

No. 7

ウルグアイ東方共和国 林産工業開発基本計画

事前報告書

1999年1月

国際協力事業団
鉱工業開発調査部

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鉱調工

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ウルグアイ東方共和国林産工業開発基本計画事前調査
報告書目次

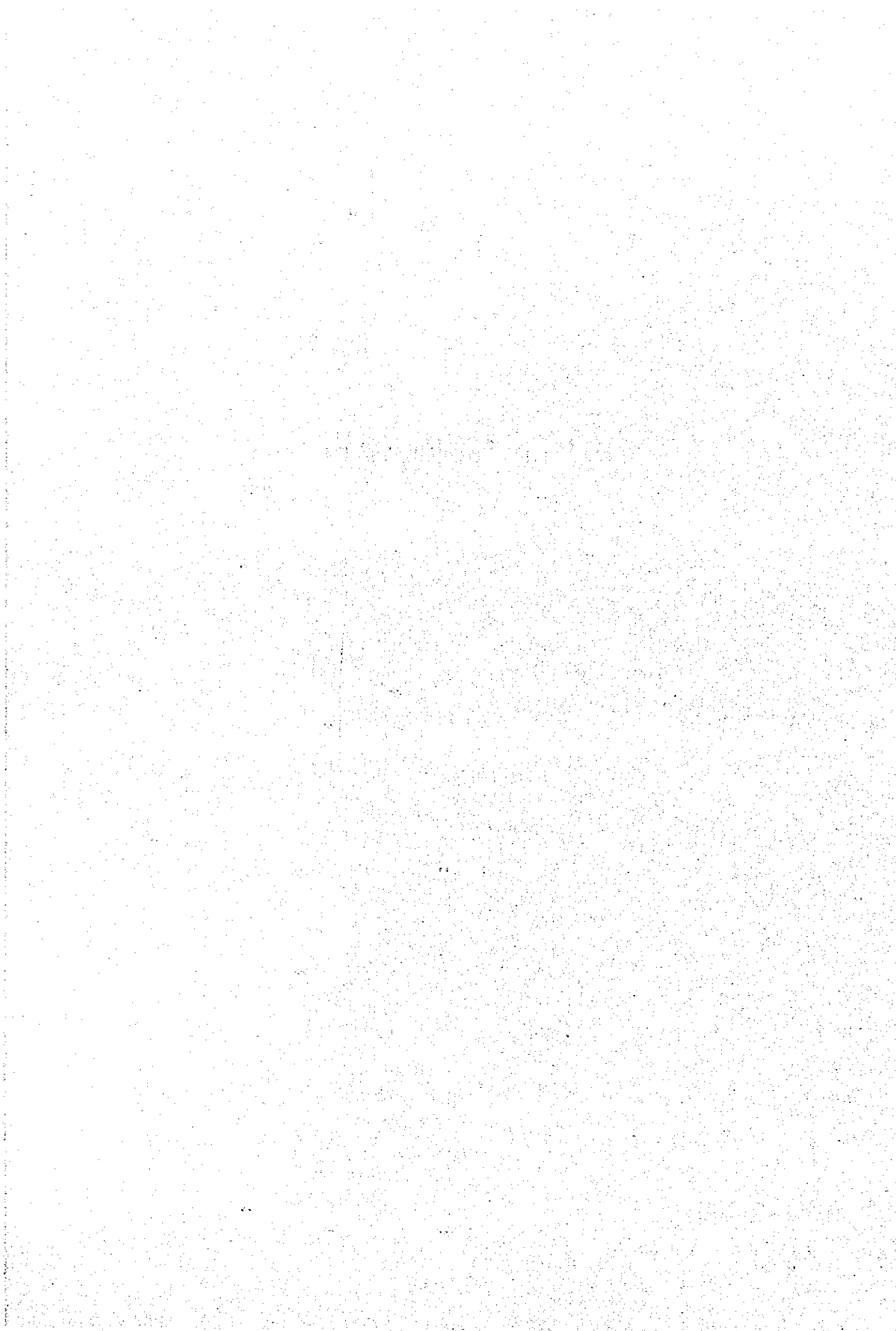
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第1部 調査報告



1. 調査の概要

1 調査団派遣の経緯

JICAは平成10年7月12日から7月31日までプロ形調査団を派遣し、要請の内容・背景、先方の実施体制について調査をするとともに、「ウ」国の林産工業振興の基礎となる開発調査の実施意義が十分に存在することを確認した。

以上の成果を踏まえ、本格調査実施細則の署名等を目的とした事前調査団が派遣されるに到った。

2 調査団派遣の目的

本事前調査は、プロ形調査の結果を受け、以下の2点について実施することを目的とした。

- (1) 本格調査実施細則(S/W)について「ウ」国側と協議を実施して合意形成を図り、合意されれば、その内容を元にS/Wを作成、署名する。
- (2) 本格調査の「ウ」国側実施体制について協議を行い、本格調査が効率的かつ効果的に実施されるよう、可能な限り機能的な実施体制の具体的な構築を図る

3 団員構成

- | | | |
|------------|------|-------------------------|
| (1) 団長・総括 | 加藤俊伸 | JICA鉱工業開発調査部工業開発調査課課長代理 |
| (2) 林産工業開発 | 石田滋雄 | JICA国際協力専門員 |
| (3) 技術協力行政 | 加藤陽子 | 通商産業省通商政策局技術協力課技術協力専門職 |
| (4) 林業行政 | 伊藤博通 | 農林水産省林野庁指導部研究普及課研究企画官 |
| (5) 調査企画 | 鈴木昭彦 | JICA鉱工業開発調査部工業開発調査課 |
| (6) 通訳 | 藤園無邊 | (アルゼンティン国より参加) |

4 日程

- | | |
|----------|--------------------------------------------------------------------|
| 9月16日(水) | 東京発(11:00)→ニューヨーク着(10:30)(NH010)
ニューヨーク発(22:30)→ |
| 9月17日(木) | →ブエノスアイレス着(10:05)(UA979)
ブエノスアイレス発(11:00)→モンテビデオ着(11:50)(UA985) |
| 9月18日(金) | 大使館表敬、工業エネルギー省工業局との打ち合わせ |
| 9月19日(土) | 団内打ち合わせ |
| 9月20日(日) | 団内打ち合わせ |
| 9月21日(月) | 工業エネルギー省工業局との打ち合わせ、
大統領府企画・予算局訪問 |
| 9月22日(火) | 工業エネルギー省工業局との打ち合わせ、S/W及びM/M署名、
LATU訪問 |
| 9月23日(水) | 日本大使館報告、モンテビデオ発(18:50)→サンパウル着(21:10)(RG7929) |
| 9月24日(木) | サンパウル発(0:10)→ |

5 主要面会者

●工業エネルギー鉱業省

○Cr. Juan Guillermo Young

Director, National Direction of Industry (DNI)

○Ec. Yanina Corsini Valls

Director, Division Competitividad industrial, DNI

○Ing. Ag. Carlos Enrique Blasi Serrano

Sub Director, Division Competitividad industrial, DNI

○Dr. Esteban Marchelli

General Manager, Programa de Cooperacion con Japon, Technological Laboratory of Uruguay (LATU)

○Ing. Qco. Fernando Stotz

Coordinator, Programa de Cooperacion con Japon, LATU

○三上 隆仁 氏

顧問, LATU

●農牧水産省森林局

○Ing. Agr. Juan J. Puppo Perera

Chief, Department of Management and Forest Protection

●大統領府経済企画庁

○Ms. Mabel Gomez

Director, Cooperation Div.

○Mr. Mario Souto Diconca

Staff

●在ウルグアイ日本大使館

○石和田 洋 氏

大使

○大石 弘司 氏

一等書記官

II. 調査の結果

1 本格調査実施細則の締結

調査団側が提示したS/W案に基づき、DNIを始め、工業エネルギー鉱業省ウルグアイ技術研究所(LATU)及び農牧省森林局の関係者からなるウルグアイ側と本格調査実施細則について協議を行ったところ、以下の変更点を除いて対処方針の通りで合意にいたり、S/Wを締結した(別添S/W参照)。

(1) 調査対象サブセクターの「ボード類 (Wood-base board)」を「2次加工材 (Secondarily transformed wooden parts)」に変更

プロ形調査時の合意に基づき、調査対象サブセクターを以下の通りとしていた。

既存セクター：I)製材、II)合板、III)紙・板紙、IV)パルプ用丸太

未来セクター：I)パルプ用チップ、II)輸出用パルプ、III)ボード類

しかしながら、ウルグアイ側から調査対象の未来サブセクターに集合材等の二次加工材を含めたい旨の要望が出されたため、両者で協議を行った。その結果、林産工業製品として将来的に生産の可能性のあるものについてはできる限り広く網羅した調査を実施することが望ましいとの観点から、パーティクルボードのみを想定して挙げられていた未来サブセクターIII)ボード類 (Wood-base board) を二次加工材 (Secondarily transformed wooden parts) と変更し、二次加工材を広く調査対象とすることとした。

(2) 第1次現地調査期間を「2月からの2カ月間」から「3月からの1カ月間」に変更

調査団側は対処方針に基づき、第1次現地調査を2月から開始する案を提示した。しかしながらウルグアイ側は、必ずしも官公庁の業務や民間工場の操業が停止してしまうわけではないが、夏期休暇及びカーニバルにより2月の対応が困難であり、3月からの現地調査開始を希望した。調査団側は、第1次現地調査で実施予定の工場訪問調査において対象となる既存工場の数がそれほど多くなく、2カ月間を予定していた第1次現地調査は1カ月間程度で実施可能と判断し、3月からの開始で合意した。

なお、ウルグアイ側から説明された既存工場数は以下の通り。

サブセクター	工場数
製材	約320社 (内、比較的規模が大きいものは約10社)
合板	2社
製紙	4社
パルプ	2社
丸太 (パルプ用を含む)	5社 (零細を除く)
その他	家具; 400~500社 (輸入材を使用)

また、実施細則に関連し、以下についてM/Mにおいて確認した。

(3) 実施済みの関連調査の成果の活用について

本格調査においては、これまで実施されたJICAや他のドナー等による調査成果を取りまとめ、踏まえた上で実施することとする。

なお、JICA以外が実施した調査の資料は、ウルグアイ側からコンサルタントに提供される。ウルグアイ側が例示した調査例は以下の通り。

①EUによる家具関連工業の振興を目的とした調査 (96年)

②チリのコンサルタントによる木材チップのモデル工場調査 (ウルグアイ政府予算による) (現在実施中)

(4) 本格調査における企業調査について

本格調査における企業調査はクエスチョンネアによる調査と訪問調査により実施される。調査対象工場については、主に大中規模企業から構成され、代表的な小企業も含む*企業のリストをウルグアイ側が作成し、10月中に在ウルグアイ日本大使館へ提出する。

※今回ウルグアイ側から、本調査実施にあたっては、大中規模企業だけでなく小企業のレベルまで視野に入れて欲しい旨コメントされている。

(5) 家具等、関連サブセクターの調査について

林産工業の現状調査の対象として、合意されたサブセクターに加え、家具等、関連するサブセクターについても調査を行うこととする。

協議では、ウルグアイ側から、国内の木材資源を原料とせずに生産を行っている家具等、調査対象として合意された既存サブセクターの以外にも関連するサブセクターがあり、これらも調査して欲しい旨の要望が出された。ウルグアイの林産工業の現状把握のためにはそれら関連するサブセクターの調査も必要であり、これらも調査対象とすることで合意した。

(6) セミナーの実施について

ウルグアイの林産工業の振興には、民間からの投資が必要であると思料されるところ、調査成果を広く知らしめ、提言するプロジェクトに対して国内外の投資家の投資を促進するため、セミナーを実施することで合意した。

2 本格調査のウルグアイ側実施体制について

プロ形調査時には、ウルグアイ側がワーキング・チームを組織して日本のコンサルタント・チームとともに共同で調査にあたること、またさらにステアリング・コミティを組織して調査のスムーズな実施に必要な調整等を行うことを合意していた。今回調査においては、それらの具体的な構成メンバーとその作業内容について協議し、合意した。

(1) ワーキング・グループ

構成メンバーは、以下の人材をそれぞれの機関から選出することとした。ただし、運輸公共事業省については参加確認の取り付けが間に合わなかったため、「協力メンバー」として位置づけることにした。

DNI : コーディネーター、エコノミスト

LATU : エンジニア

農牧省森林局 : 森林管理及び植林担当

運輸公共事業省 : 輸送インフラ担当

各メンバーの作業内容については別添M/M参照。なお、ワーキング・グループのメンバーは業務として調査に参加することを対処方針としていたが、各機関の職員数の少なさや、日常業務の態勢を考慮し、特に業務としては位置付けなかった。

(2) ステアリング・コミティ

構成メンバーは、ワーキング・グループと同じ4機関から選出し、M/Mでの確認はされなかったが、DNI局長など幹部クラスで構成されることで双方は了解した。作業内容については、調査実施における調整に加え、調査方針や報告について検討及び確認を行うこととして、双方は了解した。

3 その他

(1) 市場調査対象地域「Asia(especially Japan)」からespecially Japanの標記の削除

プロ形調査時のM/Mでは市場調査に関して「Asia(especially Japan)」の表記があったが、今回は対処方針に基づき、実際の調査では日本も有望市場として調査対象になるであろうことをウルグアイ側に説明の上、本調査が日本への林産工業製品輸出を目的とした調査であるとの誤解を生まないためにespecially Japanの表記を削除し、S/W及びM/Mにおいては「Asia」とのみ記載することを調査団側から提案したところ、ウルグアイ側は了解した。

(2) ウルグアイ側の調査成果の活用について

本調査の成果は具体的に以下の通りに活用される旨のコメントがウルグアイ側からあり、調査後の有効活用が期待される。

- ①現行法の範囲内で、林産工業振興のインセンティブを与えることを目的とした政令策定のための基礎資料
- ②林産工業振興のための新たな法律策定のための基礎資料
- ③林産工業に対する内外からの投資を促すための資料
- ④その他、政策決定のための資料

(3) 関連機関の訪問

①大統領府企画・予算局国際協力部

ウルグアイ国の援助窓口機関を訪問し、調査団側から本調査の概容説明と実施について協力依頼を行った。企画・予算局側からは、本調査はウルグアイの経済発展において重要であると認識しており、協力を惜しまない旨コメントがあった

②LATU

本調査実施においては、ワーキング・グループやステアリング・コミティの一員というだけでなく、セミナー時の会場提供など、調査の円滑な実施のために協力を得られることを確認した。

またLATUをC/Pとして実施されるプロジェクト「ウルグアイ林産品試験計画」のC/P研修として、2月もしくは3月にGeneral Managerの来日が検討されているが、その際本調査に関連して通産省技協課を訪問したい旨の依頼をされている。5

III. 本格調査の方向性

来年早々からの国内作業開始、3月の第1次現地調査実施を目指して、コンサルタントの選定等、調査実施準備を行う。

内容としては、林産工業分野について現状と将来性に対する調査を実施し、さらに将来的には輸出を視野に入れる必要があるところ、港を中心としたインフラ調査も内容に含める。その上で、ウルグアイ国の総合的経済開発の視点から調査を取りまとめる必要がある。

IV. 「ウルグアイ林産品試験計画」プロジェクトとの連携について

10月より開始された標記プロジェクトとは、収集資料や分析結果の情報交換等、双方の実施成果助長のため可能な限り連携を図ることとしており、以下の連携事項に加え、更なる連携の方法を林業技術協力課等と検討する。

(連携事項案)

- (1) 林産工業の現状や製品規格に係る情報交換
- (2) 林産工業開発基本計画を、プロ技で実施予定の品質評価試験法の確立や品質管理技術改善活動によって得られうる成果を盛り込んで策定

第2部 資料

III. 本格調査の方向性

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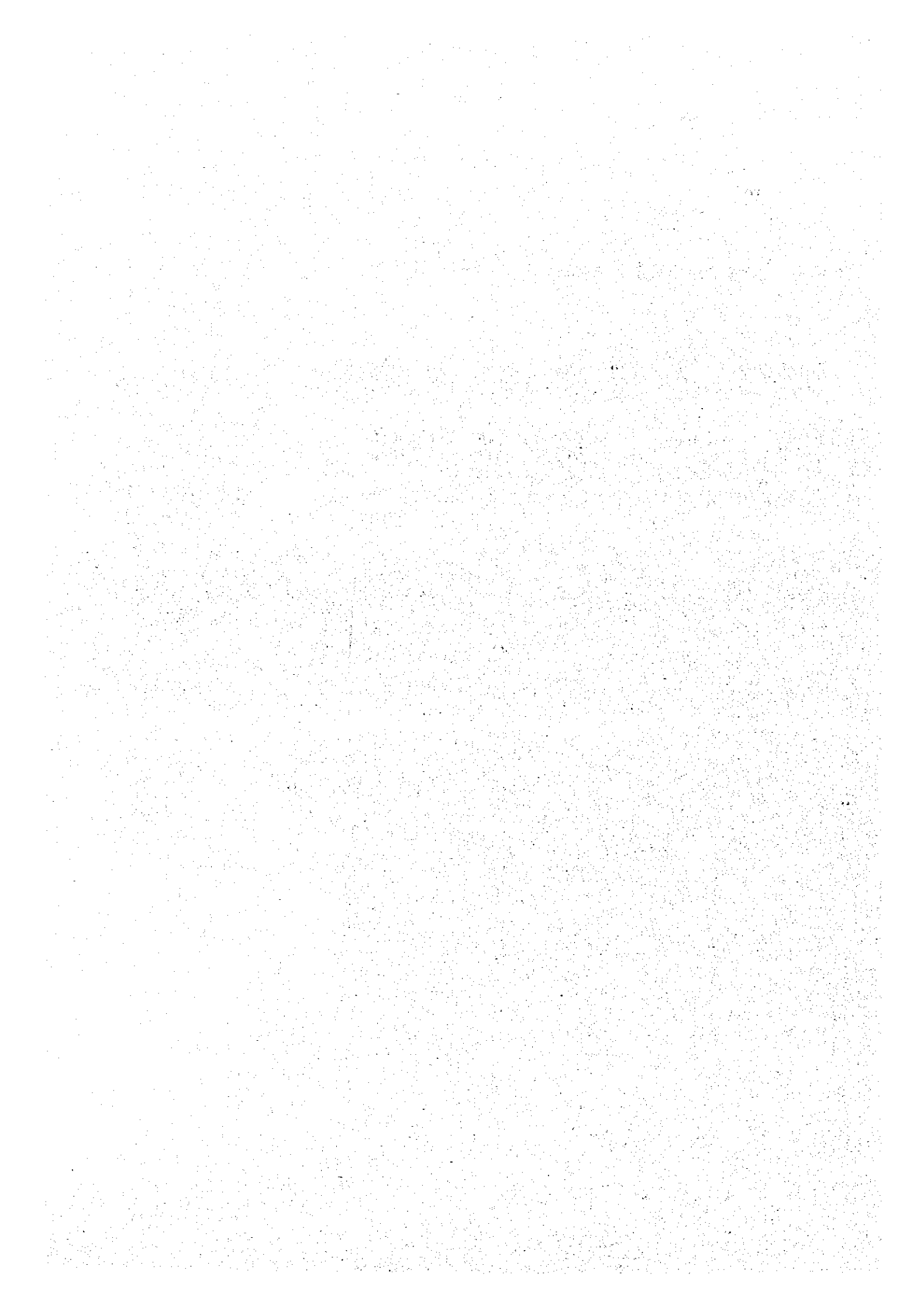
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第2部 資料



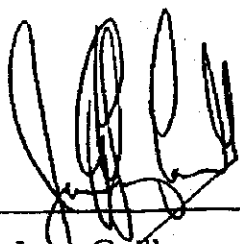
SCOPE OF WORK
FOR
THE STUDY ON
THE BASIC PLAN
FOR
THE FOREST INDUSTRY DEVELOPMENT IN
URUGUAY

AGREED UPON BETWEEN

THE MINISTRY OF INDUSTRY, ENERGY AND MINING
AND

THE JAPAN INTERNATIONAL COOPERATION AGENCY

Montevideo, September 22, 1998



Cr. Juan Guillermo Young
Director,
National Direction of Industry (DNI),
Ministry of Industry, Energy and
Mining



Mr. Toshinobu KATO
Leader,
Preparatory Study Team, Japan
International Cooperation
Agency

1 INTRODUCTION

In response to the request of the Government of the Oriental Republic of Uruguay (hereinafter referred to as "Uruguay"), the Government of Japan decided to conduct the Study on the Master Plan for the Forest Industry Development in Uruguay (hereinafter referred to as "the Study") in accordance with the relevant laws and regulations in force in Japan.

Accordingly, the Japan International Cooperation Agency (hereinafter referred to as "JICA"), the official agency responsible for the implementation of the technical cooperation programs of the Government of Japan, will undertake the Study in close cooperation with the authorities concerned of Uruguay.

The present document sets forth the scope of work for the Study.

2 OBJECTIVE OF THE STUDY

To compile a report, based on which the Government of Uruguay will develop its master plan for the forest industry development, to be used as a guideline by which the private sector is encouraged to promote investment and to improve its international competitiveness.

3 SCOPE OF THE STUDY

The Study shall cover the following items:

1 General background review

- (1) Present Situation of Socio-Economy
- (2) Present Situation of Industrial Sector
- (3) National Industrial Development plan
- (4) Present Situation for Transportation Infrastructure
- (5) Environmental Conservation Measures

2 Review of forestry and forest industry in Uruguay

- (1) Present Situation of Forestry
 - 1) Forestation
 - 2) Production Amount of major Products
 - 3) Domestic Sales and Distribution
 - 4) Exports and Imports of Forestry Products
 - 5) Labor Condition
- (2) Present Situation of Forest Industry
 - 1) Subsector-wise* Production Review
 - (a) Production Amount of major Products
 - (b) Factory Review on Site, Scales
 - (c) Raw Materials Procurement and Management

- (d) Production Technologies (Production Management, Product Quality, Productivity, Inventory Control, Human Resources)
- (e) Energy Supply and Control
- 2) Company Management
- 3) Domestic Sales and Distribution
- 4) Exportation
- 5) Labor Condition
- 6) Industrial Pollution Control
- 7) Investment
 - (a) Domestic Capital
 - (b) Foreign Capital
- (3) Policy and Administration for Forest Industry Development

3 Market Survey of Industry Product

- (1) Domestic Market
- (2) Market in Middle and South America
 - 1) Mercosur
 - 2) Other Countries
- (3) World Market
 - 1) North America
 - 2) Europe
 - 3) Asia
 - 4) Other Area

4 Formulation of a Guideline for Forest Industry Development in Uruguay

- (1) Estimation of Forestry Production
- (2) Forecast Future Vision of Forest Industry
 - 1) Forecast Production
 - 2) Market
 - 3) Future Vision and Development Strategy
- (3) Formulation of a Guideline for Development of Existing Sub-sectors
 - 1) Production
 - (a) Production Output of each Product
 - (b) Technical Improvement of Production
 - 2) Investment
 - 3) Appropriate Site for Factories
 - 4) Target Market for each Product
- (4) Formulation of a Guideline for Development of Newly Created Sub-sectors
 - 1) Production (Production Output of each Product)
 - 2) Investment
 - 3) Appropriate Site for Factories
 - 4) Target Market
- (5) Formulation of a Guideline for Development of whole Forest Industry Sector
 - 1) Production Output

- 2) Investment
- 3) Export Promotion
- 4) Infrastructure for Transportation
- 5) Industrial Pollution Control
- 6) Human Resources Development
- (7) Evaluation of the Guideline for Development of Forest Industry Sector
 - 1) Total Amount of Production
 - 2) Estimation of Employment Creation
 - 3) Obstacles for Development of Forest Industry and Countermeasures

5 Project Proposals for Forest Industry Development

- (1) Selection of Priority Sub-sectors
- (2) Technical Advises and Improvement in Priority Sub-sectors
- (3) Action Plan for Priority Sub-sectors Development Projects

6 Recommendation of Policy Measures

- (1) Forestry Industry Development Promotion
- (2) Infrastructure Development
- (3) Industrial Pollution Control

※The Study takes up the following four existing sub-sectors and three future sub-sectors

- a. existing sub-sectors: Sawnwood, Plywood, Pulp and Paper, Pulp-log
- b. future sub-sectors: Pulp chips, Pulp for Export,
Secondarily Transformed Wooden Parts

4 WORK SCHEDULE OF THE STUDY

The tentative schedule of the Study is attached as Annex.

5 REPORTS

JICA shall prepare and submit the following reports to the Government of Uruguay in accordance with the work schedule.

- Twenty (20) copies of the Inception Report in Spanish
- Twenty (20) copies of the Progress Report(1) in English
- Twenty (20) copies of the Interim Report in Spanish
- Twenty (20) copies of the Progress Report(2) in English
- Thirty (30) copies of the Draft Final Report in Spanish

Thirty (30) copies of the Final Report in Spanish

6 UNDERTAKINGS BY THE GOVERNMENT OF URUGUAY

1 The Government of Uruguay shall accord privileges, exemptions, and other benefits the Japanese study team (hereinafter referred to as "the Team") in accordance with the agreement on Technical Cooperation between the Government of Japan and the Government of Uruguay.

2 To facilitate smooth conduct of the Study, the Government of Uruguay shall take necessary measures:

- a) To secure the safety of the Japanese Study Team (hereinafter referred to as "the Team");
- b) To permit the members of the Team to enter, leave and sojourn in Uruguay for the duration of their assignment therein, and exempt them from foreign registration requirements and consular fees;
- c) To exempt the members of the Team from taxes, duties and other charges on equipment, machinery and other materials brought into, and out of, Uruguay for the conduct of the Study;
- d) To exempt the members of the Team from income taxes and charges of any kind imposed on, or in connection with, any emoluments or allowances paid to the members of the Team for their services in connection with the implementation of the Study;
- e) To provide necessary facilities to the Team for remittance as well as utilization of the funds introduced into Uruguay from Japan in connection with the implementation of the Study;
- f) To secure permission for entry into private properties or restricted areas for the implementation of the Study;
- g) To secure permission for the Team to take all data and documents including photographs and maps related to the Study out of Uruguay to Japan; and
- h) To provide medical service as needed. Its expenses will be charged on members of the Team.

3 The Government of Uruguay shall bear claims, if any arises, against the member of the Team resulting from, occurring in the course of, or otherwise connected with

the discharge of their duties in the implementation of the Study, except when such claims arise from gross negligence or willful misconduct on the part of the Team.

- 4 The National Direction of Industries (DNI), Ministry of Industry, Energy and Mining, in collaboration with relevant authorities, shall act as counterpart agency to the Team and also as a coordinating body in relation with other governmental and non-governmental organizations concerned for the smooth implementation of the Study.
- 5 The Government of Uruguay shall organize a steering committee for the purpose of smooth and effective implementation of the Study, and its secretariat shall be set up within DNI.
- 6 DNI shall, at its own expense, provide the Team with the following in cooperation with other organizations concerned :
 - a) Available data and information related to the Study;
 - b) Counterpart personnel;
 - c) Suitable office space with necessary equipment and facilities at the project site and
 - d) Credentials or identification cards.

7 UNDERTAKINGS BY JICA

For the implementation of the Study, JICA shall take the following measures :

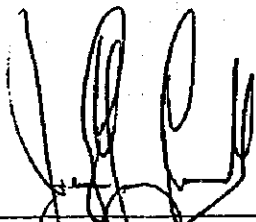
- 1 To dispatch, at its own expense, a series of study teams to Uruguay
- 2 To pursue technology transfer to the Uruguay counterpart personnel in the course of the Study.

8 OTHERS

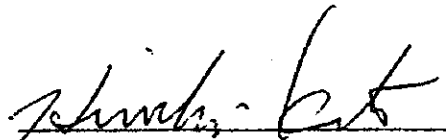
JICA and DNI shall consult with each other in respect of any matters that may arise from, or in connection with, the Study.

MINUTES OF MEETING
OF
A PROJECT FORMULATION STUDY
ON
THE BASIC PLAN
FOR
THE FOREST INDUSTRY DEVELOPMENT
IN
THE ORIENTAL REPUBLIC OF URUGUAY

Montevideo, July 28, 1998



Cr. Juan Guillermo Young
Director
National Direction of Industry (DNI)
Ministry of Industry, Energy
and Mining (MIEM)



Mr. Hiroshi Kato
Leader
Project Formulation Study Team
Japan International Cooperation
Agency (JICA)

A Japanese Project Formulation Study Team ("the Team") organized by the Japan International Cooperation Agency ("JICA") and headed by Hiroshi KATO visited the Oriental Republic of Uruguay ("Uruguay") from July 14th to 29th, 1998, for the purpose of studying the possibility of implementing a development study project: a study on the Basic Plan for the Forest Industry Development in Uruguay ("the Study"). After intensive discussions, the Team and the Uruguay authorities concerned ("the Uruguay side") agreed to confirm the following points for consideration by their respective governments:

I Overall Evaluation and Conclusions

The Team and the Uruguay side ("both sides"), confirmed that prompt implementation of the Study is highly justified in view of the need for compiling a general guideline for forest industry development in Uruguay (See II below.).

Both sides also tentatively agreed on the framework of the Study (See III below.), while maintaining that it is subject to further discussion and modification.

Further, both sides shared an understanding that the Study should be taken as a joint collaborative work. The Uruguay side in this connection assured that necessary inputs in terms of human resources and others will be secured to the maximum possible extent (See IV below.).

Based on the agreement and confirmations thus reached, the Team stated that upon its return to Japan, it is prepared to recommend the Government of Japan take up the Study as a project for the Japanese fiscal year 1998. The Uruguay side welcomed this remark, while understanding that the Team is not endowed with a mandate to make a commitment, and that the final decision will be made by the Government of Japan.

II Justification of the Study

Sharing the information, as summarized below, provided by the Team it gathered during its field survey and by the Uruguay side, both sides confirmed the implementation of the Study is highly justified:

- 1 Since the Government of Uruguay established the new Forestation Law in 1987, the area of the forest plantation has increased remarkably. It is estimated that the target of 200,000 hectares of the forestation, set forth in the Second 5-Year Forestation Plan, will be realized at the end of 1999. As a result of such steady efforts by the Government of Uruguay for forestry development, the volume of wood being grown annually has come to exceed

the volume of wood being consumed by the forest industry in Uruguay, which is only scarcely developed. If left untouched, this condition will inevitably result in ineffective use of the wood resources, where much of forest resources will be used for purposes with little added-value, or even worse, be left in the forest totally unutilized

It is needed, therefore, to compile a guideline for forestry industry development, along which various forest industries are promoted to make efficient use of wood for the development of the Uruguay economy.

- 2 With some exceptions, existing mills in the forest industry in Uruguay still have large room for improvement, both technically and in management, if they want to have sufficient competitiveness in today's borderless international market. Accordingly, it would be extremely worthwhile for such Uruguay industry, if guidance will be provided on sound production and management, as part of the activities of the Study.

Both sides also noted that the Study, if implemented, would be highly consistent with the past Uruguay-Japan cooperation projects in the field of forestry and forestry-related industries, which have produced very fruitful achievements, part of which is exemplified in paragraph 1 above.

Further, recalling that the two Governments are considering to start another project titled the Forest Products Testing Project shortly, both sides agreed that, if properly designed and implemented, the said project and the Study can be complementary to each other, which, together, would produce far greater benefits than either one of them would produce individually.

III Framework of the Study

<Outline of the Study>

On the basis of the official application submitted by the Government of Uruguay to the Government of Japan in October 1997, both sides discussed the framework of the Study and tentatively agreed as follows, while understanding that it is subject to further discussion and modification, as necessary:

1. Objective of the study

To compile a report, based on which the Government of Uruguay will develop its master plan for the forest industry development, to be used as a guideline by which the private sector is encouraged to promote investment and to improve its international competitiveness.

2. Area to be covered by the Study

- (1) Southern Area along the River 'Rio de la Plata' and the Atlantic Ocean
- (2) Western Area along the River 'Uruguay'
- (3) Northern Area
- (4) Central Area
- (5) South-eastern Area

3. Scope of the Study

(1) Market Survey

To evaluate the potentials for exports of forest industry products, the Study will undertake market surveys covering the entire world, including Mercosur, Europe, North-America and Asia (especially Japan), but with different degree of depth for different regions depending on their potentials. This market survey will be conducted basically by reviewing existing literature and statistics

(2) Estimation of Wood Production in Uruguay

This will be done on the basis of the information provided by the Ministry of Cattle Breeding, Agriculture and Fishery, and will cover Eucalyptus and Pine, and the term of 1999-2019.

(3) Sub-sectors to be studies

- a. Existing sub-sectors: Sawnwood, Plywood, Pulp and Paper, Pulp-log
- b. Future sub-sectors: Pulp chips, Pulp for Export, Wood-Base Board

(4) Environmental Countermeasures

Industrial pollution control measures in forest industry mills will be studied.

(5) Development Plan

a. Each Sub-sector

- Production Capacity of Mill
- Amount of investment
- Sites or Areas
- Number of workers (estimates only)

b. Sector(total sub-sector)

- Production Amount
- Amount of export
- Total Investment
- Transport (Land/Sea/Ports) (will not include detailed recommendations)
- Number of workers (estimates only)

(6) Financial and Economic Analysis

Financial and economic analysis will be implemented on suggested model projects and for selected target sub-sectors. The analysis on individual projects will be detailed enough to attract the attention of potential investors, both domestic and foreign. The analysis for the sub-

sector will inevitably be less quantitative.

The target sub-sectors and model projects will be selected in the course of the Study, evaluating their potentials for future development.

5. Expected major outputs of the Study

- (1) Master Plan of the Forest Industry Development (long term plan)
- (2) Guide-line for the private subsectors
- (3) Administrative guidance by the Government

<Flow of the Study>

Based on the above mentioned tentative agreement on the framework of the Study, both sides then went on to discuss the study flow based on the flow chart given as Annex II, while, again, understanding that it is tentative and subject to further discussion.

IV Institutional Setup for the Implementation of the Study

- 1 Both sides agreed that the Study is going to be a joint study project, in which both the experts and staff of Uruguay and Japan will actively participate as partners. In this connection the Uruguay side assured that it would secure necessary resources, including assigning a reasonable number of counterpart personnel to work for the Study, who will form a working group. The tasks of the Working Group members will include such works as data analysis and report writing, in addition to provision of various facilities and information to the Japanese study team.
- 2 The Uruguay side stated that the National Direction of Industry of the Ministry of Industry, Energy and Mining (DNI) will act as the main counterpart body to JICA for the implementation of the Study. Both sides understood that for smooth implementation of the Study, a steering committee for the Study will be organized, with its secretariat being established within DNI. The Steering Committee will be composed of the representatives of relevant organizations such as the following, details of which will be worked out later when the Study is started officially:
 - DNI
 - LATU (Laboratorio Tecnológico del Uruguay)
 - the Forest Department, Ministry of Cattle Breeding, Agriculture and Fishery

V Others

1. Study Schedule

The Uruguay side requested prompt implementation of the Study, in view of the political calendar in Uruguay including an election planned in late 1999. The Team replied that it would make its best efforts to expedite the administrative procedure and to start the Study in the Japanese fiscal year 1998, once a favorable decision is made by its home government.

2. Undertaking for the Study

Both sides basically agreed that, if the Study is to be implemented, the Uruguay side and JICA would take responsibilities for the Study respectively, as shown in Annex-III, which will be confirmed in the Scope of Work (S/W), a document to be signed at the time of official commencement of the Study.

List of Members of the Uruguay side and Japanese Delegations

Uruguay Side

National Direction of Industry (DNI), Ministry of Industry, Energy International Cooperation and Mining (MIEM)

Cr. Juan Guillermo Young	Director of DNI
Ec. Yanina Corsini Valls	Director, Division Competitividad industrial
Ing. Ag. Carlos Enrique Blasi Serrano	Sub Director, Division Competitividad industrial

Technological Laboratory of Uruguay (LATU), MIEM

Ing. Qco. Fernando Stotz	Coordinator, Programa de Cooperacion con Japon
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Department of Management and Forest Protection, Forest Division, Ministry of Cattle Breeding, Agriculture and Fishery

Ing. Agr. Juan J. Puppo Perera	Cheif of the Departmen
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Japanese Side

JICA Project Formulation Study Team

Mr. KATO, Hiroshi	Director; Industrial Development Study Division, Mining and Industrial Development Study Department, Japan International Cooperation Agency
Mr. SATO, Kazuchika	JICA Development Specialist
Mr. Mr. INADA, Masahiro	Staff; Development Cooperation Division, Economic Cooperation Bureau, Ministry of Foreign Affairs
Mr. Mr. MORI, Tomonori	Staff; Housing Industry, Ceramics and

Construction Materials Division, Consumer
Goods and Service Industries Bureau, Ministry
of International Trade and Industry

Mr. NAGAI, Hiroshi

Assistant Director, Silviculture and Protection
Division, Private Forest Department, Forestry
Agency

Mr. SUZUKI, Akihiko

Staff; Industrial Development Study Division,
Mining and Industrial Development Study
Department, JICA

Mr. FUJISONO, Muhen

Translator

the Embassy of Japan

Dr. OISHI, Koji

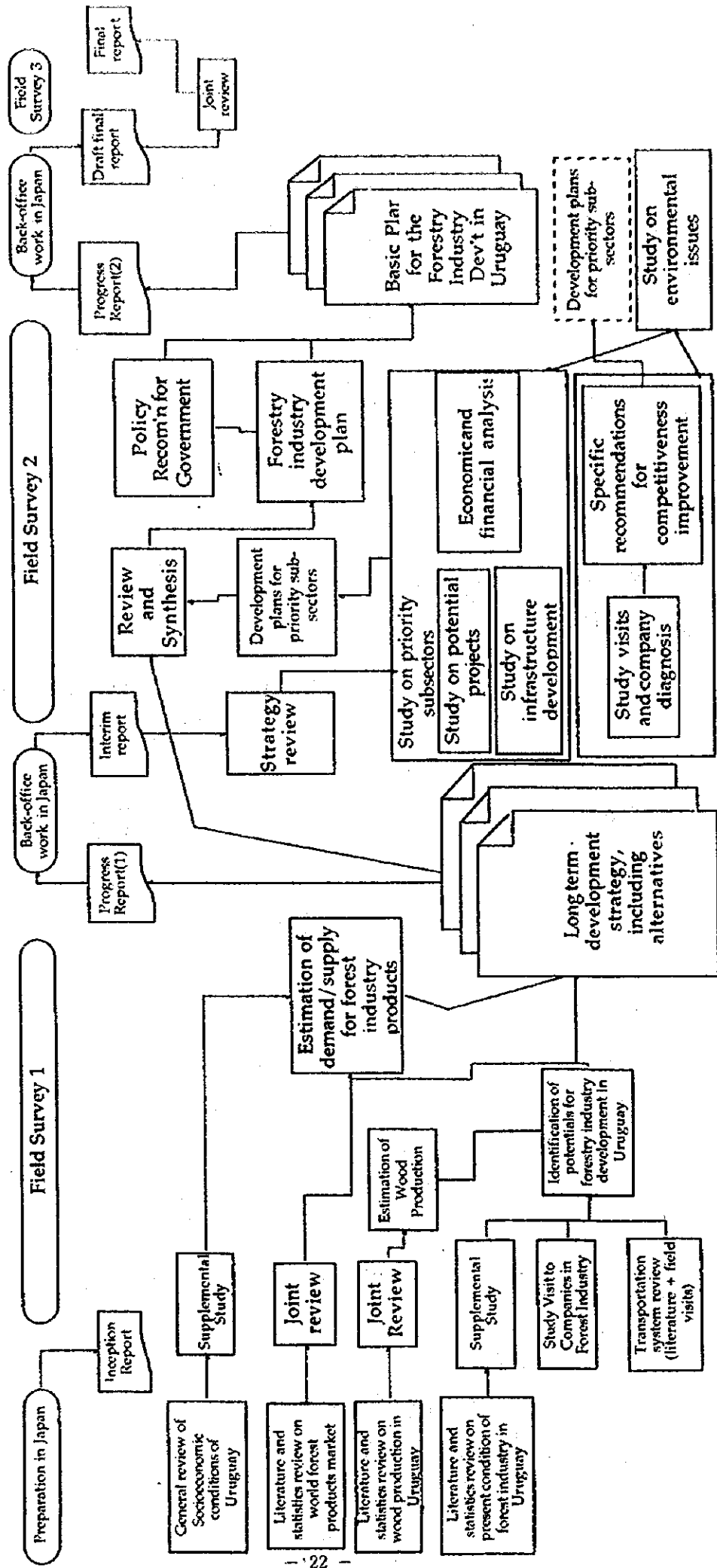
Primer Secretario

Mr. IMAZU, Takehiko

Departamento Economico Comercial y de
Cooperacion Tecnica

Annex II

Tentative Flow of the Study



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JK

Undertakings of The Uruguay and Japanese Sides for The Study

1. Undertakings of the Government of Uruguay

(1) To facilitate smooth conduct of the Study, the Government of Uruguay shall take necessary measures:

- to secure the safety of the Japanese study team,
- to permit the members of the Japanese study team to enter, leave and sojourn in Uruguay for the duration of their assignment therein, and exempt them from alien registration requirements and consular fees,
- to exempt the members of the Japanese study team from taxes, duties and other charges on equipment, machinery and other materials brought into, and out of , Uruguay for the conduct of the Study,
- to exempt the members of the Japanese study team from income taxes and charges of any kind imposed on, or in connection with, any emoluments or allowances paid to the members of the Japanese study team for their services in connection with the implementation of the Study
- to provide necessary facilities to the Japanese study team for remittance as well as utilization of funds introduced into Uruguay from Japan in connection with the implementation of the Study
- to secure permission for entry into private properties or restricted areas for the implementation of the Study
- to secure permission for the Japanese study team to take all data and documents including photographs and maps related to the Study out of Uruguay to Japan, and
- to provide medical services as needed. Its expenses will be chargeable on the members of the Japanese study team.

(2) The Government of Uruguay shall bear claims, if any arises, against the members of the Japanese study team resulting from, occurring in the course of, or otherwise connected with, the discharge of their duties in the implementation of the Study, except when such claims arise from gross negligence or willful misconduct on the part of the members of the Japanese study team.

(3) The National Direction of Industries (DNI), Ministry of Industry, Energy and Mining, shall act as the counterpart agency to the Japanese study team and also as a coordinating body in relation with other governmental and non-governmental organization concerned for the smooth implementation of the Study.

(4) DNI shall, at its own expense provide the Japanese study team with the following, in cooperation with other organizations concerned:

- available data and information related to the Study

- counterpart personnel
- suitable office space with necessary equipment in Montevideo, and
- credentials or identification cards

2. Undertakings by JICA

For the implementation of the Study, JICA shall take the following measures :

- To dispatch, at its own expense, the Japanese study teams to Uruguay
- To pursue technology transfer to the Uruguay counterpart personnel in the course of the study.

JICA