

FALKLAND ISLANDS ECONOMIC SURVEY 1976

<u>Page</u>	<u>Recommendation</u>	<u>Action Taken</u>	<u>Comments</u>	<u>File</u>
7	1.00 <u>AGRICULTURE</u>			
	1.01 There is a general need for training and improving the skills of the work force.	A sheep-shearing instructor was recruited and gave instruction during two seasons but this was prior to the Shackleton Survey.	Unsuccessful attempts were made to recruit a suitable person to send to the UK on a shearing course as ODM were reluctant to fund further instruction.	FCO/5/9
10	1.02 No brand name or trade mark which would help promote Falklands wool as a speciality with a distinct brand image has been established.	The nearest this has got to implementation was the brand name of BRONTE knitting wool.	This is for the industry to pursue.	
14	1.03 Extension of GTU - i. develop adequate milk supply for Stanley; ii. advise on upgrading of cattle population and investigate beef/mutton/lamb production for local consumption and export; iii. advise on intensive animal production (poultry, eggs, pork, veal); iv. assessment of practicability of sheep breeding scheme and development of fleece assessment scheme.	The GTU policy is controlled by a committee which includes consultant supervisors and the ODA Agricultural Adviser who visit the Falklands to consider progress and make any changes necessary.		
44	1.04 Establishment by phases of an Agricultural Dept. by FIG to - i. administer legislation; ii. crown lands; iii. provide information and advisory services; iv. research and development	An attempt was made to recruit a suitable local officer. The creation of an Agricultural Dept. must await the recommendations of the GTU.		AGR/5/1

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46	1.05 Establishment of smaller farm units.	Green Patch purchased to be leased to successful applicants.	Plans are well in hand for this project. Tenants will take over in 1980.	LND/31/3
47	1.06 Fencing grants.	Implemented	Fencing grants to small farm units continue on a reduced scale.	DEV/2/5
47	1.07 Assistance in land improvement - ditching.	Considered but not implemented.	This is a matter for farms. It is of doubtful economic value. GTU advice is generally towards other forms of land improvement by experimental re-seeding schemes.	
48	1.08 Farm Management: standardise methods of recording financial data; need for professional accountancy business; regular seminars.	Considered but not implemented.	These matters are for the industry to implement. An attempt was made to standardise accounts.	
48	1.09 Horticultural Feasibility Study.	Implemented.	Study undertaken by Mrs. Davidson. CDA consider that much more definite market data is required before any development programme could be considered. Poor and infrequent communications would make a viable unit extremely difficult.	DEV/3/2
48	1.10 Form a sheep importation advisory panel.	Not implemented.	This is a matter for the private sector. Enquiries suggest that it would be impracticable to form this panel.	
48	1.11 Agricultural education and training to be included in school syllabus. Larger farms to appoint a part time training officer.	Planning going ahead.	This depends on the completion of the Coseley Buildings project to be funded by CDA.	DEV/2/9B
49	1.12 Appoint a wool marketing adviser.	Implemented.	Mr. Peirse's report expected in August 1979.	AGS/7/15

Recommendation

Action Taken

Comments

File

50	2.00 <u>AQUATIC RESOURCES</u>			
51	2.01 Survey of fresh water and anadromous fish resources. FIG to consider salmon ranching.	Implemented.	Dr. Hall, Principal Fisheries Adviser of ODA, Mr. Cole of the Tropical Products Institute and Dr. Thorpe have visited the Falklands. Further advice of ODA awaited.	FIS/7/5
51	2.02 FIG to consider study of kelp resource, including scope for processing on Falklands. FIG to consider the appointment of a research officer to study kelp ecology.	Not implemented.	Kelp: we have approached alginate interests in USA, Japan etc. without result as yet. Use of kelp as animal nutrient and as fertiliser have been considered by GTU; sample testing was proceeding with C.P.I.	
52	2.03 Survey of shell fish resources.	Partially implemented.	Dr. Hall was to consider the possibilities of shell fish exploitation.	
52	2.04 FIG to invite ODA MAFF and White Fish Authority to conduct exploratory fishing survey of coastal and off-shore fishing resources. Depending on results a pilot development and commercial exploitation may follow.	Partially implemented.	The White Fish Authority are carrying out a desk study.	FIS/29/1
54	2.05 Fish farming: pilot scheme dependent on prior development of other Falkland based fisheries.	Not possible at this stage.	Must await developments.	
54	2.06 Monitor krill and fish resources south of the Antarctic Convergence by participating in other countries and international organisations research projects in the south west Atlantic. Extend present UK marine	Not possible until development of fish resources can be started.	Awaiting developments. BAS are conducting research - BIOMASS programmes. FIG are potential signatories of Antarctic Marine Resources Conservation (Canberra) Convention now being internationally negotiated.	

<u>Page</u>	<u>Recommendation</u>	<u>Action Taken</u>	<u>Comments</u>	<u>File</u>
	biological programmes on krill resources, management, and detection by fishery vessels.			
55	2.07 Evaluation of population and growth rate of seals should precede commercial exploitation.	Partially implemented.	Mr. Strange's seal count in Falklands and BAS research at South Georgia.	
55	2.08 South Georgia legislation on live specimens to be extended to the Falklands. Scale of fees to be reviewed. Revenue to be used for ecological research.	Partially implemented.	There is a virtual embargo on the export of wildlife which is not encouraged. Licensing legislation is adequate for endangered species.	
56	2.09 Fisheries management and conservation. HMG to promote establishment of convention for control of south west Atlantic fishery. A design study for a fishery patrol/research vessel to be commissioned.	HMG to implement.	This is a long term measure which depends on future development of resources.	
57	3.00 <u>MINERAL OIL RESOURCES</u>			
58	3.01 Enactment of a new mining (mineral oil) ordinance to inter alia vest all mineral rights in the Crown.	Not yet implemented.		
60	3.02 In advance of any political settlement an interim programme should be initiated to include: (a) appraisal of Birmingham University's processed seismic data		We are awaiting data.	

Recommendation

Action Taken

Comments

Date

- (b) purchase and evaluate some commercial seismic lines in the Argentine section from the Malvinas basin
- (c) EMG to monitor oil developments in Argentina

62 4.00 INDUSTRY AND CRAFTS

- 62 4.01 FIG to encourage small scale projects (sheepskin pickling, skin processing and possibly weaving.)

Implemented. Fellmongery report received.

Small scale preparation of skins and export is undertaken.

DEV/29/11

- 62 4.02 Feasibility study of meat collection and freezing. Mutton exports.

Cannot be implemented yet. SOA to implement.

To await the outcome and recommendations of GTU. SOA have a contract but the difficulty is finding a shop to take the sheep away. A small scale knitwear co-operative has been established. Technical assistance may be needed to expand it.

- 63 4.03 Consideration to establishment of knitwear industry including:
- (a) assessment of labour availability
 - (b) organisational and materials study
 - (c) provision of a design consultant
 - (d) provision of a technical experts
 - (e) subsidised premises
 - (f) training

Not yet implemented

64 5.00 TOURISM

- 64 5.01 Tourism development study to be commissioned.

Not yet implemented

This will be borne in mind when there is evidence of real development of tourism. Meanwhile the investment of \$25000 in the Fitter venture and purchase of an Islander will help develop tourism.

DEV/29/1
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Recommendation

Action Taken

Comments

File

64	5.02 Appointment of commercial tourism promoters to follow-up recommendations of development study (see 5.01 above)	Not yet implemented.	This will be borne in mind when there is evidence of real development of tourism. Meanwhile the investment of \$25000 in the Fitter venture and purchase of an Islander will help develop tourism.	
65	5.03 Consideration of concessionary finance for accommodation and travel facilities.	Not yet implemented.	As above.	
65	5.04 Tourist facilities in Starley.	Considered and some progress made.	Much depends on the development of tourism which hasn't developed beyond the "shopping" stage.	DEV/7/2
65	5.05 Legislation.	Not implemented.	When tourism develops this will be considered.	
65	5.06 Ecological monitoring.	Not implemented.	For the future.	
65	6.00 <u>TRANSPORT</u>			
66	6.01 FIG to finance extension of permanent airfield by 950 metres to accommodate short/medium haul jets and partially loaded long haul jets. Subsequent discussions with South American Governments and airlines over establishment of direct flights.	Desk study commissioned and provisional figures supplied.	It looks as if the cost of this will be prohibitive.	AV/AP/9
66	6.02 FIG to ensure that FIG take account of Islander interests in decisions affecting sea freight service. Consideration of direct lines with Argentine shipping lines with South American ports. FIG to be encouraged to study	Being kept in mind.		

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	improvement in jetty handling facilities possibly by mechanisation FIG involvement in FIC plans which may affect public jetty.	FIC now has two fork lift trucks.		
67	6.03 Internal air service. Initial air service pricing structure review to lower FIG subsidy. Technical and economic advice required over aircraft replacement policy.	Implemented. Air fare structure has been investigated.	Rates revised. Islander purchased.	
67	6.04 Consideration to expanding coastal shipping service by introducing small, faster passenger/freight craft.	FIC are considering obtaining a larger vessel.	Mr. Fitter also has plans to operate a vessel carrying passengers.	DEV/29/1
67	6.05 Roads (a) Stanley - improvement not feasible due to shortage of labour and other priorities for labour force. (b) Camp - appointment of a road engineer to investigate technical and economic consideration of low cost road construction. FIG to evaluate these and if costs are acceptable proceed with initial road from Stanley/Darwin. Construction crew should be a mix of imported and Falklands labour. Assistance from the Royal Engineers may be sought.	Implemented. Implemented.	Repair Stanley roads proceeding. Darwin road started.	

<u>Page</u>	<u>Recommendation</u>	<u>Action Taken</u>	<u>Comments</u>	<u>File</u>
69	7.00 <u>INTERNAL TELECOMMUNICATIONS AND BROADCASTING</u>			
69	7.01 R/T system to provide 24 hour service.	Considered and partially implemented.	New R/T sets available.	
69	7.02 Improvement should be made in quality and content of local broadcasting. Agree FIC decision to hire transmitter from Cable and Wireless.	Implemented. Broadcasting Adviser's report received.		BRD/5/1
69	7.03 Feasibility study should be undertaken on the introduction of TV in the Camp using video cassettes.	Implemented.	Mr. Fletcher, media consultant of the British Council advised that this was impracticable.	EDU/7/4
71	8.00 <u>INVESTMENT AND BANKING</u>			
71	8.01 FIG should offer investment incentives in the form of loans for particular projects. An assistance fund should be established to provide the financial help (see also 8.02).	Partially implemented.	No assistance fund has been established but (a) the principle has been met by housing loans, small farm purchase, (b) capital allowances implemented.	
72	8.02 FIG to approach a UK bank to provide commercial and merchant banking services.	Action taken but no major UK bank interested.		
72	8.03 In absence of commercial bank FIG to establish Revolving Loan Fund.	Not implemented; but loans are made provided funds available.		
73	8.04 Government Savings Bank recommendations -			
	i. review rate of interest	i. Implemented		
	ii. abolish tax concession	ii. considered but rejected		
	iii. review investment policy.	iii. being implemented.		

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73	8.05 HMG to consider relaxing exchange control regulations governing direct UK investment in the Islands, or re-including the Falklands in the Scheduled Territories.	H MG to undertake.		
75	9.00 <u>TERTIARY SECTOR SERVICES</u>			
75	9.01 FIG to encourage wholesale and retail trade; local purchases from South America.	Implemented.		
75	9.02 FIG should ensure certain minimum fuel holdings in Stanley.	Implemented.	Stock records are obtained from Y PF and the position monitored.	
76	9.03 The YPF Agreement should be implemented as soon as possible.	Implemented.		
76	9.04 Oil Jetty. A single buoy floating system should be examined.	For HMG to consider.		
76	9.05 The reintroduction of a local newspaper should be encouraged (possibly with financial assistance from FIG).	Unnecessary at this stage.	There is a small bi monthly duplicated news sheet. If modern printing equipment is obtained it may be possible to encourage the production of a frequent and regular paper.	
26	9.06 Filtration Plant improvements.	Implemented.		
77	10.00 <u>MANPOWER AND POPULATION</u>			
77	10.01 Review problem of Islander "brain drain" caused by CSAS staffing of FIG. HMG introduce scholarship grants for Islanders.	Partially implemented. ODA has agreed to fund sixth form college candidates.		

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77	10.02 HMG offer OSAS terms to qualified Islanders living in the UK.	Not implemented. Being considered.		
77	10.03 FIG and professional associations to improve company recruitment and induction procedures by preparing briefing material about the Islands, and seeking professional advice about recruiting methods.	Partially implemented.		
77	10.04 Consideration of simplification of Camp Wage agreement structure.	Not implemented.	Neither party wants any change.	
78	10.05 Revise FIG salary scales.	Implemented		STF/12
78	10.06 Revise Cost of Living Index.	Being considered.	Review contemplated in the near future. Awaiting further information from Mr. Ritchie.	
73	10.07 FIG to consider financial and staffing problems of the General Employees' Union.	Not necessary	The financial position of the GEU is better than it was; no difficulties foreseen. No staff difficulty. They are affiliated to ICFTU.	
78	10.08 FIG to consider establishing a formal forum for the Civil Servants' Association (of Whitley Council). Also links with a UK Union.	Not considered necessary.		
78	10.09 FIG collate statistics on population, emigration, immigration, jobs and opportunities in the Islands.	Implemented.		

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80	11.00 <u>SOCIAL INFRASTRUCTURE</u>			
80	11.01 FIG to transfer housing loans scheme to commercial banking organisation.	Impossible.	No commercial bank.	
80	11.02 Camp workers to be given opportunity for house purchase in Camp. Professional associations and Union to take initiative.	Considered.	Few farms are likely to commit themselves to providing houses which would in effect call for yet more houses as more people stayed on the farm.	
80	11.03 FIG to review housing.	Implemented.	Funds are allocated for a small housing scheme.	
81	11.04 Centralisation of secondary education in Stanley with the construction of a new boarding house and additional facilities.	Implemented.	Hostel being built.	
82	11.05 Improved Camp teaching. Camp teaching should be improved by the replacement of VSO teachers with certificated/ more full-time teaching in settlements; and the phasing out of teaching visits to outside Shepherds. There should be periodic seminars for Camp teachers.	Implemented.		
82	11.06 Overseas secondary scholarships should be phased out when the new secondary school is built in Stanley.	Implemented.		
82	11.07 Vocational training should be introduced in both secondary schools and for youths and adults outside the educational system.	Being implemented.	Planning proceeding.	

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82	11.03 The Education Department should have additional clerical assistance.	Implemented.		
83	11.09 FIG should control, through a Community Education officer, adult education, recreation, and development including the fostering of community councils.	Being implemented.	When the Coseley building project is complete community education facilities will be available.	
83	11.10 FIG to establish a social development fund to finance 11.09 above.	Not implemented.	This is something for the future.	
83	11.11 A permanent social worker should be appointed.	Not implemented.	A permanent social worker is not considered necessary in a population of about 1800 with full employment.	
83	11.12 Consideration to be given to providing sheltered houses/old peoples' homes (see also 11.14).	Not implemented.	The Hospital provides accommodation for elderly persons who have no home or who are unable to look after themselves. More urgent housing problems to be tackled first.	
8	11.13 Review of medical charges and introduction of compulsory health insurance.	Implemented.		
84	11.14 Consideration to be given to the construction of a patients' hostel (possibly combined with 11.12 above).	Not implemented.	More pressing needs have to have priority.	
84	11.15 Stanley Hospital: standards will require uprating (no detailed recommendation).	Implemented.	New equipment has been provided. A new x-ray unit is being obtained through EDF. Camp medical kits introduced.	
84	11.16 A health visitor/district nurse should be appointed primarily for Camp duties.	Not implemented.	A fourth nursing sister has been appointed.	

<u>Page</u>	<u>Recommendation</u>	<u>Action Taken</u>	<u>Comments</u>	<u>File</u>
85	12.00 <u>ENVIRONMENTAL CONTROL AND RESOURCES MANAGEMENT</u>			
85	12.01 FIG should establish an Environmental and Resource Management Committee with a permanent scientific advisor.	Not implemented.	A Conservation Foundation is being formed.	
86	12.02 FIG should enact a national resource and environmental control ordinance.	Not necessary.		
86	12.03 Consideration to be given to the establishment of a Falkland Islands Scientific Research Agency to co-ordinate and advise on natural and social scientific research and environmental monitoring. ODM and NERC to assist. Suggest links with other academic and research bodies.	Not implemented.		
88	13.00 <u>ORGANISATIONAL CHANGES</u>			
89	13.01 Appointment of a Chief Executive to supervise the administration of the Colony, and formulate future economic developmental policy.	Not implemented.	This would not be necessary until major economic development takes place.	
89	13.02 Appointment of a Development Officer, reporting to the Chief Executive, to be responsible for day to day economic development.	Implemented.	Post created.	
91	13.03 Exco and Legco Committees: FIG should appoint officials to service Committees.	Impracticable at this stage.		

<u>Page</u>	<u>Recommendation</u>	<u>Action Taken</u>	<u>Comments</u>	<u>File</u>
91	13.04 Exco and Legco Committees: Non Exco/Legco members to be co-opted.	Implemented.		
91	13.05 Exco and Legco Committees: Sub-committees to be established dealing with specific aspects of broader subjects.	Partially implemented.		
91	13.06 Exco and Legco Committees to be given financial authority to allocate from specific funds.	Impracticable in present circumstances.		
91	13.07 Consideration be given to the establishment of Community Councils responsible for expressing local views and forwarding proposals from smaller committees.	Impracticable.		
92	13.08 FIG should seek to involve themselves in FIC policy making and devise an institutional solution to ensure that the Company gives due weight to the interests of the Islanders.	Not implemented.	Attempts are being made to establish a closer working arrangement.	
100	14.00 <u>GOVERNMENT RECURRENT FINANCES</u>			
100	14.01 FIG should increase company taxation by 5%, and to increase the rates of capital allowances.	Implemented.		
101	14.02 FIG should increase personal taxation; review benefits in kind; and introduce small income relief.	Being implemented.	Taxation proposals before Council for consideration with a view to becoming effective on income earned in 1979.	

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102	14.03 FIG should increase certain import duties.	Not implemented.	Considered by Council who prefer to retain Stanley as a free port. For administration and manpower reasons reluctant to widen customs tariff.	
102	14.04 Philately. FIG should consider appointing a firm of UK stamp dealers to replace the Crown Agents.	Not implemented.	A decision was made to remain with the Crown Agents who were to pursue a more vigorous policy.	
102	14.05 FIG should increase licence fees for wildlife exports.	Not implemented.	There is a virtual embargo on the export of wildlife therefore no need for a review at present although it is kept in mind.	
103	14.06 FIG should increase Stanley rates, and review subsidies on other services.	Implemented.		
103	14.07 FIG should consider introducing a compulsory health insurance scheme.	Implemented.		