional mutual assurance societies.

Responsible person: Minister of Industry and Trade and regional development agencies.

Due date: consequently throughout 1995-1997.

Reasoning

Businessmen organizations report objections as to taxation forms applied to small companies, rules of keeping the financial evidence and difficult access to the bank loans.

Reduction of the operational risk of SME requires then:

- stable and reasonably simple taxation system,*
- availability of bank loans,*
- creating possibilities of providing credit guarantees.*

In 1994, the Fund of Credit Guarantees for Small and Medium Business was established in the Bank Gospodarstwa Krajowego (BGK) /Bank of National Economy/. It is aimed at facilitating small and medium companies access to bank loans.

The relevant measures were undertaken, aimed at preparation of the project of local credit guarantees fund established with participation of the aid funds and its implementation as a trial (pilotage) project. According to the presumptions, the fund will be available first of all for the companies creating new jobs in the regions of high unemployment risk, undertaking investment projects in order to launch production basing upon new, fuel and energy saving and environmental friendly methods and technologies. The alternative is establishing funds allowing for mutual guaranteeing repayment of the received loans by the companies themselves. There is a big chance of solving this problem through setting the network of regional mutual assurance societies.

II.1.3. Modeling conditions suitable for improving competitiveness of the SME sector

Realization procedure:

1. Support and promotion of institutional assistance in organizational aspects and in respect of facilitating access to information in the fields of management, finance, marketing, quality control, professional training and alike.

Responsible person: Minister of Industry and Trade.

Due date: consequently throughout 1995–1997.

2. Implementation of the system enabling involvement of the SME sector in the industrial co-operation.

Responsible person: Minister of Industry and Trade, Polish Foundation for Promotion and Development of Small and Medium Business (after its founding).

Due date: consequently throughout 1995–1997.

3. Creation of special system of organization and procedures for supporting the SME sector's access to technologies.

Responsible person: Minister of Industry and Trade, Technology Agency (after its founding).

Due date: 1996.

4. Completion of works over the draft of the law regulating the operation of commodity stock exchanges.

Responsible person: Minister of Industry and Trade.

Due date: 1995.

Reasoning

Majority of newly established Polish small and medium businesses are trading and services companies. The industrial enterprises make only 19% of them, and the share of high-tech industries is insignificant. The main reasons of such situation are, on one hand – high capital consumption of production, and on the other hand – lack of knowledge and skills of the people, who start business operation. Quality and price of the products are the most important factors of their competitiveness, both in the domestic and foreign markets. Both factors are influenced by the applied technology, quality control and management. Modeling of favourable conditions for organizing institutions which accommodate the potential businessmen's access to modern technologies, supplementary professional education as well as contemporary management methods through quality control systems are indispensable as measures aimed at improving competitiveness. It is much easier for small and medium enterprises to co-operate with large producer than to manufacture final goods all for themselves. Hence, it is important to create a system of searching for potential partners for co-operation, both domestic and

foreign. The Network of Co-operation Contracts Agencies, established owing to the aid funds; is an example of such system.

The commodity stock exchanges could also facilitate operation of the SME sector, which requires appropriate legal regulations.

II.1.4. Development of the financial services market

Realization procedure:

1. Creating legal framework specifying rules for establishment and operation of non-banking financial institutions, in order to support local credit guarantees funds for small and medium business.

Responsible person: Minister of Industry and Trade, Minister of Finance.

Due date: first half of 1996.

2. Acquiring financial means from international aid funds allocated for supporting development of the SME sector and supervision over their rational use.

Responsible person: Minister of Industry and Trade.

Due date: according to the procedures of using the aid funds.

Reasoning

Limited availability of bank loans for small and medium business is involved with these sector's inability to present appropriate pledge of the granted loans and it is a result of the bank's unwillingness to bear extended risk. Therefore, it is essential to create suitable circumstances for establishment of financial institutions supporting local credit guarantees funds for small and medium business. Availability of a series of international aid funds for financing development of the SME sector and their inefficient allocation entails a necessity of institutional support of measures aimed at intensified allocation of these financial means.

II.2. Restructuring of the industrial sectors³

Introduction

One of the methods of improving competitiveness of industrial enterprises is their ownership, organizational, financial and technological restructuring, based upon the results of sectoral studies. In restructuring processes, the forms of acceptable state assistance are applied.

Detailed information on sectoral programs are presented in the enclosure to the program. There have been described both actions aimed at restructuring of the industrial infrastructure, i.e. coal mining, electrical power engineering, oil sector, defense sector, iron and steel industry and "heavy chemistry", as well as the "high opportunity" sectors. Hence, international competitiveness of the industry is

³The sector means here a group of enterprises selected upon a certain criterium (see Objectives of Industrial Policy adopted by the Government in 1993).

a combination of progress in implementation of all programs and direct involvement of individual enterprises in their realization.

In the herein "Program ..." special significance has been assigned to the development of "high opportunity" sectors. This category represents those industrial sectors, which, owing to favourable market prospects and views of efficiency, should gradually engage surplus labour resources. Thus, this will entail transformation of the industry sectoral structure in the direction of increased share of modern, efficient and sellable production (in long-term). The program presumes introduction of a system of estimating industrial sectors in view of their development capabilities, and then, implementation of the multi-directional actions stimulating and promoting progressive initiatives.

Objective - to adapt industry structure to the needs of open economy and improvement of Polish industrial offer competitiveness, particularly in the sectors:

- determining the power supply and defense security of the country,
- of "high-opportunity".

II.2.1. Restructuring of sectors determining the security of power supplies of the country results from the "Proposals regarding restructuring programs for coal and lignite mining, gas and electric power engineering, heat engineering and liquid fuels industry" adopted by the Council of Ministers on May 19, 1992 and the program, adopted successively by the Government on March 29, 1994, of "Restructuring of coal mining. Program for realization of stage II during the period of 1994 - 1995".

Realization procedure:

1. Preparation and implementation of the "Objectives of the Power Supply Policy in Poland till 2000".

Responsible person: Minister of Industry and Trade.

Due date: first half of 1995 - presenting the document for KERM's review.

2. Completion of works over the Power Engineering Law.

Responsible person: Minister of Industry and Trade.

Due date: first half of 1995 (adopting by the Council of Ministers the document accepted by KERM on November 10, 1994).

3. Undertaking of restructuring actions, accordingly to the programs mentioned in the enclosure "Information on sectoral studies and programs supervised and controlled by the Ministry of Industry and Trade":

- restructuring of the electric power sector (item 4)
- restructuring of the coal mining (item 2),
- restructuring and privatization of the oil sector (item 6),
- organizational restructuring of the Polish Oil and Gas state-owned enterprise (item 5),

- development of gas engineering, accordingly to the "Report on Natural Gas Supplies till 2000" adopted by KERM on December, 23, 1992.

II.2.2. Restructuring of the defense sector will be realized basing upon the program presented for approval to KSORM (item 7 of the enclosure "Information ...").

II.2.3. Restructuring of the energy- and capital-consuming sectors is regarding continuation of the program adopted in December 1992 for the iron and steel industry (item 1 of the enclosure "Information ...") as well as a program elaborated for the "heavy chemistry" sector (item 10 of the enclosure "Information ...").

II.2.4. Monitoring of the sectoral programs realization adopted by the Council of Ministers. Presentation of the annual reports to the Council of Ministers.

Responsible person:

Minister of Industry and Trade, Minister of the Ownership Transfers.

Due date:

annually.

Reasoning

Industrial policy specifies sectors, which require special involvement of the state in their restructuring processes. The above concerns the sectors essential for power supplies and defense security of the country, namely the fuel and power engineering and defense industry. Within the fuel and power supply sector, restructuring is aimed at applying new energy-saving technologies, solving the problems related to ecology, steering towards improvement of economic and technical efficiency and self-financing of these sectors. Within the defense sector, restructuring process leads to providing production capacity at a level assumed by the defense doctrine and conversion of part of production capacities for the civilian production purposes. Restructuring of the energy- and capital-consuming sectors must be continued, since inefficient operation within these sectors affect the whole economy. It is impossible to restructure other sectors without restructuring of the energy- and capital-consuming sectors, as they belong to industrial infrastructure. In the years 1995-1997 the restructuring processes will include first of all: iron and steel industry and "heavy chemistry" sector, which need technological modernization, implementation of new production methods lessening their adverse impact on natural environment, as well as adjusting production range and scale and products quality to the co-operation needs of other sectors and the market.

II.2.5. Development of "high opportunity sectors"

Introduction

This area includes the industries, which:

- are generating modernity and technological modernization,
 - have possibilities of developing profitable export activity,
 - are essential for modernization of the industry and improvement of its structure.
- This concerns especially those cases, when individual market success brings positive external results to the whole industry.

Highly efficient projects in this area shall be supported by various forms of state policy. Favourable circumstances for development of these industries shall be created, by means, for example, of giving priority in recommending them to the domestic and foreign investors, making available international aid funds at the Government's disposal, increasing expenditures on research & development, assistance in modernization of existing economic entities and in establishing new ones (from designing stage to full maturity of the project).

Realization procedure:

1. Drawing out annual ranking lists, estimating development chances of industrial sectors in view of market dynamics, achieved efficiency and proved operational skills (see enclosure to section III).

Definition of the high opportunities area (reviewed each year).

Responsible person: Minister of Industry and Trade, Central Office of Statistics.

Due date: third quarter of each year.

2. Preparation and implementation of the monitoring system of situation and terms of operation for the enterprises classified as "high opportunity" sectors.

Responsible persons: Minister of Industry and Trade, Central Office of Statistics.

Due date: 1995.

3. Undertaking research aimed at identification of market niches and conditions of promotion (both within the country and abroad), giving chances of increasing sales of Polish products within the high opportunity area.

Responsible persons: Minister of International Economic Co-operation, Minister of Industry and Trade.

Due date: through the second quarter of 1995.

4. Undertaking research aimed at identification of technological gaps and niches, as well as scope of research & development works and new technical solutions (products, technologies) preferred in respect of restructuring and commercial expansion within the "high opportunity" sectors area.

Responsible persons: Minister of Industry and Trade, Chairman of the Scientific Research Committee.

Due date: commencing from the second quarter of 1995.

5. Inspiring and promotion of industrial enterprises and research & development units initiative within the "high opportunity" sectors area, in the scope of:

- present commercial offer,
- development projects,
- offers of co-operation (trade, marketing, industrial co-operation in technical and capital aspects).

Responsible persons: Minister of Industry and Trade, Minister of International Economic Co-operation, State Foreign Investment Agency.

Due date: commencing from the second quarter of 1995.

6. Working out the program of converting foreign debts into shares in capital of the selected enterprises of "high opportunity" sectors.

Responsible persons: Minister of Finance in co-operation with Minister of Industry and Trade.

Due date: 1995.

7. Preparing sectoral studies and programs for these "high opportunity" industries which require restructuring. Continuation of the already started studies (item 16 of the enclosure "Information ...").

Responsible person: Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

8. Supervision and control over sectoral programs prepared for the "high opportunity" sectors, including:

- "Program of Measures Aimed at Restructuring of Polish Pharmaceutical Industry" adopted by the Council of Ministers on November 2, 1995 (item 3 of the enclosure "Information ...").

- "Mechanisms of the State Policy Addressed to Shipbuilding Industry Aimed at Improvement of its Competitiveness" - after having acquired Government's approval (item 8 of the enclosure "Information ...").

- "Restructuring Program for the Non-Ferrous Metals Industry" - after having acquired Government's approval (item 9 of the enclosure "Information ...").

Responsible persons: the ministers and organizations indicated in the aforementioned programs, managers of the enterprises.

Due date: according to the programs.

9. Organization of training and supportive measures (in the field of organization, management and marketing, international quality control systems, etc.) for the enterprises undertaking implementation of the sectoral programs within the "high opportunity" area.

Responsible persons: Minister of Industry and Trade, Industrial Development Agency.

Due date: consequently throughout 1995-1997.

Reasoning

In view of further industrial development, it is obedient to find out sectors, products or enterprises called "stars" in marketing, which have a chance of reaching competitiveness in the nearest future and becoming one of the driving forces of the economy. The state assistance shall be addressed to these sectors and products – not only in its financial scope (training, information, active promotion), supported by the aid funds. The ranking lists shall be drawn out basing upon certain criteria, the monitoring system shall be introduced and the sectoral studies will be continued. Some sectors have been already examined (e.g. pharmaceutical, shipbuilding and non-ferrous metals industries) or are currently subject to inspection. In results of the performed studies, there are technological gaps and niches revealed, the scope of required restructuring processes is defined, and the directions of preferred research and implementations as well as promotional needs are identified. The influence of legal and macro-economic terms of operation on the enterprises under examination is determined, thus the conclusions for economic policy may be formulated.

Working out and introducing in practice the rules of conversion the foreign debt into share in capital will become one of the forms of solving problems of Polish foreign indebtedness and foreign investments promotion. The conversion program will concern particularly the sectors and areas of great importance for the industry modernization and export opportunities.

II.3. Industrial share in development of the technical infrastructure of the country

Introduction

Structural advancement and modernization is one of fundamental elements of the economic growth strategy. Under the circumstances of extensive industry restructuring process, often involving considerable employment reductions, the measures aimed at development of the national infrastructure are making opportunities for creating new jobs and industry development. This will create as well opportunities for small and medium business, which would undertake risk of presenting relevant offers.

The undertaken actions will focus on the following programs of building:

- highways,
- national gas supplying network and transit gas-pipes
- telecommunication system
- railway system
- water-ways.

Objective – participation of domestic industry in the national infrastructure development programs, allowing for:

- production growth and improvement of the technological advancement of products,
- creating new jobs.

Realization procedure:

1. Promotion of the highways construction program and supporting the initiative of industrial enterprises (presentation of requirements and terms of deliveries, catalogues of offers, proving conditions of attestation).

Responsible person: Minister of Industry and Trade, Minister of Transport and Sea-Shipping.

Due date: consequently throughout 1995-1997.

2. Promotion of the national gas supplying network and transit gas-pipes construction program and supporting the initiative of industrial enterprises (presentation of offers, co-operation, conditions of attestation).

Responsible person: Minister of Industry and Trade.

Due date: consequently throughout 1995-1997.

3. Supporting the initiative of industrial enterprises, taking interest in participation in the telecommunications development program.

Responsible persons: Minister of Industry and Trade, Minister of Telecommunication.

Due date: consequently throughout 1995-1997.

4. Preparation of the restructuring program for the rolling stock sector, consolidated with the transport policy, within framework of supporting the initiative of industrial enterprises taking interest in participation in the railway system development program.

Responsible person: Minister of Industry and Trade.

Due date: 1996.

III. Guiding development in regions of high industrial concentration

Introduction

During the period of 1995-1997 supportive measures will involve regions of high industrial concentration, such as Walbrzych, Lodz, and Katowice provinces and cities dominated economically by one big industrial plant - for example Mielec.

Objectives - releasing local initiative for establishing new types of business activity,

- improvement of natural environment condition in the region, owing to modernization and closing down the particularly noxious plants,
- creating new jobs.

According to the State Regional Policy Objectives, adopted by the Council of Ministers on July 12, 1994, the main courses of actions focus on:

- increasing effectiveness of organizations participating in realization of industrial policy at the local and regional levels,

- supporting development of small and medium business,
- correlating governmental sectoral restructuring programs with the regional economic programs,
- establishing special economic zones.

Realization procedure:

1. Preparation and implementation of efficient system of regional development agencies financial aiding in their actions aimed at introduction of modern technology, especially in small and medium enterprises.

Responsible persons: Minister of Industry and Trade, Industrial Development Agency, Polish Regional Development Agency, Technology Agency (after its founding), Minister of Finance.

Due date: 1995.

2. Performing a study on effective allocation of financial means from the Struder international aid fund and undertaking relevant measures.

Responsible persons: the Minister - Director of Central Planning Office, Government Representative for European Integration and International Aid, Polish Regional Development Agency in agreement with regional development agencies.

Due date: first half of 1995.

3. Drawing out and concluding regional contract in the Katowice province and implementation of mechanisms involved by correlation of sectoral restructuring programs with the Upper Silesian economic policy.

Responsible person: Voivode of Katowice in co-operation with regional self-government organizations and the Minister of Industry and Trade.

Due date: 1995.

4. Preparation and implementation of operational programs for the Walbrzych province accordingly to the "Walbrzych Province Development Strategy".

Responsible person: Voivode of Walbrzych, economic self-government organizations, Regional Development Agency, Foundation of the Walbrzych Region.

Due date: consequently throughout 1995-1997.

5. Elaboration of specific solutions and realization of objectives set in Lodz Region Restructuring Program, including realization of the "Lodz Cotton" and "Lodz Wool" programs.

Responsible person: Voivode of Lodz.

Due date: according to the aforementioned programs.

6. Establishment of the trial special economic zone on the grounds of the law dated October 20, 1994 (Gov. Laws & Regulations Gazette No. 123, item 600) and elaboration of the draft of Council of Ministers decree instituting this zone.

Responsible person: Minister of Industry and Trade.

Due date: first quarter of 1995-draft of the decree, establishment of the zone - 1995.

7. Establishment of the subsequent special economic zones.

Responsible person: Minister of Industry and Trade.

Due date 1996-1997.

8. Supporting measures aimed at establishing mutual assurance societies (section II.1.2. p. 3).

Responsible persons: Minister of Industry and Trade, regional development agencies.

Due date: 1995-1997.

Reasoning

Regional development agencies should consolidate interests of local authorities, banks and central government in entrepreneurship promotion, organization of economic projects financing, participating in preparation and implementation of restructuring programs in the region and their correlation with economic policy of the province. Currently, regional development agencies are subject to taxation same as common economic entities and they have small capitals at their disposal - insufficient for effective operation. Parallel, practices of various countries proved high efficiency of this type of organizations, particularly in the scope of implementing new technologies and supporting development of small and medium business, however on the condition of providing them with sufficient financial means (from the state budget and aid funds).

The law on establishing special economic zones reveals new opportunities of realization of regional policies, particularly in the cities dominated economically by one big plant, having at its disposal technical infrastructure, qualified staff and unappropriated assets. Such enterprise - provided that an attractive offer for potential investors was presented, which usually is accompanied by development of small business - may become source of economic development and create new jobs. In 1995, the Minister of Industry and Trade is going to establish first pilotage zone, and in 1996-1997 - several next zones. While deciding on the special zones location, mainly economic criteria shall be considered and in case of equally attractive motions - additional elements arising from legal objectives of special economic zones establishment shall be reviewed.

IV. Internal restructuring of enterprises

Introduction

Market-oriented economic environment forces the enterprises to change their strategies. Internal restructuring of enterprises is regarding both technological and assortment transformations, as well as organizational and legal changes. Many of the instruments stimulating enterprises restructuring have been implemented already. The herein "Program ..." specifies measures aimed at their extended practical application. It also assumes systematization and stabilization of legal terms of conducting business activity, for example by elaboration of the Industrial Law.

Objective – modification of the internal structure of enterprises with purpose of their market and marketing stimulation, improvement of economic indexes, technological aspects and management system.

Realization procedure:

1. Creation of systematized legal conditions, e.g. by elaboration of the Industrial Law (section III, chapter II.1.1. p. 2).

Responsible person: Minister of Industry and Trade.

Due date: first half of 1996.

2. Organizational and financial assistance rendered to enterprises through intermediary of extra-government institutions.

Responsible persons: Industrial Development Agency, State Foreign Investment Agency, regional development agencies.

Due date: consequently throughout 1995–1997.

3. Extending scope of application of management contracts, creation of the supporting system, including guarantees for managers.

Responsible persons: Minister of the Ownership Transfers, Minister of Industry and Trade, Minister of Finance, Industrial Development Agency and other extra-government institutions.

Due date: consequently throughout 1995–1997.

4. Working out new forms of financial restructuring.

Responsible person: Minister of Finance.

Due date: through the end of 1995.

5. Improvement of the system of allocating budgetary financial means for the purposes of supporting restructuring processes (in 1995 the EFSAL one is functioning) in cases, when it is impossible to acquire funds from other sources.

Responsible persons: Minister of Finance, Minister of Industry and Trade (in the respect of giving opinion on enterprises initiatives).

Due date: 1995.

6. Giving access to budgetary subsidies allocated for restructuring of enterprises liabilities towards ZUS /Social Security Office/ in 1995.

Responsible person: Minister of Finance, Minister of Industry and Trade (in respect of determining the principles of granting subsidies), Minister of Labour and Social Welfare Policy, Industrial Development Agency.

Due date: 1995.

7. Creating legal grounds for consolidation of economic entities' actions aimed at realization of research & development projects, investment projects, monitoring, etc.

Responsible person: initiative of the Minister of Industry and Trade.

Due date: 1995.

Reasoning

Efficiency of measures undertaken in order to improve industry competitiveness, and particularly to raise export volume, depends on individual enterprises actions. Their active attitude and abilities of shaping market strategy and improving their financial standing will determine their prospects of progress. Chances of success will be based upon systematization and stabilization of legal grounds for conducting business activity (Industrial Law), extending of management contracts practical application, as well as continuation and extension of debt reducing procedures, arising from the law on financial restructuring of enterprises and banks. Consolidation of enterprises actions, for example in the scope of R & D, will undoubtedly increase their effectiveness. The Minister of Industry and Trade may give initiative for such actions. Final decisions, however, are up to economical entities.

Enclosure to section III

PRELIMINARY IDENTIFICATION OF THE HIGH OPPORTUNITY SECTORS
BASING UPON DATA FOR 1993
AND THE RANKING LIST DRAWN OUT BY
THE POLISH ECONOMIC SOCIETY EXPERTS
A.KARPINSKI and S.PARADYSZ ("Research on situation and development
chances of separate industrial sectors", Warsaw, September 1994)
TO THE ORDER OF MINISTRY OF INDUSTRY AND TRADE

"High opportunity" sectors have been defined upon 18 economic indexes representing criteria of marketing and efficiency.

The following industries have been classified in this category:

- clothing,
- toy manufacturing,
- aircraft,
- automation,
- medical instruments and apparatus,
- measuring instruments and non-electronic apparatus,
- machine-tool,
- copper metallurgy,
- machine-building for consumer goods industry,
- china-ware and faience manufacturing,
- bearing manufacturing,
- machine-building for electric power engineering,
- other products of wood industry,
- optical,
- tool and instruments manufacturing,
- rubber,
- pharmaceutical,
- electronics, particularly in the scope of specialist electronic equipment and power engineering electronics,
- furniture manufacturing,
- building materials, with particular regard for the cement, limestone and insulating materials industries.

Works over "high opportunity" sectors definition shall be methodically continued on the basis of industry monitoring, so that the above list will be updated on annual basis.

SECTION IV FINANCING OF THE PROGRAM

Introduction

The International Competitiveness of the Polish Industry Program is a fundamental element of industrial policy planned for the years 1995-1997.

Realization procedures and projects provided in this program refer to the plans described in other programs, that either determine the industrial state policy or are means of their implementation. It concerns first of all issues of implementing export-oriented and pro-innovation policies and supporting of the "high opportunity" sectors. Improvement of enterprises efficiency is also an effect of realization of sectoral industrial infrastructure restructuring programs, and namely coal mining, electric power engineering, oil and defence sectors, iron and steel industry and "heavy chemistry".

Detailed information on sectoral programs is presented in the enclosure to the program.

In final result, international competitiveness of the Polish industry will be achieved as combined effect of progress in implementation of all aforementioned programs and direct involvement of individual enterprises, stimulated in this direction by market and competition requirements as well as macro-economic regulations.

Financing procedure

The program assumes use of funds at the enterprises disposal, national and foreign capitals in the forms of direct investment, loans and credits, as well as financial means from the state budget and international aid funds.

The total amount of financial means available for realization of the "Program ..." for each year, has been estimated on the basis of projected basic economic indexes referred to in the "Strategy for Poland", and then confronted with the World Bank estimation of economic growth rate in Poland for the next four years. The results from both simulations are similar and their break-up for particular sources of financing looks as follows.

1. Enterprises own means and direct investments of foreign capital available for realization of the "Program ..." are estimated below (enterprises own means in milliard zlotys on the basis of 1994 prices after denomination, foreign capital - in milliard zlotys at current prices):

Description	1994	1995	1996	1997
Enterprises own means	10,7	13,5	14,6	15,8
Foreign capital	4,0	4,6	5,2	5,7
Total	14,7	18,1	19,8	21,5

Expenditure of enterprises own means allocated for development in 1995 has been estimated on the basis of simulating calculation with the assumption of 21% increase of net profit in comparison to 1994 and allocation of 50% of this profit for development purposes. For the years 1996–1997 additional assumption has been made of annual 8% growth of enterprises own means spending for investment purposes.

The value of foreign capital direct investments in Poland in real prices will be similar to the 1994 level. As to the foreign capital inflow to Poland in the form of public means (including credits from international financial institutions) in the period 1994–1997, the World Bank estimation indicates the sum of USD 6.7 milliard and for loans from the commercial banks – the amount of USD 7.5 milliard.

2. Budgetary means (for 1995 evaluated according to the budget law and for the years 1996–1997 estimated upon the results of sectoral studies, analyses and development forecasts of these sectors, with account for limited availability of state funds) including:

2.1. Subsidies for:

- liquidation of structurally inefficient mines, including coal mines and the Bobrek Steel Works,
- sustaining production capacity of the defense sector within the framework of PMG,
- central investment projects,
- activities in the field of general technology and supportive measures for researches and projects to order (from means of the Scientific Research Committee),
- founding of the Technology Agency and supporting its activity in the scope of promotion and transfer of technologies,
- subsidies for regional organizations aimed at transferring new technologies (scientific and production consortium, technological parks, centers of entrepreneurship development, and so on),
- subsidies to the interest on bank loans for export contracts financing,
- subsidiary financing of the Credit Guarantees Funds (for small and medium business) in the BGK,

in the years:

- 1995 approximately 594 million zlotys
- 1996 approximately 555 million zlotys
- 1997 approximately 573 million zlotys.

Additionally, the budget law for 1995 mention subsidies for:

- supporting of the restructuring and liquidation of enterprises (EFSAL), in the sum of 563 million zlotys,
- restructuring of liabilities due to social insurance premiums, amounting to 800 million zlotys.

Both sums are allocated for the whole economy purposes. Also the industrial enterprises included in the International Competitiveness of the Polish Industry Program will be entitled to this source of financing.

2.2. Quota of export contract insurance (within limits of the amount set annually in the budget law in its part concerning industrial enterprises):

in the years:

- 1995 approximately 2,500 million zlotys
- 1996 approximately 2,800 million zlotys
- 1997 approximately 3,050 million zlotys

2.3. Guarantees of bank loans repayment from the state budget means (within limits of the amount set annually in the budget law in its part concerning industrial enterprises included in the sectoral restructuring programs):

in the years:

- 1995 approximately 2,000 million zlotys
- 1996 approximately 3,000 million zlotys
- 1997 approximately 3,500 million zlotys.

3. Aid funds consisting of donation granted to Poland from the PHARE program (on the basis of projected draft strategy PHARE'95 for the years 1995-1999 and previous tranches).

Total expenditure for realization of the program shall amount to:

- 1995 approximately ECU 9.4 million
- 1996 approximately ECU 45.3 million
- 1997 approximately ECU 56.5 million.

ANNEX 3

Environmental Protection Act