

Jute Industry in Nepal: A study on Its Production, Productivity and Capacity Utilization

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INTRODUCTION

Nepalese economy is characterised by a large primary sector and a very small secondary sector along with an equally small tertiary sector. Agriculture dominates the economy employing a high proportion of work-force. "Agriculture contributes nearly three - fifths of the country's GDP and three quarters of total export earning with providing employment to about nine - tenths of the country's population" (NPC: 1991:15). No. doubt, agriculture the backbone of the Nepalese economy occupies a place of pride in the field of national income, livelihood, employment, industrial development and international trade. But overcrowding and consequent pressure of population on land have led to sub-division and fragmentation of holdings, decline in the area of land per-capita, disguised unemployment in agriculture and marginal productivity of labour zero or even negative. So it is clear that not much can be achieved unless this continuing pressure of population on land is reduced. Industrialization has to play a vital role in the process of economic development. To make them self sufficient and to label them as an advanced economy of the world there are not any alternations except to quicken the tempo of industrialization in consonance with the development of agricultural sector. Industrialization is a key factor in the development of a country which is generally acknowledged that economic backwardness of the developing nations can only be changed by gradual building up of industrial infrastructure. "A nation moves upward from a rural economy to an efficient one with higher levels of material well-being mainly through industrialization. Industrialization provides employment opportunities, relieves population pressure on land area, raises life standards of the people, develops technological and managerial skills and enables export development and import substitution" (Thapa: 1992).

JUTE INDUSTRY IN NEPAL

In Nepal the history of organized industries has a very recent origin. The contribution of industrial sector to the total economy is very low, despite the fact that expansion of the industrial sector is crucial for increasing employment opportunities.

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generating economic growth and achieving sustainable growth. Jute industry is the oldest and one of the large scale ventures among organized industries. In the beginning of industrial development of Nepal, the development of Jute industry has taken place in Nepal and the origin of the process of industrialization can be traced back to the establishment of first Jute mill namely "Biratnagar Jute Mills" Ltd. in 1936 A.D. in Biratnagar in Morang district of Koshi Zone with an authorised capital of Rupees 5.2 millions under the Company Act, with a view to quicken the tempo of industrial development in the country". The Biratnagar Jute mills ran at profit from the very beginning up to 1951 A.D. because of the second world war, the partition of India and the liberal attitude of the Government in providing the mill with complete exemption from custom duty. By 1951 Biratnagar Jute mills had increased its productive investment from Rs. 4.3 millions to Rs. 13.2 millions. The success achieved by Biratnagar Jute mills as well as continuing boom in the world market for Jute products during the war period led to the establishment of second Jute mill namely "Shree Raghupati Jute Mills" in 1946 in Biratnagar, with an authorised capital of Rs. 15 millions. The location of these Jute mills in Biratnagar is influenced by the fact that it is the most important Jute growing region of the country. Biratnagar Jute mills started to manufacture gunny sacks, hessian and twine in 1937 with 175 looms and 3368 spindles with the capacity of 30 Tons of Jute material per day. Then the mill was equipped with 358 looms and 6368 spindles by 1946. After the modernisation of Jute mill, its productive capacity increased to 40 M/T per day. After the new political setup in 1951, the Jute mill began to show losses but it was quite temporary. From 1953/54 onward, the profit earning trend again successfully achieved.

Shree Raghupati Jute mills started its production only in the year 1954 due to the management problems. During the initial stage, total production capacity of the mills was only 7 Tons per day, which was raised to a level of 18 Tons per day in 1963. Raghupati Jute mills is equipped with 300 looms and 3720 spindles. The mill suffered continuous losses from 1964/65 onward due to shortage of working capital and administrative inefficiency, which resulted in the high cost of production. The accumulated loss as of the end of 1968/69 amounted to Rs. 4.7 millions and in the year 1989/90 and 1990/91 the annual loss amounted to Rs. 3.33 millions and 3.09 millions respectively.

Both mills produce three types of Jute products such as sacking, hessian clothes and twine. Sacking has occupied the highest position in the share of total Jute goods production and hessian and twine occupy the second and third position respectively. The combined annual production of two Jute mills is about 19,800 M/T, in which Biratnagar Jute mills and Raghupati Jute mills share 12,000 M/T and 7,800 M/T respectively. In September 1970 an agreement was reached between HMG/N and ADB to launch a Jute development programme in Nepal and with the establishment of the "Nepal Jute Development Board", jute development programme started in an organized way. This board was replaced by the "Jute Development and Trading corporation" in Oct. 1974. In Private Sector, there are several Jute mills and Jute process located mostly in eastern region of the country in which "Nepal Jute Industry" (Pvt.) Ltd., "Guheswary Jute Mills" (Pvt.) Ltd. and "C.M. Jute Mills" (Pvt.) Ltd. are the Jute mills, which produce Jute products and "Hanuman Industries" (Pvt.) Ltd., "Eastern Nepal Industries" (Pvt.) Ltd., "United Industries" (Pvt.) Ltd. and "Meechi Anchal Jute

Press Udyog" (Pvt.) Ltd, are the Jute presses. Nepal Jute industry and Guheswary Jute mills produce twine only where as C.M. Jute mills produces both hessian & sacking along with twine. The annual production of twine in Nepal Jute industry and Guheswary Jute mills are 2,400 M/T and 1,800 M/T respectively. C.M. Jute Mills produces annually 4,500 M/T of hessian, sacking and twine.

Jute plays a crucial role in the economic activities of Nepal. In terms of production it had been the largest cash crop in Nepal. In the earning of convertible foreign exchange Jute and Jute products contributed nearly 50 Percent in 1979, however, it shares a very small portion, around 2 Percent of the total world jute production compared to Bangladesh and Thailand which share more than 95 Percent of the total Jute market of the world. India, although a major producer of Jute consumes its entire production and it has been a major importer of raw Jute. In 1973/74 exports of Jute and Jute products from Nepal amounted for less than 1.5 Percent of the total world export. The exported amount of Jute and Jute products in the year 1978/79 was Rs. 296.0 million which makes it the nation's leading earner of foreign exchange.

EXPORT OF JUTE AND JUTE PRODUCTS

Though an old export industry, Nepalese Jute industry has had a chequered history, years of prosperity alternating with years of depression. The share of the export of Jute and Jute products in Nepal's total convertible foreign currency earning was 60 to 70 Percent in 1976. Since 1960's, the contribution of Jute and Jute products occupied nearly 80 Percent of the total export. In those days Jute and Jute products had the second largest source of convertible foreign exchange earning after tourism. However at present, Nepalese Jute industry is in low profile. It is facing a number of problems on its smooth and proper development such as the production of Jute and Jute goods, modernisation of plant and machinery, competition from substitutes, marketing, inefficiency of management, high prices etc. Shortage of irrigational facility in the Jute growing areas is one of the major problem. Jute is cultivated mainly in the dry-up land which rely entirely on rainfall. The competition from synthetic substitutes has threatened the position of Jute goods in the world market. The standard of Nepalese Jute has gradually gone down in World market as the quality of Jute from other countries has increased and with it, the general level of grades and standards. The decline of Jute goods production has been attributed to higher costs of production due to inefficient management and technical know how in the industry.

The ratio of total Jute export in Nepal is in declining trend. It has declined from 87 Percent in 1971/72 to 38.04 Percent in 1977/78.

Table 1
Export of Jute and Jute Products to India
1978/79 to 1990/91

Year	Raw Jute	Jute cutting	Jute Products	(Rs. in million)
				Total export of Jute & Jute Products
1978/79	02.1	03.2	08.2	13.5
1979/80	12.9	07.5	08.3	28.7
1980/81	46.4	17.7	10.3	74.4
1981/82	43.4	18.2	81.0	142.6
1982/83	85.5	05.2	179.7	270.4
1983/84	36.5	01.2	212.1	249.8
1984/85	43.9	—	260.0	303.9
1985/86	02.3	—	167.4	169.7
1986/87	14.5	00.5	164.0	179.0
1987/88	44.1	08.6	188.7	241.4
1988/89	36.5	10.5	134.0	181.0
1989/90	117.5	00.0	04.5	122.0
1990/91	05.4	—	272.3	277.7

Source : Nepal Rastra Bank, *Quarterly Economic Bulletin* 1978/79 to 1990/91

The Table shows that since the fiscal year 1978/79 to 1990/91 the export of raw Jute, Jute cutting and Jute products to India have been fluctuating. The total export of Jute and Jute products in the fiscal year 1978/79 was Rs. 13.5 million while it increased to Rs. 270.4 million in the fiscal year 1982/83. In the fiscal year 1983/84 the exported amount of Jute and Jute products decreased to Rs. 249.8 million, but it increased to Rs. 303.9 million again in the fiscal year 1984/85. Since then the export of Jute and Jute products have been declining. It has declined to Rs. 122.0 million in the fiscal year 1989/90, but in the fiscal year 1990/91 it has again raised to Rs. 277.7 million and has been slumped down to 139.0 million in the first 8 months of fiscal year 1991/92. This proportion shows an decreasing trend in the total export of Jute and Jute products to India.

Decrease in export of Jute and Jute products to overseas countries have been quite rapid during the fiscal year 1974/75 to 1978/79. Since the fiscal year 1979/80 the rate of exported amount slowed down and it has continued there after. The exported amount of Jute and Jute products in the fiscal year 1978/79 was Rs. 283.4 million while it slowed down to Rs. 234.6 million in the fiscal year 1979/80.

This declining trend is attributed to —

- Functions and uneven practices in world Jute market.
- Developed Countries injected cheap synthetic goods, so there was a substantial fall in the demand for the international Jute market.
- Low quality products and high costs led for a fall in jute export.

The cyclical pattern in demand for Jute has little resemblance to that of the World trade due to the operation disrupting factors which restricted the expansion in Jute and Jute goods trade. Jute market is practically a world market (With Bangladesh, India, Thailand, U.K. U.S.A., Belgium, Canada and Nepal) operating together as one single market, in the sense that events in any one of them at once communicate their affects to the others. This also caused of decline in Jute export. The export of Jute and Jute products to overseas is as the following:

Table 2
Export of Jute and Jute Products to overseas countries
1974/75 to 1990/91

Year	Raw Jute	Jute Products	Total (Rs. in million)
1974/75	45.9	34.3	80.2
1975/76	64.5	56.2	120.7
1976/77	100.3	58.6	158.9
1977/78	170.0	63.2	233.2
1978/79	158.6	124.8	283.4
1979/80	119.6	115.0	234.6
1980/81	94.7	28.6	123.3
1981/82	62.6	01.5	64.1
1982/83	13.7	-	13.7
1983/84	-	-	-
1984/85	-	-	-
1985/86	28.9	-	28.9
1986/87	21.6	-	21.6
1987/88	30.3	00.4	30.7
1988/89	0.00	0.00	0.00
1989/90	11.3	04.1	15.4
1990/91	2.5	-	02.5

Source : Nepal Rastra Bank, *Quarterly Economic Bulletin*, 1974/75 to 1990/91

The above Table shows that from the fiscal year 1978/79 the ratio of total exported amount of Jute and Jute products is in declining trend. It slowed down to Rs. 02.5 million in the fiscal year 1990/91 and remained stagnated in 1988/89. In the first 8 months of fiscal year 1991/92 the export of Jute and Jute products to overseas is nil. This declining tendency is due to the competition with some other exporting countries and also due to the competition with substitutes. The quality of Jute goods is inferior than Bangladesh and India. If we consider the required quality for export in the world market. Hence, in recent years export of Jute goods from Nepal concentrated to Indian markets only.

At present, Jute and Jute products have become a very poorer source of convertible foreign exchange earning. Woolen carpets and readymade garments have registered sharp increases in export earning in recent years. There are certain reasons for declining in export-ratio of Jute and Jute products such as severe competition from synthetic substitutes, low quality of product, excessive price fluctuations, falling international demand etc. Which make difficult to face the competition with Bangladesh,

Thailand and other principal Jute exporter countries one hand and on the other, the products of Jute produced, do not meet the standards and requirements of the world market.

CAPACITY UTILISATION

So, far as the capacity utilisation is concerned, capacity utilisation of Nepalese Jute industry has been falling down. Capacity utilisation is responsive to anticipated demand. Declining anticipated demand for Jute goods causes fall in capacity utilisation in Jute industry. A picture of capacity utilisation of Nepalese Jute industry can be seen from the following table.

Table 3
Capacity utilisation of Jute industry, in Nepal
1975/76 to 1989/90

Year	Capacity utilisation (%)
1975/76	75
1976/77	79
1977/78	77
1978/79	73
1979/80	75
1980/81	82
1981/82	78
1982/83	72
1983/84	107
1984/85	101
1985/86	60
1986/87	67
1987/88	75
1988/89	54
1989/90	24

Source: Department of Industry, *Industrial Statistics, Manufacturing Industries, 1990/91 HMG/N*. Ministry of Industry.

The table shows that capacity utilisation of Nepalese Jute industry has been falling down. In the fiscal year 1983/84 capacity utilisation was as high as 107 percent which came down to 24 percent in the fiscal year 1989/90. Power shortage, labour disputes and other bottlenecks hamper capacity utilisation in entire Nepalese jute industry. Although capacity utilisation raised to 37 percent in first 9 months of fiscal year 1990/91, but still is very low in comparison of previous year. This has been due to mainly pessimism in anticipated demand for jute products in world market, low stocks of jute goods, scarcity of raw Jute etc. In the light of above problems UNDP. Jute Fact and Finding Mission strongly recommended that the Jute producing countries should follow the example of the wool producers, the cotton, the rubber producers and

others and join hand in setting up an international research and development centre of their own. But this may seem a difficult step for countries which are better rivals in jute trade. The fact is that competitive pressure in world market today are so thought and are likely so become so much tougher that jute producers if pool their resources in both the research and the promotional fields and make a major collective efforts to rehabilitate the jute industry.

According to the installed capacity yearly requirements of raw Jute for will consumption and domestic purpose is around 35,000 M/T. The total output from the mills is approximately 28,500 M/T based on 24 hectare working per 300 days per annum. But these mills are not running under full capacity due to their well known sickness. Jute goods produced by these industries are not fully consumed in domestic market. These are exported mainly to India. Considering their present capacity utilization and for domestic need, total requirements of raw Jute comes around 25,000 M/T annually. Here lies the question, if raw jute export is not feasible considering the international market price, why should jute growers be encouraged to produce more jute ?

AREA, PRODUCTION AND PRODUCTIVITY

Area, production and productivity of Nepalese Jute have been declining trend in recent years. They are becoming very narrow in their size and volume. Following Table shows the details of area, production and productivity of Jute in Nepal.

Table 4
Area, Production and Productivity of Jute in Nepal
1974/75 to 1990/91

Year	Area	Product	Productivity
1974/75	33	41	1.23
1975/76	34	41	1.21
1976/77	33	45	1.36
1977/78	40	56	1.04
1978/79	47	66	1.04
1979/80	57	68	1.19
1980/81	52	59	1.14
1981/82	35	43	1.21
1982/83	30	39	1.28
1983/84	24	25	1.06
1984/85	27	33	1.29
1985/86	47	61	1.29
1986/87	20	23	1.18
1987/88	14	15	1.04
1988/89	14	18	1.29
1989/90	13	16	1.23
1990/91	14	16	1.14

*
 Area - in. 000 hectares
 Production in, 000 M/T
 Productivity in M/T Per hectare

Source : Ministry of Finance, *Economic Survey* 1990-91 HMG/N,

The above Table shows that area under cultivation of Jute in the fiscal year 1974/75 was 33 thousand hectares, while it decreased to 14 thousand hectares in 1990/91. However, in the fiscal year 1979/80 it reached to 57 thousand hectares, but it has continued to slowdown thereafter, Production and productivity of Jute have been too declining trend in recent years. In the fiscal year 1974/75 production of Jute was 41 thousand M/T and 68 thousand M/T in FY 1979/80 while it was only 16 thousand M/T in 1990/91. Since the fiscal year 1974/75 to 1979/80 the production of Jute increased to 41 thousand M/T to 68 thousand M/T and after that it has been fluctuating and except in the FY 1985/86 it is constantly declining. Productivity of Jute has been also fluctuating. In the fiscal year 1974/75 the productivity of Jute was 1.23 M/T per hectare while it decreased to 1.14 M/T per hectare in the year 1990/91.

CONCLUDING OBSERVATIONS

The study of Mr. M Petruza reveals a gloomy picture of the Nepalese Jute industry. Mr. Petruza, on the basis of findings made intensive recommendation to HMG/N in the field of Jute cultivation, marketing and industry. Measures to raise the productivity in the field of Jute cultivation has been emphasized. It was recommended, on the marketing side, to uplift the grading practices and new grading standards for Nepalese Jute. Comprehensive programme to modernise plants and equipments was prescribed so as to raise the efficiency and the quality of Jute industry and Jute products.

The declining phase of Jute production may chiefly be associated with the technological and managerial weaknesses in the Nepalese Jute industry leading to higher cost of production and low quality of the Jute goods. So, in the future growth of Jute industry will mainly depend on the efficiency in keeping price of Jute goods at a competitive level with that of synthetic substitutes. Nepal, being an underdeveloped country is characterised as "poor capita" or "Low saving and low investment" Economy. Even a single capital item has to be imported. All the goods to be exported has to go through India and it is a fact that it depends on India's mercy whether to provide with wagons or to levy taxes. Since Nepal has to depend largely on international demand for her jute exports, one could visualise how difficult it would be to tackle such a situation for a least developed and land-locked country like Nepal, which has a very little say in the world market. On the other hand, the market of Jute goods is affected by the excessive price fluctuations and falling international market of Jute, caused mainly by the server competition from synthetics and other substitutes. Competition of Jute with artificial fibres is on of the most important factor for low demand of Jute products. Apart from the above external problems industrial units of Jute face internal problems such as labour problem, poor quality and wretched productive capacity caused by the existing old-aged machines, lack of trained technicians, managerial weakness, raw Jute

problem, problem of batching oil, coal etc. All the factors affecting the jute sector can be categorised in Domestic factors and International factors. Domestic factors are sick. Jute industries low domestic consumption, absence of organised and guaranteed market for domestic trade of raw Jute and Jute goods high prices and low productivity of Jute cultivation. International factors are severe competition substitutes, synthetic low quality of Jute products, no direct contact with international marketing agencies, not marketing research excessive price fluctuation etc.

In spite of the fact that Jute industry has now become a decaying industry in Nepal, there lies certain hope if following measures are practiced:

- (i) More attention should be paid in quality control rather than the quantity of Jute and Jute products.
- (ii) Production techniques should be rationalised.
- (iii) For the higher labour productivity and lower cost of production efforts should be made on the method improvement and work standardisation in the mills.
- (iv) Relief in excise duty be provided so that the industrial units compete cost wise internationally
- (v) In order to increase the bargaining power of Jute growers so that the quality is maintained, Jute growers association should be oriented to the interest of the real farmers.
- (vi) Jute cultivation holdings are of very small size, so to avoid narrowing profitable gap is time bound need.
- (vii) To give the real fruit to the farmers, middle-men should be displaced and market should be organized on cooperative basis.
- (viii) Adequate warehousing facilities, efficient transportation and communication system, market information and organized agencies for marketing and management training should be made available.
- (ix) Institutional efforts for quality control, standardisation, specialization, market study and low cost techniques are greatly needed to satisfy the international demand.
- (x) There should be a national Jute policy which would manage the domestic and internal factors. Following should be the basis of Jute Policy :

Jute agriculture production planning

Fixation of remunerative price before sowing of Jute

Proper marketing net work and institutional develop production diversification etc.

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BOOK REVIEW

Ramakant; B.C. Upreti (ed). (1992) "Indo-Nepal Relations" South Asia Studies Centre, University of Rajasthan, Jaipur. South Asian Publishers Pvt. Ltd. New Delhi, India. PP ix + 350 Price IRs 367.

The book, the collection of articles of the scholars from India and Nepal, tries to shed light on Indo-Nepal relation in new dimension. Traditional relation between India and Nepal on the one hand urge to interpret in new light have attracted many academicians of Nepal and India to view the relation from different angle. The contents of book vary from the discipline of political science to economics and, nevertheless, security to media and extra regional dimensions.

India, as an emergent great power is desirous of achieving balance in South Asia with her preponderance, its relations with Nepal is based on the bilateral Peace and Friendship treaty of 1950. However, there is no major contentious issue between Nepal and India, peace zone proposal of Nepal has created ideological differences and put India as the region domination over its neighbour in the eyes of Nepal and India's persistent refuse to include Nepal in negotiation of Ganga's water distribution with Bangladesh as a third co-riparian irritated Nepal. These cumulative tension lastly resulted in Indo-Nepal impasse March 1989.

The editors two of the book while opening introduction pierced that India and Nepal have very complex and multi structured relationship, nevertheless the editor duo missed to mention that it is sensitive too. India while being superior in all aspects of life and fairly advance in economic development stage, Nepal also carries an independent image historically and its different stand point on different international issues to Indian stand point is indicative of her urge for identity; however, both are follower of NAM. So any effort to exploit minor issues has led to a crack in the wall of friendship of the two countries, and Nepal being a small and land locked becomes more sensitive to such issue. This is a realization of hard truth and prof Lok Raj Baral substantiates when states "..... Nepal's quest for an enhanced international status, which was perceived as a source of national security, continued in the 1970s and 1980s....." If two countries can not part their ways they should be bound to do so from both the side because they share common problems; poverty, social backwardness, over population, forcing the government to lean on outside economic assistance and more have geographical compactness. And R.S. Chauhan is right when he suggests "..... India should not get itself involved local politics of Nepal it should try to restrict its relations with Nepal to mutual economic matters, irrigation and power projects controlling floods, population and deforestation it is not feasible to have a working security arrangements with a buffer state like Nepal..... hence India should not insist for a common security perception with Nepal....."

While dealing nationalism and foreign policy B.C. Upreti opines "..... It may be pointed out here that to some extent Nepal's apprehensions of being overshadowed by India forced to seek its self identity and independence but this has been over emphasised " As he accepts "..... the context of Indo-Nepalese relations is basic to any understanding of Nepal's national aspirations and foreign policy.....".

Here, it is worth suggestive that India's self assertion and creation of self image have been the flaring up of discontent between the two countries occasionally. Though political liberalism will give encouragement to schisms based on ethnic, linguistics and regional loyalties so India should handle friendship ties in new dimension and Anirudha Gupta is right when he suggests "..... India must realize that any weakening of Nepal's national integrity, whatever be the source, would harm the building of democracy in Nepal as well as our national security"

Besides, above mentioned problems the book throws light on bilateralism and multilaterlism in Indo-Nepal trade, trade and transit relations and investment in Nepal from India, but the issues have undergone to a considerable change after the establishment of multi-party democracy and economic liberalisation in Nepal, so they draw less attention in current context.

The one important opening of relevant issue in the book that has been done by M.D. Dharamdasani of Banaras Hindu University is of China factor in extra-regional balance as influencing power in South Asian affairs. He has tried to assess the role of China when he says "..... China adopts consistent approach towards these countries" where super powers have been reluctant to be involved in the contentious issues between India and her neighbours, China has usually come out in support of small powers.....". But this analysis, perhaps has neglected role now China has to play decisively in the this region as super powers have been cut to the size of single power only due to dissolution of USSR only but with being more detente. So era of her passive role has been vanished. Her status as a balancing force in the area is further confirmed with the fall of Soviet Russia, which, though Dharamdasani tried to peep has not dealt with in depth.

With all this review to South Asia Studies Centre of University of Rajasthan has did commendable works putting different views on India-Nepal relation compiled in the book. The book is worth reading in general and specific for those who view India Nepal relation in new perspective.

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ERRATA

Concerning Vol 14, No 4, October - November, 1991

- (i) Page 1, Line 30, read as Department of Economics - instead of economic
- (ii) Page 37, Line 42, read as UNICEF 1991 - instead of UNICEF 1992
- (iii) Page 38, Line 8, read as World Bank 1991 - instead of World Bank 1992
- (iv) Page 42, Line 25, read as World Bank 1991 - instead of World Bank 1992
- (v) Page 42, Line 39, read as UNICEF 1991 - instead of UNICEF 1992
- (vi) Page 44, Line 16, read as UNICEF 1991 - instead of UNICEF 1992
- (vii) Page 44, Line 22, read as World Bank 1991 - instead of World Bank 1992