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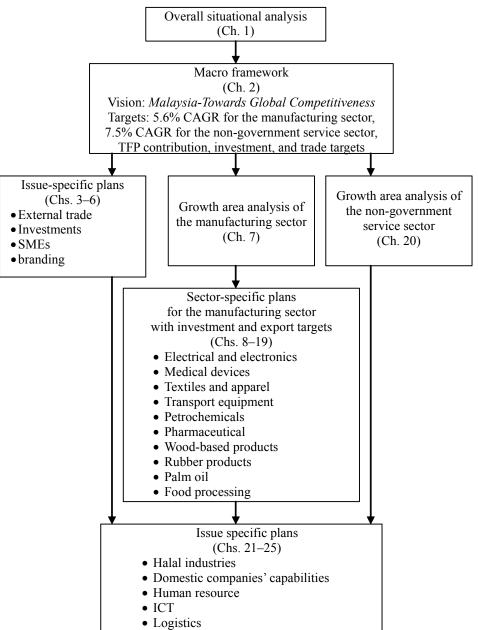
Appendix 1

Master Plan Structure: A Summary

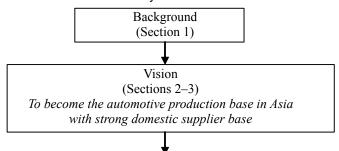
|   | Туре              | Years     | Pages | Language            | Contents |         |                    |               |              |
|---|-------------------|-----------|-------|---------------------|----------|---------|--------------------|---------------|--------------|
| Master Plan   |                   |           |       |                     | Vision   | Targets | Situation analysis | Policy issues | Action plans |
| Malaysia: Third Industrial<br>Master Plan                                     | Overall           | 2006–2020 | 674   | English             | 0.4%     | 4.7%    | 66.2%              | 28.6%         | 0%           |
| Thailand: Automotive Industry (exec. summary)                                 | Sector specific   | 2002–2006 | 19    | English             | 6.7%     | 2.7%    | 0%                 | 10.7%         | 80.0%        |
| Thailand: Automotive Industry (exec. summary)                                 | Sector specific   | 2007–2011 | 20    | English             | 5.0%     | 10.0%   | 5.0%               | 0.0%          | 80.0%        |
| Thailand: Automotive Industry   | Sector specific   | 2007–2011 | 227   | Thai                | 0.5%     | 2.5%    | 78.9%              | 0.0%          | 18.1%        |
| Thailand: Small and Medium<br>Enterprises Promotion<br>(exec. summary)        | Issue<br>specific | 2007–2011 | 38    | English             | 10.0%    | 33.4%   | 43.6%              | 0.0%          | 7.7%         |
| Thailand: Supporting Industries (exec. summary)                               | Issue specific    | 1995      | 38    | Thai and<br>English | 6.7%     | 2.7%    | 0%                 | 10.7%         | 80.0%        |
| Thailand: Food Industry (exec. summary)                                       | Sector specific   | ?         | 9     | English             | 27.8%    | 0%      | 11.1%              | 22.2%         | 38.9%        |
| Thailand: Leather, Leather<br>Goods, and Footwear Industry<br>(exec. summary) | Sector specific   | 10 years  | 6     | English             | 3.8%     | 3.8%    | 53.8%              | 34.6%         | 3.8%         |
| Indonesia: National Industrial Development Policy                             | Overall           | 2005–2025 | 238   | English             | 2.1%     | 12.2%   | 29.8%              | 55.9%         | 0%           |
| India: The National Strategy for Manufacturing                                | Overall           | 2006–2015 | 78    | English             | 2.6%     | 2.6%    | 16.7%              | 78.2%         | 0%           |
| India: Industrial Policy of<br>Maharashtra State                              | Overall           | 2001–2006 | 10    | English             | 10.0%    | 0%      | 25.0%              | 65.0%         | 0%           |

Note: Page numbers and content proportions are for the main text only; appendices are not counted. Action plans include both full action plan matrices and short listings of required actions.

# Appendix 2 Malaysia: Third Industrial Master Plan (IMP3) 2006–2020



Thailand: Master Plan for Thai Automotive Industry 2002–2006, Executive Summary



### Targets

(Section 4)

- To produce annually over 1 million cars and over 2 million motorcycles
- To export parts over 200 billion baht in 2006
- To achieve 70% local value addition

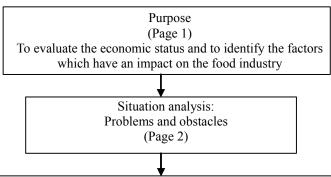
## Policies (Section 5)

- To create predictable environment (business intelligence unit, HRD, market expansion, good governance, infrastructure)
- To enhance competitiveness of auto parts industry (trade promotion and networking, standardization, manufacturing technology and management, product technology, HRD)

## 15 action plans (Section 6)

(1) Situation analysis, (2) information center, (3) training center, (4) engineer development, (5) certification system, (6) market responsiveness, (7) tax structure research, (8) infrastructure planning, (9) cluster-based development, (10) standards, (11) standard testing center, (12) R&D center, (13) export promotion center, (14) supplier development program, (15) product development

Thailand: Master Plan for Thai Food Industry, Executive Summary



## Visions and strategies (Page 3)

- To be a leader in the export of high value-added food products (fishery, cereal, fruits and vegetables, and meat products)
- To produce value-added products from sugar and tapioca for export
- To take action for the development and transformation of the entire food value chain

## Policy issues (Page 4)

- Four bodies of the central agency responsible for food industry promotion have to operate simultaneously and coordinate systematically
- Raise competitiveness and standards through human resource development, development of technology management systems, and adapting appropriate technology

## List of actions (Pages 4–9)

- (1) To build capacity for competitiveness
  - Policy setting and planning (2 plans)
  - Industrial cost management (3 plans)
  - Development in science and technology (8 plans)
  - Marketing (7 plans)
  - Food safety (7 plans)
- (2) To create networks and linkages within and between industrial groups
  - Food industry information (3 plans)
  - Cooperation, networking between industrial groups and international networking (3 plans)

Thailand: Master Plan for Leather, Leather Goods and Footwear Industry, Executive Summary



• Role of government

### Vision (Section 4)

"Thailand: Asian Footwear and Leather Goods Center" or "Thailand's Leather Goods: Italy of the East"

### **Targets** (Section 4)

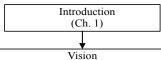
- To export US\$2 billion annually in 3 years
- To export US\$3 billion annually in 7–10 years

### Policy Issues (Section 4)

- Proactive marketing
- R&D
- Brand and country image creation
- Production and management development
- Cluster/linkage creation
- Rules and regulations

**Action Plans** (Section 4) 16 programs and 57 projects

### Indonesia: National Industrial Development Policy



### (Chap. 2)

Vision: to become a strong industrial nation in the world

- Strong and sustainable industry with strong basis of science and technology
- Strong industrial structure with linkages between SMEs and large-scale enterprises
- Balanced growth between SMEs and large scale enterprises
- · Well distributed industries throughout Indonesia

### Situation Analysis

(Chs. 3, 4, 5)

- Export potential industries (natural resource intensive industry, labor intensive industry, capital intensive industry, technology intensive industry)
- · Domestic market potential industries

### Targets (Ch. 6)

### Mid-term objectives (2004–2009)

- · Increase labor absorption
- Increase export and empower domestic market
- · Increase contribution to economic growth
- · Improve technology
- Diversify industrial structure and products
- Spread development throughout Indonesia

### Long-term objectives (2010-2025)

10% growth per annum

- Create world class industries
- Increase the role of prioritized industries
- Increase the role of SMEs in industrial structure

#### Policy issues (Ch. 6)

#### Main Strategy

- Strengthen the linkage at all value chain levels
- Increase added value along the value chain
- Increase productivity, efficiency, and variety of resources with focus on the use of green products
- Develop SMEs

#### Operational Strategy

- Develop conductive and convenient business environment
- Encourage the development of priority industrial clusters

#### Sub-sectoral development policy for 10 core industries (Ch. 7)

(1) Food and beverage, (2) marine product, (3) textile and textile products, (4) footwear, (5) palm, (6) wood products, (7) rubber and rubber products, (8) pulp and paper, (9) electric machinery and equipment, (10) petrochemical

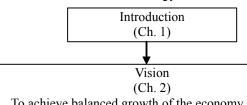
Spatial planning for the core industries (Ch. 8)

Institutional framework for implementation (Ch. 9)

#### Exhibits:

- (1) Analysis on international competitiveness
- (2) Map of technological development for prioritized industries
- (3) Export-import development (2002–2004)
- (4) Projected growth 2005-2009

India: National Strategy for Manufacturing



To achieve balanced growth of the economy and generate adequate employment (it is necessary to increase employment without sacrificing competitiveness)

Targets (Ch. 2)

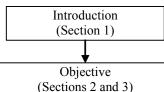
Manufacturing growth of 12 % or above per annum to achieve 8–9% GDP growth; this will generate over 1.6 million additional employment per annum

### Policy Issues

(Chs. 3 and 4)

- Ensuring macroeconomic stability (duties, taxes, and subsidies; FDI; interest rates; labor laws)
- Strengthening education and skill building, and creation of "Centres of Excellence in Manufacturing Technologies"
- Investing in innovation and technology
- Infrastructure development
- Providing the right market framework and regulatory framework
- Enabling SMEs to achieve competitiveness (cluster approach, application of lean manufacturing)
- Enabling public sector enterprises to meet competitive market conditions
- Encouraging intellectual property rights
- Increasing the usage of ICT
- Improving firm level competitiveness
- Benchmarking against best practices
- Sub-sector engagement (textiles and garments, leather and leather products, auto components, drugs and pharmaceuticals, food processing, and IT hardware)

# Appendix 8 India: Industrial Policy of the State of Maharashtra



To further accelerate the flow of investment in industry and infrastructure, promoting IT, high-tech, knowledge based and biotech industries, augmenting exports from the industrial units in the State and creating large scale employment opportunities

# Policy Issues (Section 5)

- Incentive provision to new investment in C, D, D+ and no-industry districts
- Establishment of Industrial Townships, Special Economic Zones, and Specialized Industrial Areas
- Promotion of education and research institution
- Captive power generation
- Gas cooperation agreement
- Review labor laws and procedures
- Promotion of film industry

Monitoring System (Section 6)