

YUGOSLAVIA

*A Guide
for Canadian Exporters*

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A Guide for Canadian Exporters

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Yugoslavia in a Nutshell

Capital — Belgrade
Area — 255,804 km²
Population — 22.8 million
Principal Language — Serbo-Croat
Current President (presidency rotates annually) —
Sinan Hasani (until May 1987)
Prime Minister — Branko Mikulic (until May 1987)



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I. THE COUNTRY

Introduction

The largest country on the Balkan Peninsula, Yugoslavia, or the Socialist Federal Republic of Yugoslavia (SFRJ) has an area about half the size of Manitoba and a population slightly smaller than Canada's. Although possessing a long coastline on the Mediterranean, it has borders with seven countries: Italy, Austria, Hungary, Bulgaria, Greece, Romania and Albania. Yugoslavia is a federal state, composed of six constituent republics (Serbia, Croatia, Bosnia and Herzegovina, Slovenia, Macedonia and Montenegro), and two autonomous provinces (Kosovo and Vojvodina). Belgrade is both the federal capital and the country's largest city, with 1.4 million inhabitants. Other major regional centres include, in order of size: Zagreb, Sarajevo, Ljubljana and Skopje. Twenty-one percent of Yugoslavia is mountainous, while 56 percent is suitable for agricultural production. The country consists of three topographical regions: 1) the Northern plain, which covers one-fifth of the whole territory, is the country's main producer of grain, livestock, and dairy products; 2) the mountainous regions, which contain mineral and forest resources and are endowed with numerous valleys suitable for agricultural production; and 3) the coastal region, with its Mediterranean climate, which is important mainly for tourism, but is also capable of producing citrus fruits, grapes and figs.

History and Government

Yugoslavia is a young country, formed in 1918 after the dissolution of the Austro-Hungarian and Ottoman Empires; its present frontiers were not decided on until 1954. Because the population was made up of several ethnic groups, its history between the world wars was marred by internal antagonism between cultural, linguistic and religious communities, some of which fought each other during World War II. By 1945 an effective resistance movement against the Axis gave victory and political power to the Partisans under Marshal Tito and to the Communist ideology they espoused.

If for a short period after the war Yugoslavia emulated the Soviet model of economic development and political authoritarianism, its ties with the Soviet Union were abruptly broken in 1948. The rupture came as a result of Tito's refusal to tolerate Stalin's intervention in Yugoslav affairs, and was sustained by the fact that Partisans had liberated most of Yugoslavia's territory before the Soviet army arrived and Communist rule had been effectively established without significant Soviet involvement.

Since then, Yugoslavia has charted its own domestic and foreign policies quite independently of the other Communist states, while maintaining a one-party system led by the League of Communists of Yugoslavia. The party seeks to guide and influence rather than command the political and economic life of the nation. In 1950 it introduced a unique socialist system of decentralized "workers' self-management," under which the means of production (i.e. factories, banks, etc.) are owned and managed by the workers themselves, and are exploited to their direct benefit. Yugoslavia's foreign policy emphasizes avoidance of domination by either the East or the West.

Yugoslav Federalism

While Yugoslavia is a highly decentralized federation, the responsibilities of the Federal Government include the formulation and co-ordination of national policy with regard to the economy, external relations and defence. Particular attention is devoted by federal authorities to the reduction of the severe regional disparities existing between the richer northern portions of the country and the much poorer ones in the South. Republics enjoy wide decision-making powers in administrative, economic and political matters, their institutions duplicating closely those found at the federal level.

In foreign policy, Yugoslavia enjoys international political prominence as one of the founders of the "non-aligned movement." As a result, it entertains close ties with many developing countries of Asia, Africa and America.

The People

In 1982, the population of Yugoslavia stood at 22.6 million. Some 28 percent of the workforce is employed

in the agricultural sector, as compared to 37 percent in industry and 35 percent in services. The Serbs, Croats, Slovenes, Macedonians and Montenegrans are the main peoples, distinguished more by language, history and religion than by racial differences. Albanians, Hungarians and Turks form the largest minorities. The religion of Croatia and Slovenia is Roman Catholicism, whereas Orthodoxy is the principal confession of Serbians, Macedonians and Montenegrans. There are also large numbers of Moslems, particularly in the south.

While there is no Yugoslav language as such, three languages (Serbo-Croat, Slovenian and Macedonian) have federation-wide status. Serbo-Croat is the most widespread — some 80 percent of the population speak this language. Two important minority languages are Albanian and Hungarian. Two alphabets are used: the Latin, which can be read by most and is used throughout the western half of the country, and the Cyrillic, which is used in the southern regions. In Belgrade, almost all street names and public notices are in Cyrillic, whereas road signs are in the Latin alphabet.

II. ECONOMY AND FOREIGN TRADE

Yugoslavia is a socialist country, and remains committed to its ideals. Its economic system, however, differs radically from the highly centralized command economies of the Soviet Union and the East European Warsaw Pact states. In many respects the Yugoslav economy has as much in common with the market economies of Western Europe as with the planned socialist economies of Eastern Europe. Indeed, Yugoslavia is often termed a "socialist market economy."

Yugoslav enterprises, including banks, manufacturing, service and trading firms are operated neither privately nor by the state, but are "socially" owned. Legally belonging to the workers themselves, they are managed as independent economic units by boards elected by the workers, and compete with each other on domestic and foreign markets.

Federal and republican government bodies formulate and implement fiscal, monetary and economic development policies. Centralized planning and control as found in Eastern Europe have been abandoned in favour of a more informal system of "indicative" targets and priorities, which serve as framework for the policies of the republics and autonomous provinces, and are intended to educate and guide management at various levels in the formulation of their own planning.

Current policies are designed primarily to deal with the country's external debt of approximately \$21 billion (U.S.), reverse the balance-of-payments deficit (there was a \$274 million (U.S.) favourable current account balance in 1983), reduce the high rate of inflation, and bolster the dinar. To this end, foreign borrowing and domestic investment have become more selective and market-oriented, imports have been severely curtailed, prices have been frozen on occasion, and interest rates are being raised on dinar accounts. An increase in invisible earnings is being sought through encouragement of tourism and investment by both Yugoslavs abroad and foreign enterprises.

Meanwhile there is strong emphasis on export promotion, especially to convertible currency areas. To this end, priority is being given to the import of essential industrial raw materials and production goods, while domestic investment emphasizes only certain branches of industry which are directly or indirectly export-related. These are energy, raw materials, food processing and some engineering. In energy, ambitious targets are set for the expansion of coal, electricity and natural gas production. In raw materials, priority is given to the production of ferrous and non-ferrous metals, non-metallic minerals and some basic chemicals. Food processing is to expand in accordance with the growth set for agriculture. In engineering, priority is given to equipment for the extractive, forest-based, agro-food, transport, telecommunications and electronics industries. Generally, however, the rule is to keep capital goods imports to a minimum for the time being and to concentrate on those that are essential to the maintenance or expansion of production for export.

YUGOSLAV FOREIGN TRADE, 1979-1983
(in millions of current U.S. dollars)

	1980	1981	1982	1983	1984
Exports	8,978	10,205	9,923	9,914	11,140
Imports	15,064	14,528	12,748	12,154	12,979
Turnover	24,042	24,733	22,671	22,068	24,119
Balance	-6,086	-4,323	-2,825	-2,241	-1,839

Main Yugoslav Imports: Machinery and transport equipment, fuels and lubricants, manufactured goods, chemicals

Main Yugoslav Exports: Machinery and transport equipment, manufactured goods, chemicals

PRINCIPAL SUPPLIERS

	1981		1982		1983	
	US\$ M	%	US\$ M	%	US\$ M	%
Austria	554.4	3.5	513.0	3.8	428.5	3.5
Czechoslovakia	655.7	4.2	595.6	4.5	682.4	5.6
Federal Republic of Germany	2,442.9	15.5	1,857.7	13.9	1,624.0	13.4
France	728.7	4.6	572.1	4.3	410.1	3.4
Italy	1,290.9	8.2	1,022.8	7.7	979.6	8.1
Iraq	388.7	2.5	344.9	2.5	706.8	5.8
Libya	299.5	1.9	409.4	3.1	316.8	2.6
Soviet Union	2,966.1	18.8	2,736.7	20.5	2,463.0	20.3
United Kingdom	452.6	2.8	457.4	3.4	247.1	2.0
United States	957.6	6.1	846.0	6.3	775.0	6.3
Canada	64.1	0.4	57.2	0.4	39.1	0.3

PRINCIPAL MARKETS

	1981		1982		1983	
	US\$ M	%	US\$ M	%	US\$ M	%
Czechoslovakia	547.2	5.0	626.0	6.1	647.2	6.5
Federal Republic of Germany	793.2	7.9	720.0	7.0	807.3	8.1
France	254.4	2.3	229.2	2.2	272.4	2.7
Iraq	579.3	5.3	719.5	7.0	444.8	4.5
Italy	1,012.3	9.2	781.4	7.6	806.1	8.1
Poland	282.6	2.6	223.5	2.2	308.5	3.1
Soviet Union	3,643.1	33.3	3,423.7	33.4	2,699.1	27.2
United States	387.0	3.5	311.0	3.0	346.1	3.5
Canada	24.6	0.2	19.2	0.2	23.2	0.2

III. DOING BUSINESS IN YUGOSLAVIA

Opportunities for Canadian Business

While Yugoslavia is officially recognized as a "developing country" this definition can be misleading. The northwest regions are quite industrialized, and enjoy a relatively high standard of living while the other regions have attained varying levels of industrialization. There are some pockets of poverty in areas of peasant agriculture, especially in the Kosovo region, and the southern part of the Republic of Serbia. Yugoslavia has acquired impressive engineering capabilities, which are used very effectively in construction projects abroad. The country also has large mineral and forestry resources, with one of the biggest copper, lead and zinc industries in Europe.

Yugoslavia offers opportunities for Canadian suppliers of industrial know-how, equipment and some related services. Canada's presence in the Yugoslav market grew respectably between 1979 and 1981, with Canadian exports increasing by more than 50 percent during that period. Canadian companies have been successful at selling aircraft, (the Dash-7 and CL-215 Water Bombers), mining trucks and various specialized machinery, as well as raw materials such as asbestos, wood pulp, coal, and iron ore. Lately, Yugoslavia's shortage of hard currency and severe restrictions on imports have dimmed short-term Canadian sales prospects, as seen in the 11 percent decline in Canadian exports between 1981 and 1982, and the 31 percent decline in 1983, a situation not unlike that of a number of traditional suppliers to Yugoslavia. In 1984, however, Canadian exports recovered and grew by some 55 percent over 1983 levels to \$76 million (Can.)

The potential for Canadian exports lies primarily in the fully manufactured goods sector, especially in the design and supply of equipment for the production of energy, pulp and paper, and mineral transformation.

Opportunities also exist in the communications sector, as well as for the supply of specialized measuring equipment, software services and other highly specialized technologies where domestic expertise has not been acquired. Industrial transportation equip-

ment, forestry exploitation machinery and road building equipment also represent potential opportunities.

Canadians, on the other hand, are less likely to compete successfully in engineering services given Yugoslavia's respectable domestic capabilities, with the exception of the pulp and paper sector and gas extraction technology. Canadian consumer goods and small industrial machinery are, with few exceptions, uncompetitive, given Yugoslavia's proximity to Western Europe. Traditional links with Western Europe are strong, transportation costs are low, and most of all, European competitors have shown themselves to be receptive to licensing, industrial and technical co-operation, joint ventures, and other agreement forms favoured by the Yugoslav government. They have also engaged more readily in counter-trade as a means of penetrating the Yugoslav market. Given this competition, Canadian businessmen must study these alternatives closely when approaching the Yugoslav market. Co-operation in third countries offers a special challenge to Canadian firms. After recent success, it seems that there are other select opportunities for Canadian and Yugoslav firms to work together, particularly in developing countries belonging to the non-aligned movement, where Yugoslavia has good connections. Yugoslavia's cheaper manpower, particularly in civil engineering, makes the possibility of teaming up with this country attractive.

CANADIAN EXPORTS TO YUGOSLAVIA
(in millions of Canadian dollars)

	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>
LIVE ANIMALS	0.1	—	0.1	0.1
FOOD, FEED, BEVERAGES AND TOBACCO	<u>0.8</u>	<u>0.4</u>	<u>0.3</u>	<u>0.2</u>
Dairy produce	0.3	0.1	0.2	0.1
Meat, fresh, chilled or frozen	0.4	0.1	0.1	—
CRUDE MATERIALS, INEDIBLE	<u>29.3</u>	<u>11.4</u>	<u>35.1</u>	<u>30.9</u>
Iron ore & concentrates	12.7	3.5	17.2	20.6
Zinc ore & concentrates	—	—	8.7	—
Asbestos	8.5	6.2	5.2	1.2
Pulpwood	7.2	—	2.5	—
Coal	—	—	—	7.3
Non-metallic minerals	—	—	—	1.7

FABRICATED MATERIALS, INEDIBLE	<u>24.2</u>	<u>13.4</u>	<u>6.0</u>	<u>7.3</u>
Wood pulp and similar pulp	16.6	7.8	4.5	6.0
Primary iron and steel	3.7	4.6	0.9	0.6
END PRODUCTS, INEDIBLE	<u>25.9</u>	<u>46.3</u>	<u>7.4</u>	<u>37.2</u>
Electronic equipment components	—	0.4	1.9	0.9
Telecommunications equipment	1.8	0.9	1.8	2.2
Motor vehicle parts	1.3	1.7	0.6	15.2
Office machines & equipment	0.5	0.3	0.6	—
Aircraft, parts & assemblies	—	—	—	16.6
Laboratory equipment	—	—	—	0.5
TOTAL EXPORTS	<u>80.2</u>	<u>71.5</u>	<u>48.9</u>	<u>75.9</u>

Source: Statistics Canada

CANADIAN IMPORTS FROM YUGOSLAVIA
(in millions of Canadian dollars)

	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>
LIVE ANIMALS	—	—	—	—
FOOD, FEED, BEVERAGES AND TOBACCO	<u>3.1</u>	<u>3.2</u>	<u>3.8</u>	<u>4.5</u>
Fish	0.7	0.5	0.8	0.7
Fruit juices & concentrates	0.4	0.6	0.8	0.5
Other beverages (wine)	0.8	0.8	0.7	0.7(0.3)
Fruits & products, canned & preserved, jams	0.1	0.1	0.3	1.1
Chocolate, candy, gum	—	—	—	0.6
Spices	—	—	—	0.1
CRUDE MATERIALS, INEDIBLE	<u>0.1</u>	<u>—</u>	<u>—</u>	<u>0.1</u>
FABRICATED MATERIALS, INEDIBLE	<u>12.4</u>	<u>7.2</u>	<u>8.5</u>	<u>14.1</u>
Leather & leather fabricated goods	7.4	5.1	4.3	—
Ferrochrome	—	—	1.4	1.4

Organic chemicals	0.6	0.7	0.7	0.7
Pipes, tubing & fittings	—	—	0.9	2.1
Heterocyclic compounds	—	—	—	1.3
Nitrogen fertilizers	—	—	—	1.8
Aluminum sheet	—	—	—	0.7
END PRODUCTS, INEDIBLE	<u>14.7</u>	<u>13.0</u>	<u>15.9</u>	<u>18.9</u>
Furniture & fixtures	5.0	3.1	4.9	6.0
Kitchen utensils, cutlery, tablewear	1.7	1.9	2.6	2.6
Air conditioning & refrigeration equipment	1.4	2.0	0.6	1.2
Outerwear, except knitted	0.3	0.9	0.8	—
Truck, bus & car tires	n/a	0.2	0.6	0.8
Skis	0.4	0.7	0.7	0.6
Non-reusable packing	—	—	0.5	0.5
Apparel	—	—	—	1.3
Footwear	—	—	—	1.4
Metalworking machinery, tools & drills	—	—	—	1.1
SPECIAL TRANSACTIONS, TRADE	<u>0.6</u>	<u>0.7</u>	<u>0.7</u>	<u>1.0</u>
TOTAL IMPORTS	<u>30.9</u>	<u>24.0</u>	<u>29.0</u>	<u>38.6</u>

The Yugoslav Foreign Trade System

Yugoslav firms may, with authorization, import on their own account. At present, more than 1,000 Yugoslav enterprises are legally entitled to engage in foreign trade, while others that do not yet enjoy these rights may still import directly from abroad through a Yugoslav import firm. Whenever practical however, it is best to deal directly with end-users, or appoint a Yugoslav agent to act on your behalf.

Chambers of Economy

Every enterprise in Yugoslavia is a member of the Chamber of the Economy of the republic or autonomous province in which it is situated. In addition, each of these Chambers belongs to the Federal Chamber of the Economy. Responsibilities of the Chambers include examining proposed economic

legislation before it is sent to the federal, republican or provincial assemblies, collecting and analyzing plans of enterprises, preparing estimates of markets (particularly foreign), undertaking research into new products and providing a general economic service for their members.

A co-ordinating committee within the Federal Chamber of the Economy promotes economic and trade relations with foreign countries. To assist in this promotion, the chamber has representatives in most major foreign countries. Although the Federal Chamber does not have a representative in Canada at present, information about doing business in Yugoslavia can be obtained from the Yugoslav Embassy in Ottawa and Consulates General in Toronto and Vancouver.

There are also various bodies concerned with foreign trade in the republics and autonomous provinces (SIZs). These organizations, which represent enterprises and banks involved in foreign trade, were formed primarily to promote the optimal allocation of foreign exchange between importing and exporting firms, but also guide them in their foreign trade activities.

Agents

While there is no legal obligation to have a local agent, appointing one should be considered when it is impractical to establish direct contact with the user because of the nature of the product, or if one wishes to sell on an ongoing basis in this market. If an agent is used, it must be a properly constituted Yugoslav enterprise duly registered and licensed to engage in foreign trade, since individuals are forbidden to act as agents. Such enterprises include trading companies, which specialize to some extent in particular areas; agency enterprises that represent foreign firms; manufacturers which import goods for their own requirements and export their own products; business associations that import and export on behalf of their members; and finally, enterprises which combine some of the above activities.

The choice of an agent should be made with the greatest of care. Experience shows that factors such as changes in regulations, poor initial sales, or even the loss of a key person are enough to discourage the agent's marketing effort. An appointment for a trial period of one year, the minimum term for a representative agreement, is recommended, to be confirmed if

performance is satisfactory. Once an agent firm is chosen, it is important to support it by providing technical literature and by visiting Yugoslavia regularly. As regulations permit a foreign firm to have only one representative in Yugoslavia, it is vital to select an enterprise which is well established and highly experienced throughout the country. Agents are permitted to represent principals only, not trading houses.

Banking and Local Finance

The position of the National Bank of Yugoslavia (Narodna Banka Jugoslavije) is similar to that of central banks in market economies. It regulates the money supply through the issue of bank notes, grants credits to other banks and the government, handles foreign exchange reserves, supervises credits and other banking operations, etc. The National Bank is directly responsible to the Federal Assembly. Separate 'national' banks have been established in each of the six republics and two provinces. Their governors constitute the Board of Governors of the National Bank of Yugoslavia.

Under the current decentralized system, banks function as independent profit-making entities, funded and directed by business enterprises. At the enterprise level there are 'internal' banks which provide simple banking services only to the enterprise. These banks in turn form 'basic' banks, which have the resources and expertise to provide a higher level of domestic general credit and investment services. 'United' banks result from the association, usually on a regional basis, of a number of basic banks. If they fulfill certain conditions requiring foreign exchange funds and technical competence, they may be authorized to engage in foreign exchange transactions.

Several Yugoslav banks have representatives in a number of foreign countries. Two Yugoslav commercial banks, Jugobanka of Belgrade and Stopanska Banka of Skopje, maintain representative offices in Toronto. Other Yugoslav banks have more than 800 correspondents in some 100 countries. No Canadian banks maintain resident representatives in Yugoslavia.

Exchange Controls

The Yugoslav dinar is an inconvertible currency subject to considerable regulation, despite progress

towards convertibility in recent years. The state still sets the exchange rate, and has been regularly devaluing the dinar against a basket of Western currencies in order to improve export performance.

The right to trade in foreign currencies is limited to authorized domestic banks. For certain types of documented international obligations, Yugoslav enterprises are entitled to buy foreign currency with dinars, but the scope of these transactions is limited.

Import Regulations

Yugoslavia maintains a complicated, and frequently changing, system of import controls and assessment of customs duties. All imports are classified, according to their priority, into four categories: free imports, imports limited by foreign exchange availability, imports limited by volume quotas, and imports for which special licenses must be secured.

The importing enterprise must ensure that the following conditions are satisfied before it is able to proceed with the import:

- the Yugoslav importer must check with the Federal Chamber of the Economy to ascertain if the same or a similar product is available from domestic sources;
- the republican committee responsible for foreign exchange must certify that the import meets the priorities of the republic and the hard currency is available; and
- the Federal Social Accounting Service must review the sales contract to ensure, if appropriate, that a counter trade, buy-back or offset arrangement has been included.

The Yugoslav Customs Tariff employs the Brussels Nomenclature, a one-column schedule of ad-valorem duties. These are applicable to the Cost, Insurance, Freight (CIF) value of goods imported from countries such as Canada, that extend to Yugoslavia the status of Most Favoured Nation (MFN).

Two taxes are also imposed on the dutiable value of imports: a 1 percent customs evidence tax, and a 6 percent equalization surcharge, the latter to generate funds for less developed regions.

Industrial Co-operation and Investment Possibilities

A persisting scarcity of hard currency and the complex system of foreign trade regulations have led Yugoslav enterprises to seek novel forms of doing business with foreign firms. The general aim is to reduce the net foreign exchange outlay in a given transaction. Joint ventures and co-operation agreements, as well as licensing and various types of countertrade, especially compensation, are often proposed to foreign businessmen. Joint marketing of complementary products, joint design and engineering, exchange of industrial property rights, and joint activities on third markets, are other forms of co-operation favoured by Yugoslav companies, and should be seriously examined as potentially effective means of penetrating the Yugoslav market.

Since 1967, Yugoslavia has welcomed foreign equity investment to stimulate the industrial and technological development of the economy, and to promote export performance. The most common, long-term business arrangements with foreign firms, apart from joint ventures, are joint production agreements. These forms of industrial co-operation have attracted some \$10 billion (US) to the Yugoslav economy from Western sources. The Canadian Embassy can render considerable assistance in finding possible Yugoslav partners, and in recommending local experts on pertinent Yugoslav foreign legislation.

In 1968, the Yugoslav government created the International Investment Corporation of Yugoslavia, to encourage the formation of joint ventures. Based in Zagreb, the Corporation maintains offices abroad, in London and Cologne. It can provide a great deal of information on the conditions and opportunities for investment in Yugoslavia.

Co-operation on Capital Projects in Third Countries

Yugoslavia has developed very broad industrial and engineering capabilities. These have been used competitively in construction projects abroad, particularly in the developing countries. Yugoslav enterprises are often received more warmly in the Third World as a result of their country's prominence in the "non-aligned" movement.

The rapidly expanding activities of Yugoslav companies abroad can provide opportunities for Canadian firms which offer special expertise and equipment not readily available in Yugoslavia. Areas of possible co-operation include airport facilities, metallurgy and mining, hospitals, communications, and food processing and storage facilities. Co-operation can take the form of sub-contracts for equipment or services (or both) and exchanges of specialized technology. Canadian participation in such projects may well qualify for Export Development Corporation (EDC) financing. Such co-operation may also permit a Canadian company to expand the scope of its activities in Yugoslavia proper, or enter into new markets in third countries, often at less risk and cost.

Of course, co-operative ventures of this type must be carefully studied, since they often are based on an existing close relationship with a Yugoslav firm. In particular, the partner's potential and reliability must be evaluated.

Taxation

Yugoslav taxation laws have been changing rapidly in recent years, and they vary from republic to republic. It is best to consult local attorneys for details on tax legislation.

Government Procurement

Except in defence procurement, Yugoslavia has no government purchasing agencies. Government purchases are channelled through foreign trade enterprises specializing in items which interest the government. Public tenders are published in *Sluzbeni List SFRJ*, the official Yugoslav gazette. Often, the interested government agency also extends invitations to bid to known foreign suppliers.

Canadian Export Controls

Canada restricts the export of certain products to Yugoslavia. More information on these restrictions can be obtained from:

Export Controls Division (ESE)
Department of External Affairs
Lester B. Pearson Building
125 Sussex Drive
Ottawa, Ontario
K1A 0G2
Tel.: (613) 996-2387
Telex: 053-3745

IV. YOUR BUSINESS VISIT TO YUGOSLAVIA

Services of the Canadian Embassy

The Commercial Division of the Canadian Embassy in Belgrade functions primarily as a liaison between Canadian firms and local business enterprises, and offers a wide variety of services. The Canadian Trade Commissioner is a valuable contact: his concern is to identify business opportunities for Canadian firms. He is also able to help the marketing effort by introducing and guiding buyers and sellers, and by providing recommendations and advice on a variety of commercial matters.

The Trade Commissioner should be advised well before a business trip to Yugoslavia. Ample advance notice will allow him to provide appropriate assistance to the visiting businessman. The extent to which the Canadian company can be helped by the trade office depends largely on the information provided by the company.

Business Calls

The best introduction to the Yugoslav business community is through personal visits, which also provide an opportunity to study the market firsthand. Yugoslav business methods and customs differ somewhat from those in Canada. For example, business hours are quite different: firms open their doors at 07:00, work non-stop until 14:30, then shut down for the rest of the day. Business visitors to Yugoslav firms will be greeted warmly, with Turkish coffee, fruit juices or plum brandy (Sljivovica), which should be accepted lest one be deemed impolite. Invitations reciprocating Yugoslav hospitality extended earlier are very much appreciated.

The "businessman's lunch," which begins at 14:00 or so, can last throughout the afternoon and is very much part of the process of "getting to know you." The excessive amount of time devoted by Yugoslav officials to initial pleasantries should not be seen as

a frivolous approach to business, but quite the opposite: these are preludes to serious discussions. The apparent lack of protocol is deceptive, for contacts are normally between people of comparable standing. Initial meetings are considered sufficiently important to merit the participation of numerous members of the enterprise management, who provide specialized assistance to the senior official. First impressions being important, the Canadian businessman should be very punctual and demonstrate, in spirit at least, if not in numbers, an equal degree of interest and expertise.

Presentation

Canadian businessmen should make a complete presentation to the prospective clients in the initial stages of contact. This session should include literature, specifications, samples and prices, delivery and the quality control information required for a thorough evaluation of the Canadian firm and its product or service. An adequate supply of business cards should be on hand at all times.

Follow-up

Appropriate follow-up can be crucial to the success of a business visit. Thank-you notes as well as samples, brochures and requested information should be quickly dispatched upon return to Canada. A follow-up visit should be planned in the event there is business potential.

Trade Fairs

Yugoslavia hosts a number of national and international exhibitions each year. The largest and best known is the Zagreb International Fair, held each fall. There are also smaller specialized fairs in cities throughout the country which often attract the participation of both East and West European enterprises.

Price Quotations and Terms of Payment

Prices should be quoted both Free on Board (FOB) and Cost, Insurance, Freight (CIF) Yugoslav port of entry, either in Canadian or U.S. dollars.

The payment performance of most established Yugoslav enterprises is good, although it is very dif-

difficult to obtain concrete information on their credit-worthiness. For non-capital imports, payment is normally by irrevocable letter of credit. A 30 to 90-day credit period on consignment stocks is usual. The sale of capital goods generally requires medium to long-term credits. Thus, Canadian sellers should familiarize themselves with the services of the EDC in Ottawa.

“Business Reports” on Yugoslav firms can be obtained within approximately two months from the Yugoslav Federal Chamber of the Economy. The information they provide is quite general, and typically state that the subject firm is well-known and reputable. Credit reports from Yugoslav commercial banks on their clients tend to be of the same nature. Confidential information of the type published in the West by various specialized agencies, such as Dun and Bradstreet, is not available.

Advertising and Promotion

Advertising in Yugoslavia is usually relevant to goods produced under licence. There are a number of local advertising agencies, yet it is possible to bypass them by using the local media directly, taking national tastes into consideration. Advertising patterns are very similar to those used in other Western countries. Free samples are also quite effective.

Protection of Property: Patents and Trade Marks

Yugoslavia is a member of the Paris Union for the Protection of Industrial Property, and of the Madrid Convention for the International Registration of Trade Marks.

Applications for patents by the inventor or his assignee should be made within a reasonable amount of time after the initial public exposure of the invention. Patents are granted for a period of seven years, and can be renewed for an additional seven years. Compulsory licences may be granted in cases where patented inventions are not used within three years of the date of the registration of the patent. The owner of the patent, however, is then entitled to compensation.

Trade marks can be registered indefinitely, although they can be contested for up to three years after their

initial registration. Renewal fees are usually paid on a ten-year basis.

Shipping Information

Documentation

Standard shipping invoices containing FOB or CIF prices normally fulfill all customs requirements. Certification of origin and sanitary certificates are required only for a small number of imports. Details can be obtained from the Yugoslav Embassy in Ottawa or the Consulate in Toronto, as well as from the Canadian Embassy in Belgrade.

Samples and Advertising Material

Although samples without commercial value can theoretically be imported duty-free as accompanying baggage, this is at the discretion of customs officers at the port of entry. It is therefore advisable to obtain an ATA carnet from the Department of External Affairs if a large amount of samples is involved, or if they appear to have a commercial value. Samples can also be shipped duty-free into Yugoslavia, provided they are addressed to a Yugoslav enterprise with the indication that they are samples and showing the unit price. Advertising materials are subject to duties of 18 to 30 percent, but these can be avoided by presenting the ATA carnet duly certified by the Department of External Affairs in Ottawa.

Labelling, Marking and Packing

No special regulations exist for the labelling and marking of general merchandise and packages, and packing conforms to international practice. Exceptionally, special instructions will be provided by the Yugoslav importer.

Shipping Services from Canada to Yugoslavia

Air cargo shipments can be routed almost daily via London, Amsterdam, Zurich or Frankfurt and twice weekly direct via Yugoslav airlines.

Sailings between Yugoslavia and Canada are regularly scheduled and frequent. Yugoslav merchant ships sail the St. Lawrence Seaway and service both Canadian

coasts. Sailings are either direct to the Yugoslav port of Rijeka or via West European ports. Container facilities are available in Rijeka. Special attention should be given to any specific shipping instructions.

General Information

Climate

The Yugoslav climate varies considerably with location and altitude. The Adriatic coastline is blessed with a mild Mediterranean climate, making it the nation's most favoured resort area. Elsewhere, the country enjoys hot but not excessively humid summers, and relatively cold winters. High mountain regions, ideal for winter sports, have an Alpine climate.

Dress

Seasonal clothing worn in Canada is appropriate for the Yugoslav climate. Standard business suits are proper dress.

Holidays

The following seven official holidays are celebrated throughout the country. On these days, all business affairs are suspended:

New Year's Day — January 1 and 2

Labour Day — May 1 and 2

Veterans' Day — July 4

Republic Day — November 29 and 30

Each republic and autonomous province also observes its own National Uprising Day, although business continues as usual in other parts of the country:

Serbia — July 7

Montenegro — July 13

Slovenia — July 22

Bosnia and Herzegovina — July 27

Croatia — July 27

Macedonian National Holiday — August 2

Macedonian People's Uprising Day — October 11

The Canadian Embassy observes eleven statutory holidays annually. These represent a mixture of Canadian and local holidays, and vary from year to year.

Measures

Yugoslavia uses the metric system.

Electricity

Electricity for domestic uses is supplied at 220 volts, 50 cycles AC; for industrial uses, at 380 volts, 50 cycles AC. Round, two-prong, West European-type plugs are used.

Post, Telex, Telephone

Air mail from Canada to Yugoslavia usually takes from 10 to 14 days. Surface mail takes considerably longer, and therefore Canadian firms are advised to dispatch all mail by air. Telegram and Telex facilities, as well as a 24-hour international telephone service are available and efficient.

Business Hours

With the exception of shops and markets, Yugoslavia works on a five-day week. Commercial offices are open from 07:00 to 14:30, with no break for lunch. Government offices work from 08:00 to 16:00, Monday to Friday, but from 08:00 to 17:00 on Wednesday. Banking hours are from 07:30 to 19:00. Most shops are open from 08:00 to 20:00 (some still close between 12:00 and 17:00, and open again from 17:00 to 20:00). The Commercial Division of the Canadian Embassy is open to the public from 08:00 to 16:00, Monday to Thursday, and from 08:00 to 13:00 on Friday.

Yugoslavia is six hours ahead of Eastern Standard Time.

Travelling to Yugoslavia

There are now scheduled flights between Canada and Yugoslavia; in addition, Yugotours of Toronto arranges tourist charters from Toronto and Montreal. Yugoslavia is also easily accessible from New York and the major European capitals.

The following airlines serve Belgrade:

- Aeroflot
- Air Algeria
- Air France
- Alia (Royal Jordanian Airlines)

Alitalia
Austrian Airlines
Balkan Airlines
CAAC (China Airlines)
InterFlug
Iraqi Airways
JAT (Yugoslav Airlines)
KLM (Royal Dutch Airlines)
Libyan Arab Airlines
LOT (Polish Airlines)
Lufthansa
Malev (Hungarian Airlines)
Pan Am (Pan American Airlines)
Qantas Airways
Sabena Belgian World Airlines
SAS (Scandinavian Airlines)
Swissair
Tarom (Romanian Air Transport)

The airport tax is 60 dinars on departure for domestic flights and 200 dinars for international flights, payable at the check-in counter.

Passports and Visas

Canadian citizens require both a valid passport and a Yugoslav visa. While it is preferable to obtain a visa prior to departure from Canada, visas can be obtained at customs points, including airports, upon arrival in Yugoslavia. The visa is valid for stays of up to three months. More information may be obtained from:

Embassy of the Socialist Federal Republic of Yugoslavia

17 Blackburn Avenue
Ottawa, Ontario
K1N 8A2
Tel.: (613) 233-6289

Yugoslav Consular Office

377 Spadina Road
Toronto, Ontario
M5P 2V7
Tel.: (416) 481-7279

Yugoslav Consular Office

1237 Burrard Street
Vancouver, British Columbia
Tel: (604) 685-8391.

Vaccination certificates are not always required, but should be kept handy.

When to Go

For business purposes, it is best to avoid Yugoslavia in July and August. At that time of year, most enterprises are operating with only a skeleton staff.

The following personal effects of visitors are exempt from duties, on condition they are re-exported:

- personal jewelry, two cameras and five rolls of film, one movie camera (16mm) and two rolls of film, one pair of binoculars, one portable record player and ten records, one portable radio receiver, one portable tape recorder, one portable TV set (up to 48 cm screen size), one portable typewriter, one pocket electronic calculator, one set of sports equipment;
- one litre of liquor, 200 cigarettes, 50 cigars and 250 g of tobacco; and
- a rifle with 50 rounds if the traveller possesses a permit issued by diplomatic or consular representatives of the SFRJ or the Secretariat of Internal Affairs.

Currency

The unit of currency is the dinar. In mid-June 1986 the official exchange rate was approximately 265 dinars to the Canadian dollar. Any amount of foreign currency may be imported and re-exported, but no more than 1,500 dinars may be taken into or out of Yugoslavia. At the end of a trip, remaining dinars may only be exchanged for convertible currency at border crossing points, upon presentation of currency exchange slip(s), or at airports, by presenting a plane ticket for a foreign destination together with exchange slip(s). Dinars cannot be exchanged for convertible currency at other locations.

Local Transport

There are virtually no travel restrictions inside Yugoslavia. Transportation in major towns presents no difficulties, as taxis are plentiful. Internal flights to the various republican capitals are frequent. Rail services are good, and automobiles are usually rented easily. A number of small industrial and mining centres are conveniently accessible only by car, and reaching them may require up to one half-day of travel.

Hotels

Yugoslav hotels are quite reasonable. Advanced reservations are recommended because of frequent special events. The following hotels are recommended:

- Belgrade: Hotel Metropol (Telex: 11346)
Hotel Jugoslavija (Telex: 11345)
Hotel Moskva (Telex: 11505)
Hotel Intercontinental (Telex: 12009)
- Zagreb: Hotel Esplanada (Telex: 21395)
Hotel Zagreb-Intercontinental (Telex: 21742)
Hotel Palace (Telex: 21526)
- Ljubljana: Hotel Lev (Telex: 31350)
Hotel Slon (Telex: 31254)
Holiday Inn (Telex: 31622)
- Sarajevo: Hotel Bristol (Telex: 41342)
Hotel Europa (Telex: 41219)
Holiday Inn (Telex: 41886)
- Skopje: Hotel Panorama (Telex: 51318)
Hotel Kontinental (Telex: 51318)

Note: Foreign visitors are required to register with the police upon arrival, and to notify them of any subsequent changes of address. This is done automatically for registered guests by the hotels, who will ask for the visitor's passport on arrival. It will be returned within a few hours, or by the next morning at the latest.

Restaurants

Dining is a pleasure in Yugoslavia. Ethnic and cultural diversity has inspired a rich and varied cuisine, which is best sampled when accompanied by fine domestic wines and brandies.

Credit Cards

Major Canadian credit cards, such as Visa, MasterCard and American Express, are accepted in tourist areas.

V. SUGGESTED READING MATERIAL AND SOURCES OF BUSINESS INFORMATION

L. D'Andrea-Tyson and G. Eichler, "Continuity and Change in the Yugoslav Economy in the 1970s and 1980s," in *East European Economic Assessment, A Compendium of Papers Submitted to the Joint Economic Committee of the Congress of the United States*, Washington, D.C.: United States Government Printing Office, 1981.

V. Dubey, *Yugoslavia: Development with Decentralization*, Johns Hopkins University Press, 1975.

F. Singleton and B. Carter, *The Economy of Yugoslavia*, London: Croon Helm, 1982.

Business Eastern Europe, Geneva: Business International, published weekly.

Doing Business in Eastern Europe, Geneva: Business International, updated periodically.

East European Markets, London: Financial Times Business Information Limited, published every other week.

OECD Economic Surveys: Yugoslavia, Paris: Organization for Economic Co-operation and Development, July 1982. (These surveys are published annually).

Quarterly Economic Review of Yugoslavia, London: The Economist Intelligence Unit. (Published quarterly, with annual supplement).

Yugoslavia Export, Belgrade: Yugoslav Publication, published monthly.

VI. FEDERAL EXPORT ASSISTANCE

Market Advisory Services

As a service to Canadian business, the federal government maintains Trade Commissioners in 67 countries around the world. These representatives provide assistance to Canadian exporters and assist foreign buyers in locating Canadian sources of supply. In addition to serving as a link between buyer and seller, the Trade Commissioner advises Canadian exporters on all phases of marketing, including the identification of export opportunities, assessment of market competition, introduction to foreign businessmen and government officials, screening and recommending agents, guidance on terms of payment and assistance with tariff or access problems. Trade Commissioners also play an active role in looking for suitable markets and encouraging promotional efforts.

An additional source of information is the USSR and Eastern Europe Trade Development Division (RBT) at the Department of External Affairs in Ottawa. Trade Commissioners in Belgrade are in constant contact with their counterparts in this Division. For more information, please write to:

USSR and Eastern Europe

Trade Development Division (RBT)

Department of External Affairs

Ottawa, Ontario

K1A 0H5

Telephone: (613) 993-4884

Telex: 053-3745.

This office can provide:

- general market information, on Yugoslavia as well as an assessment of the market for particular products;
- information on Yugoslav tariff rates, regulations, licensing, non-tariff barriers, product standards, required documents, etc.; and
- publications, including other Guides for Canadian Exporters, and country briefs on smaller markets.

The Division is also responsible for assisting and advising exporters on marketing their products and services, informing businessmen about export services provided by the Canadian government and export opportunities as they arise.

If your company requires assistance in identifying overseas markets for your products, contact your nearest Regional Office of the Department of Regional Industrial Expansion (DRIE). Their addresses are listed in Section VII below. These offices, located in each province, assist exporters with market planning and can arrange for consultations with both the Division in Ottawa and the Trade Commissioners in Belgrade.

Export Development Corporation

The Export Development Corporation (EDC) is a Canadian Crown Corporation whose purpose is to facilitate and develop Canada's export trade.

The EDC provides insurance, guarantees and export financing, financial advice and financial packages to facilitate the sale of Canadian goods and services by increasing their competitiveness on world markets.

The Corporation offers the following services:

Export Insurance and Related Guarantees

- global comprehensive insurance
- global political insurance
- selective political insurance
- specific transaction insurance
- specific transaction guarantees
- loan pre-disbursement insurance
- foreign investment insurance
- performance security insurance
- performance security guarantees
- consortium insurance
- surety bond insurance
- bid security guarantees

Export Financing and Related Guarantees

- loans
- multiple disbursement agreements
- line of credit allocations
- note purchases
- forfeiting
- loan guarantees

The EDC head office is in Ottawa. It may be reached at the following address:

Export Development Corporation

P.O. Box 655
151 O'Connor Street
Ottawa, Ontario
K1P 5T9
Tel.: (613) 598-2500
Telex: 053-4136

Regional offices are maintained in Montreal, Toronto, Vancouver and Halifax. General enquiries and export insurance services are handled there. Enquiries about export financing for a specific geographical area should be addressed to the manager of the appropriate department in the Export Financing Group, Ottawa.

Program for Export Market Development

The Program for Export Market Development (PEMD) is designed to assist individual firms in their particular marketing endeavours. Financial assistance is available to companies who apply for it. The government contribution is repayable to the extent that the PEMD-supported activity generates export sales. The following export activities qualify for PEMD funding:

- pre-contractual and bidding costs for specific capital projects (PEMD A);
- travel and related costs in market identification and market adjustment (PEMD B);
- costs of individual participation in foreign trade fairs (PEMD C);
- specified cost of bringing foreign buyers to Canada (PEMD D);
- costs associated with forming and operating an export consortium (PEMD E);
- costs associated with sustained market development (PEMD F); and
- support for export market development of agriculture, food, and fisheries products (PEMD FOOD).

Applications should be submitted to the DRIE regional office in the province where the applicant firm is registered.

Trade Fairs and Missions

To assist Canadian exporters in developing business in foreign markets, the Trade Fairs and Missions —

Europe, Trade Development Division organizes and implements the following trade promotion programs:

- participation in trade fairs abroad;
- trade missions to and from Canada; and
- in-store promotions and point-of-sale displays.

The yearly Fairs and Missions Program for the region is put together on the basis of suggestions by the Trade Commissioners in Belgrade and the USSR and Eastern Europe Trade Development Division in Ottawa in discussion with the industry sector specialists of DRIE.

For more information write to:

Deputy Director

Trade Fairs and Missions — Europe
Trade Development Division (RCTF)
Department of External Affairs
Ottawa, Ontario K1A 0H5
Tel: (613) 996-5554
Telex: 053-3745

VII. USEFUL ADDRESSES

Canadian Offices

In Yugoslavia

Commercial Division

Canadian Embassy

Kneza Milosa 75

11000 Belgrade

Tel.: 644-666

Telex: 11137 DOMCA YU

Cable Address: DOMCAN BELGRADE

In Canada

USSR and Eastern Europe

Trade Development Division (RBT)

Department of External Affairs

Lester B. Pearson Building

125 Sussex Drive

Ottawa, Ontario

K1A 0G2

Tel.: (613) 993-4884

Telex: 053-3745

Trade Fairs and Missions Division (RCTF)

Department of External Affairs

Lester B. Pearson Building

125 Sussex Drive

Ottawa, Ontario

K1A 0G2

Tel.: (613) 995-5554

Telex: 053-3745

Canada-Yugoslavia Economic Committee

Canadian East European Trade Council

200 Elgin Street

Ottawa, Ontario

K2P 2J7

Tel.: (613) 238-4000

Telex: 053-3051 CANCHAM OTT

Yugoslav Offices in Canada

Embassy of the Socialist Federal Republic of Yugoslavia

17 Blackburn Avenue

Ottawa, Ontario

K1N 8A2

Tel.: (613) 233-6289

Telex: 053-4203 (EMBYUGOSL OTT)

Consulate General of the Socialist Federal Republic of Yugoslavia

377 Spadina Road

Toronto, Ontario

M5P 2V7

Tel.: (416) 481-7279

Telex: 06-22941 (CONGRLYU TOR)

Consulate General of the Socialist Federal Republic of Yugoslavia

1237 Burrard Street

P.O. Box 48359

Vancouver, British Columbia

V7X 1A1

Tel.: (604) 685-8391

Telex: 04-508670 (YUGOCON VCR)

Mr. Kalman S. Samuels, Q.C.

Honorary Consul of the Socialist Federal Republic of Yugoslavia

1 Place Ville Marie, Suite 3424

Montreal, Quebec

H3B 3N6

Tel.: (514) 866-3624

Export Development Corporation

Head Office

Export Development Corporation

110 O'Connor Street

Ottawa, Ontario

Mailing Address:

P.O. Box 655

Ottawa, Ontario

K1P 5T9

Tel.: (613) 237-2570

Cable: EXCREDCORP

Telex: 053-4146

Facsimile: (613) 237-2690

Vancouver

Export Development Corporation

Suite 1030

One Bentall Centre

505 Burrard Street

Vancouver, British Columbia

V7X 1M5

Tel.: (604) 688-8658

Telex: 04-54223

Facsimile: (604) 688-3710

Montreal

Export Development Corporation

Suite 2724

900 Place Victoria

P.O. Box 124

Tour de la Bourse

Montreal, Quebec

H4Z 1C3

Tel.: (514) 878-1881

Telex: 05-25618

Facsimile: (514) 876-2840

Toronto

Export Development Corporation

Suite 810

National Bank Building

P.O. Box 810

150 York Street

Toronto, Ontario

M5H 3S5

Tel.: (416) 364-0135

Telex: 06-22166

Facsimile: (416) 360-8443

Halifax

Export Development Corporation

Suite 1401

Toronto-Dominion Bank Building

1791 Barrington Street

Halifax, Nova Scotia

B3J 3L1

Tel.: (902) 429-0426

Telex: 019-21502

Department of Regional Industrial Expansion

Regional Offices

If you have not previously marketed abroad, contact the nearest Regional Office of the Department of Regional Industrial Expansion in your area.

Alberta and Northwest Territories

The Cornerpoint Building

Suite 505

10179-105th Street

Edmonton, Alberta

T5J 3S3

Tel.: (403) 420-2944

Telex: 037-2762

British Columbia and Yukon

P.O. Box 49178

Bentall Centre, Tower III

Suite 2743

595 Burrard Street

Vancouver, British Columbia

V7X 1K8

Tel.: (604) 666-1434

Telex: 04-51191

Manitoba

785 Carlton Street

4th Floor

Winnipeg, Manitoba

R3C 2V2

Tel.: (204) 949-2381

Telex: 075-7624

New Brunswick

590 Brunswick Street

Fredericton, New Brunswick

E3B 5A6

Tel.: (506) 452-3190

Telex: 014-46140

Newfoundland and Labrador

P.O. Box 8950

90 O'Leary Avenue

St. John's, Newfoundland

A1B 3R9

Tel.: (709) 737-5511

Telex: 016-4749

Nova Scotia

Duke Tower, Suite 1124
5251 Duke Street
Scotia Square
Halifax, Nova Scotia
B3J 1P3
Tel.: (902) 426-7540
Telex: 019-21829

Ontario

P.O. Box 98
One First Canadian Place
Suite 4840
Toronto, Ontario
M5X 1B1
Tel.: (416) 365-3737
Telex: 065-24378

Prince Edward Island

P.O. Box 2289
Dominion Building
97 Queen Street
Charlottetown, Prince Edward Island
C1A 8C1
Tel.: (902) 892-1211
Telex: 014-44129

Quebec

P.O. Box 247
800 Place Victoria
37th Floor
Montreal, Quebec
H4Z 1E8
Tel.: (514) 283-6254
Telex: 012-0280

220 avenue Grande Allée est
Room 820
Québec, Québec
G1R 2J1
Tel.: (418) 694-4726
Telex: 051-3312

Saskatchewan

1955 Smith Street
Room 400
Regina, Saskatchewan
S4P 2N8
Tel.: (306) 359-5020
Telex: 071-2745

Notes

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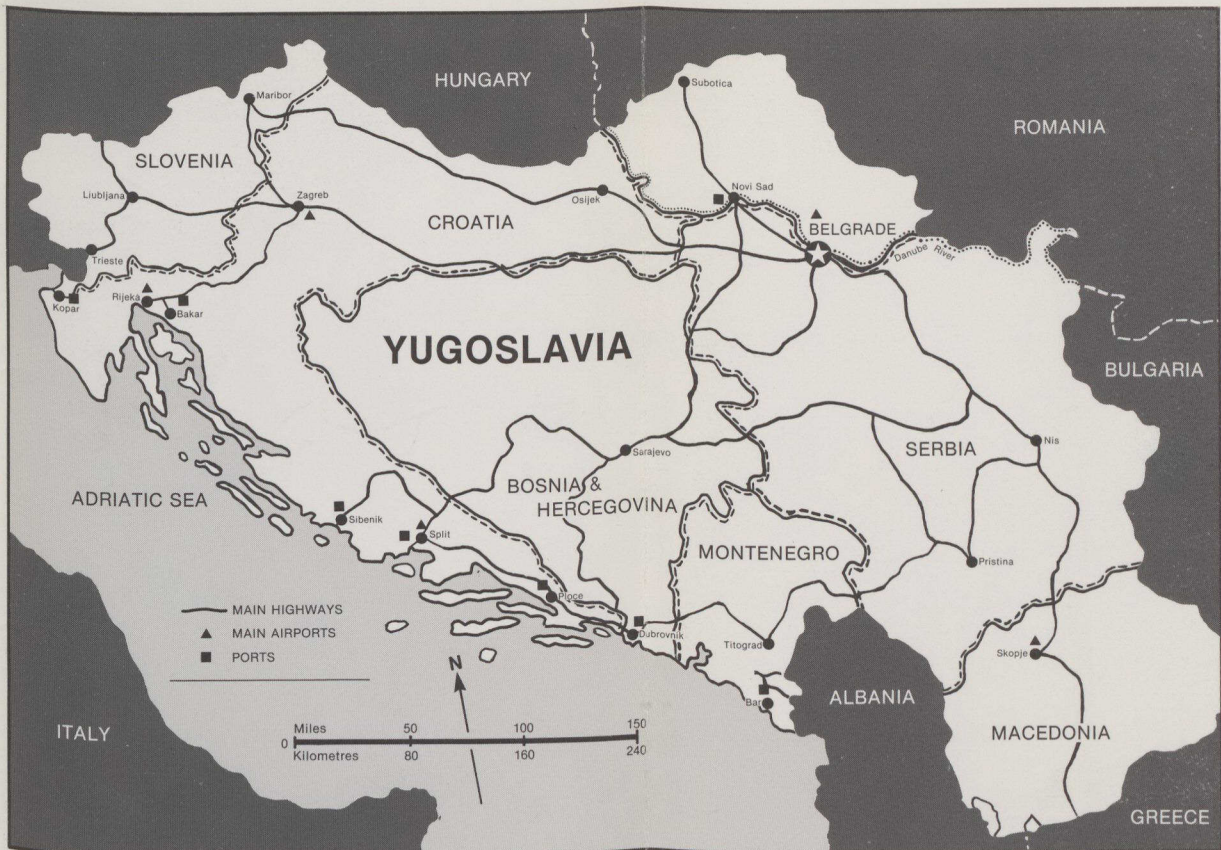
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Storage

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