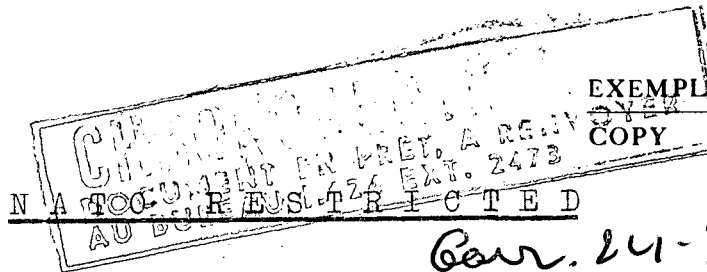


CONSEIL DE L'ATLANTIQUE NORD  
NORTH ATLANTIC COUNCIL



EXEMPLAIRE  
COPY

N° 220

*Par. 24-7-74.  
follow.*

ORIGINAL: ENGLISH  
5th June, 1974

WORKING PAPER  
AC/127-WP/398

ECONOMIC COMMITTEE

THE CZECHOSLOVAK ECONOMY

Draft Report to the Council

The Czechoslovak economy would appear to have picked up momentum after the initial difficulties following the Soviet intervention of 1968, and its average growth rate has been fairly rapid in recent years. However, living standards, although among the highest in Eastern Europe, have progressed much less rapidly and labour productivity remains below planned targets. The economy has retreated into orthodoxy under Moscow's supervision. In spite of traditional high standards in industry in many sectors of technology, the gap between Czechoslovakia and Western industrialised countries has been widening. Industrial production is still plagued by an excessive range of commodities with respect to the size of the domestic market. The overall impression of the economy is one of stability in the short-term and uncertainty in the medium-term in many sectors.

2. The country is heavily dependent on imports of raw materials primarily from the USSR. There is, moreover, little doubt that the current energy crisis has had its impact economically. The present petroleum needs are basically covered by the USSR with which Czechoslovakia has long-term contracts with five-year fixed prices. These prices are subject to upward revision at the beginning of 1975. Consequently the Czech government will clearly make every effort to exploit whatever natural energy resources it possesses (coal and lignite) with new mines being put into operation and older ones modernised. The country's nuclear programme also anticipates an important contribution to the overall energy programme by 1990.

I. BACKGROUND TO THE ECONOMY

3. Although there has been a steady increase in Czechoslovakia's urban population, there has been little change in the population of the main cities. Total population is around 14.5 millions. During the last twenty years, there has been a fall in the birth rate, especially in Bohemia-Moravia. The economy is hampered by a shortage of manpower and the fullest, but by far not the most efficient use is made of available resources, including pensioners and the wider employment of female labour.

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4. The country is not particularly well endowed with natural resources. Coal is the major mineral, although about two-thirds of this is brown coal; there are also abundant deposits of raw materials for the building and ceramics industries. Additionally, Czechoslovakia has deposits of uranium ore, magnesite and iron ore, but the bulk of the country's raw materials have to be imported. In particular large quantities of oil, natural gas and iron ore are imported from the Soviet Union. The raw materials position in the medium-term constitutes, perhaps, one of the country's most serious problems.

5. The most rapid development has taken place in the chemical and petrochemical industry which has expanded at an annual average rate of over 10% in the post-war period. The current plan envisages a further growth in output of nearly 60% during the plan period, and projects include the construction of two new oil refineries, and plants for the production of sulphuric acid, plastics, synthetic fibres and rubber, artificial fertilisers and polystyrene. Other major investment industries at present are motor vehicles, especially heavy truck production and building materials. Czechoslovakia also has the most important armaments industry in the Soviet bloc after the USSR. A serious stumbling block to the country's technological progress is its close dependence on COMECON and, consequently, on MOSCOW. Soviet attempts to achieve a technological balance among its members slows down the more advanced countries such as the GDR and Czechoslovakia.

6. About 62% of the total land area is devoted to agriculture. Of this, over 90% is farmed by co-operatives and state farms. The main crops are cereals, potatoes, sugar-beet and vegetables. Production of livestock and dairy produce is growing in importance. Nevertheless, the country is dependent on large imports of agricultural products to meet domestic requirements. The seemingly unpragmatic, long-term goal of autarchy in agriculture is far from being attained.

7. This situation has arisen from a combination of various factors, such as greater concentration on industrial development, the use of agricultural land for industrial purposes, the drift of labour from the land and problems associated with co-operative farming. Consequently, the main emphasis in agricultural development is being placed on the intensification and rationalisation of agricultural production.

8. During the present plan period (1971-1975), total investments of some Kcs 50,000 million (10% of total) are being allocated to agriculture. Of this amount, nearly Kcs 20,000 million are stated to be spent on machinery and equipment, and it is envisaged that by 1975, 90% of grain crops in the socialist sector will be harvested by combine harvesters, and other types of mechanisation will be considerably advanced. Domestic production of fertilisers is to be further increased and greater use made of improved strains of seed and pesticides.

9. The standard of living in Czechoslovakia is certainly one of the highest in Eastern Europe. Wages rising faster than productivity resulted in the emergence of inflationary pressures in the latter part of the 1960s. Accordingly, at the beginning of 1970, the government instituted a price freeze and strict wage controls, and these have been maintained since. The 1971-1975 plan aims to hold the increase in wages to 2.5-3% per annum, but this figure has been exceeded in the last three years. In 1971, for example, nominal wages rose by 3.7%; again, in the period 1971-1973, the average wage rose 11.6%, while officially the cost of living declined by 0.6%.

10. However, this rosy picture of a constantly rising living standard has been tempered by a number of recent articles and statements indicating that all is not well in the consumer sector. For lack of desirable consumer goods, the worker is reportedly putting more than one-third of his income into savings accounts. Personal savings will rise to Kcs 112,500 million by the end of 1974, which represents an increase of about 20% over an 18-month period.

11. As mentioned earlier, the employment situation in Czechoslovakia is tight and several industries are very short of labour. It is hoped that uneconomic enterprises can be closed and others mechanised so as to make more labour available for other industries. The current plan assumes an increase in the industrial labour force of some 300,000 persons. Recent long-term measures were announced to boost the family: This represents a sharp reversal of traditional policy. These include allowing the expectant mother a full salary for eight working months, 50% of her salary for three years and full job rights for a further two years. Abortions have been made very difficult by new legislation and severe prison sentences are imposed for violation.

## II. PLAN RESULTS IN 1973

12. In 1973, the social product increased 5.5% over 1972 and the national income 5.2%. This is slightly less than that registered in 1972, when the respective figures were 6.0% and 5.9% over 1971. Nevertheless, both results exceeded the 5.1% anticipated in the 1973 State Plan.

13. Industrial production rose by 6.5% - at the same rate as in 1972 but slightly less than in 1971 (6.9%), and more than the 5.3% envisaged in the Plan. The production of consumer goods was apparently favoured at the expense of capital goods, increasing by 6.9%, the production of capital goods rising by only 6.2%.

14. In the first two years of the Plan (1971-1972), the trend was opposite: thus the increase in output of capital goods for the period 1971-1973 is still greater than that for consumer items (i.e. 21.5% against 20.3%).

15. The structural changes in the fuel and energy basis were further implemented with greater stress on the "sophisticated" energy sources: the share of crude oil and natural gas in primary sources of energy reached about 25% in 1973 (1970: 19.2%). Consequently, the extraction of coal, brown coal and lignite could be cut down to around the level of 1970, i.e. about 109 million tons. Despite the increased amount of electricity produced (around 54,000 KWH in 1973 against only 51,402 KWH in 1972), consumption of power rose more rapidly, and the difference had to be offset by larger imports.

16. Reportedly, the Plan was fulfilled in a majority of individual sectors, e.g. chemical industry - actual increase 9.5% over 8.5% planned; engineering industry - 8.5% actual against 7.7% planned. Plan objectives were apparently surpassed in the metallurgical industry, and in the consumer goods and food branches also. The building materials target was not reached, however. In the building industry, output increased by 6.1% - less than in the two preceding years, when 10% and 9.9% increases were recorded.

17. In agriculture, both gross production and market output exceeded the targets. The Plan called for an upturn of 4% in the volume of gross output and the actual increase was 4.2% with vegetable output rising by 6.3% and livestock production by 2.5%: this was mainly due to the good harvest. The per-hectare yields of cereals (35.2 quintals) were the largest in the history of the country's farming.

18. Capital construction dropped behind planned targets: volume increased quite rapidly (by 7%), but remained behind the goal of 7.7%. Targets in the machinery and equipment sectors were also not reached. The number of unfinished projects increased, and severe criticism has been levelled by the authorities, at the average time needed to complete construction projects, i.e. 6.5 years. In particular projects above Kcs 1.5 million are hardly ever realised without great difficulty, except for those implemented with foreign aid. A key factor in the slow realisation of capital construction is said to be managerial inefficiency.

19. The structure of foreign trade was, reportedly, unsatisfactory. In exports, the share of machinery and equipment declined and that of consumer goods increased, while in the imports sector, there was a downturn in raw materials and an increase in machinery. Reports show that in 1973, Czechoslovakia's exports increased by 12.9% with the Socialist countries accounting for 7.6% and the Western industrial nations for 31.9%. Czech imports increased by 16% with the Socialist countries' share given as 11% and the Western industrial nations accounting for 25%. Czechoslovakia's reluctance to take up Western lines of credit on the Euro market hinges primarily on Moscow's attitude towards this sector, i.e. Prague continues to adopt a cautious attitude in expectation of the go-ahead from Moscow. Moreover the Czechs are in no mood to boost their hard currency indebtedness.

20. As a result of the moderate level of targets for 1973, the economy was able to absorb even quite serious irregularities such as the fact that 25% of industrial and some 33% of building construction enterprises are lagging behind the Plan and that one-third of industrial enterprises fell far short of the 5.8% industrial growth planned for 1973.

21. A survey of the 1973 results was made in November 1973 at an "Economic Plenum" of the Party. Criticisms were levelled at the insufficient degree of labour productivity in an industrially advanced country such as Czechoslovakia; even the most modern technology was not being utilised fully and work time was being wasted, e.g. it was being used only 70%-80% in the engineering industry and "even less" in the building sectors. The Plenum announced a large cut in the value of new capital construction for 1974, warning that some key projects were way behind schedule, including power stations, petrochemical plants and communications installations.

### III. PROSPECTS FOR 1974 AND BEYOND

22. The Plenum stressed that serious problems are expected in connection with the 1974 Plan. Approximately a 5% increase in national income is envisaged with about the same increase in real income. Industrial output is to increase by 5.8%, building construction by 7.5% and agricultural production by 3.8%.

23. As regards the planned increase in real income, the Plenum issued the usual warning that wages "must be in keeping with the work performed". Referring to the projected restructuring of the wage system, it noted that work on the reorganization of wages was progressing rather slowly.

24. Meeting the growing demand for energy will, according to the Plenum, create serious problems during and after 1974. Since the entire increase in this sector will have to be met through imports, the 1974 situation will be complicated, especially as regards the supply of electricity and gas. This warning was levelled not only at large consumers, but also at households.

25. The Plenum also touched on the next Five Year Plan (1976-1980) and pointed out that the increase in manpower would be only half as great as in the current Plan. Compensating for this would be a difficult and costly process. Given the limitations of their domestic market, the Czechs have long realised that they produce too wide a range of industrial goods with a consequent lack of quality. Although aware of the need for greater specialisation, the existence of plant in the local community is extremely important to ensure ongoing employment. There is, moreover, little doubt that Czech technological standards have declined over the years compared with western advances, especially as a result of the country's close association with COMECON.

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26. On the consumer side, although officials state that the country could afford a certain increase in consumer goods imports (the figure of 25% of the total import bill against the present 15% is often mentioned) the main thrust of the government's strategy remains to import technology. With their position of considerable technological strength, the Czechs have shown interest in buying Western equipment, but primarily, in a few fields only, e.g. electronics, locomotive engineering. This approach limits co-operation with the West, especially as hard-currency outlays are only considered justified if they enable R&D to be disposed with.

27. More effort is being made to discover actually what the consumer wants, itself an admission that Czechoslovakia is now a buyer's market. Steps are also being taken to allow for the obsolescence of an article in setting its price, a practice which is still frowned upon in some COMECON countries as wasteful.

28. Ironically, although much is being done to improve the lot of the consumer, the shortcomings have been accentuated by the government's raising of wages. It is a question of balancing the market, a problem faced by many of Czechoslovakia's partners, e.g. in Poland, where prosperity is rising. In the longer term, it will add a new dimension to economic planning; demand will have to be planned accurately and output limited to avoid waste. However, this is not an immediate problem for the country.

29. The general economic trend appears stable at present, and the government has promised that it would continue the policy of stabilising retail prices through 1974 without raising the retail price level. On the other hand Czechoslovakia's basic economic difficulties remain unresolved: these comprise the continuing shortage of manpower and consequent low labour productivity; the impossibility of achieving autarchy in the agricultural sector; close dependence on Moscow through the COMECON programme, which slows down and lowers Czech technological levels and depresses living standards. Impossibility of COMECON satisfying Czechoslovakia's need for high value added goods production; and the lack of flexibility within the economic system which is politico-ideological in origin and which is exacerbated by the country's ties with Moscow.

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TABLE 1

GEOGRAPHIC PATTERN OF DEVELOPMENT

To achieve a better balance between the Czech and Slovak Republics, the 5th plan envisages different rates of sector growth in the two regions as follows:

	<u>CSC</u>	<u>SLOVAKIA</u>
Social Product(1)	25%	40%
Industrial Output	27%-29%	55%-57%
Engineering	40%	60%
Chemicals	50%	80%
Consumer goods	25%	50%
Agricultural Output	13%	15%

(Source: Guidelines for the 5th Five-Year-Plan approved by the XIVth Congress of the Czechoslovak Communist Party)

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(1) In both cases as a result of labour productivity

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TABLE 2

CSSR: FIFTH FIVE-YEAR-PLAN - MAIN DATA

		<u>1970</u>	<u>1975</u>
Industrial production (1948 = 100)		666	892-905
of which			
chemicals (%)		7.1	8.5
engineering (%)		28.9	31.1
<u>Output:</u>			
electricity	milliard Kwh	45.1	62-63
coal	million tons	28	28
lignite	" "	78	88
steel	" "	11.4	14
rolled metals	" "	7.9	7.9
tubes	" "	1.1	1.3-1.4
tractors	thousand units	18.4	35
cars	" "	142.8	not given
lorries	" "	24.4	not given
machine tools	" "	85	125
cement	million tons	7	8.5
synthetic fibres	" "	30	60
refined oil	" "	9.5	17-18
plastics	thousand tons	245	500
tyres	million units	2.5	4.2
paper and cardboard	thousand tons	825	1,200
cellulose	" "	not given	735
<u>Agricultural output</u>			
total output	milliard crowns	320.3	363.7
cereal output	million tons	34.9	41-42
slaughter animals	thousand tons	5,116	4,926
poultry	" "	385	634
milk	milliard litres	17	20.8
eggs	milliard units	8.5	10.1
investments	milliard crowns	43.2	52.2



TABLE 2 (continued)

<u>Wages and incomes</u>		<u>1970</u>	<u>1975</u>
average monthly wage	crowns	1,938	2,380
wage fund	milliard crowns	148.2	178.2
retail trade	" "	163	210.3
car sales	units	79,904	120,000
building material	milliard crowns	4,689	7,033
meat per head of population	kg	72	78
homes per year	units	87,840	100,000
gross National Income (excluding services)	will increase by 400 milliard Kcs to 1,800 milliard Kcs		
<u>Foreign trade:</u>			
		<u>1948</u>	<u>1970</u>
total		100	522
socialist countries		100	921.2
capitalist countries		100	259.4
socialist countries' share in the total		39.7%	70%
			73.6%

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TABLE 3

INVESTMENT BY SECTOR  
(Fixed and Working Capital)

(Kcs millions, prices as of 1.1.67)

	1967	1968	1969	1970	1971	1972
Industry	28,346	27,369	31,815	33,565	35,110	36,133
Building trade	2,355	2,841	3,045	3,233	3,292	3,873
Agriculture and Forestry	7,729	9,818	9,954	9,449	10,005	10,936
Forestry alone	476	738	678	636	722	757
Transport and Telecommunications	10,427	12,402	12,491	10,947	12,915	14,919
Trade and catering	1,828	2,561	2,830	3,111	2,923	2,923
Science and research development	936	1,166	1,417	1,135	1,133	1,244
Housing and maintenance	9,527	10,432	12,161	15,835	16,556	17,981
Public health & social welfare	1,196	1,369	1,545	1,856	1,858	1,860
Teaching, culture	3,015	2,965	3,241	3,534	4,064	4,823
Mass education & physical culture	3,015	2,965	3,241	3,534		
Investment growth 1948 = 100	578	625	685	725	766	833
for building	486	522	564	581	630	700
(machinery & equipment)	856	935	1,054	1,133	1,179	1,237

(Source: Federal Statistics Institute  
STATISTICKA ROCENKA 1973)

TABLE 4  
GROWTH IN POPULATION

YEAR	POPULATION (in thousands)	BIRTH RATE per thousand	DEATH RATE per thousand	INCREASE per thousand
1950	12,389	23.3%	11.5%	11.8%
1955	13,093	20.3%	9.6%	10.7%
1960	13,654	15.9%	9.2%	6.7%
1965	14,159	16.4%	10.0%	6.4%
1970	14,444	15.9%	11.6%	4.3%
1972	14,526	17.3%	11.1%	6.3%
<u>Fore-</u> <u>casts</u>				
1975	14,780	16.3%	11.6%	4.7%
1980	15,100	15.6%	12.0%	3.6%
1985	15,340	14.5%	12.1%	2.4%
1990	15,520	14.0%	11.7%	2.3%


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TABLE 5

GRAIN PRODUCTION  
(in thousand tons)

	1938	1970	1971	1972	1973	$\frac{1973}{1970}$
Cereals of which:	5,308	7,204	8,780	8,872	9,791	135.9
Wheat	1,457	3,174	3,878	4,016	4,655	146.7
Corn	236	513	524	641	715	139.4

PER-HECTARE YIELDS  
(in quintals)

	1934- 1938 Average	1970	1971	1972	1973	$\frac{1973}{1970}$
Wheat	17.1	19.5	35.3	33.7	37.7	127.8
Rye	16.0	20.7	26.4	27.3	30.6	147.8
Barley	17.0	28.4	33.6	31.2	34.0	119.7
Oats	16.2	20.7	26.5	22.8	27.3	131.9

TABLE 6

MEAT PRODUCTION  
(in 1,000 tons)

	1936	1970	1971	1972	1973(1)	$\frac{1973}{1970}$
Total (ex- cluding poultry)	639.7	1,248.7	1,321.3	1,384.9	1,436.5	115.0
Of which:						
Cattle	328.7	505.5	534.1	552.2	585.0	115.7
Pigs	248.2	680.7	729.3	785.0	800.0	117.5
Poultry for consumption	45.0	159.0	166.5	177.7	192.0	120.8

(1) Estimated

TABLE 7

TRADE BALANCE  
(in thousand Kcs)

		1971	1972	1973
Total		+ 1,225	+ 1,676	+ 997
Of which:	Socialist Countries	+ 1,039	+ 1,568	+ 815
	Of which: COMECON	+ 869	+ 1,465	+ 537
	Others	+ 170	+ 103	+ 278
	Capitalist Countries	+ 186	+ 108	+ 182
	Of which: Advanced	- 1,052	- 809	- 669
	Developing	+ 1,238	+ 917	+ 851

Sources: Statisticka Rocenka CSSR 1973, and calculation on the basis of figures published in Statisticke Prehledy No. 3 March 1974.

TABLE 8

FOREIGN TRADE TURNOVER  
(in thousand Kcs)

		1971	1972	1973
Total		58,965	63,500	72,607
Of which:	Socialist Countries	41,181	45,280	49,587
	Of which: COMECON	37,871	42,145	46,519
	Others	3,310	3,135	3,068
	Capitalist Countries	17,784	18,220	23,020
	Of which: Advanced	13,240	13,565	17,497
	Developing	4,544	4,655	5,523

Sources: Statisticka Rocenka CSSR 1973 and Statisticke Prehledy No.3, March 1974.

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TABLE 9

TURNOVER INCREASE  
(in per cent compared with previous year)

		<u>1971</u> 1970	<u>1972</u> 1971	<u>1973</u> 1972
Total		9.38	7.69	14.34
Of which:	Socialist Countries	9.09	9.95	9.51
	Of which: COMECON	9.35	11.29	10.38
	Others	6.23	- 5.29	- 2.14
	Capitalist Countries	10.05	2.45	26.34
	Of which: Advanced	9.70	2.45	28.99
	Developing	11.07	2.44	18.65

Source: Calculated on the basis of figures published in Statisticka Rocenka CSSR 1973 and Statisticke Prehledy No. 3, March 1974.

TABLE 10

CZECHOSLOVAK IMPORTS AND EXPORTS  
(in thousand Kcs)

		1971		1972		1973	
		Imports	Exports	Imports	Exports	Imports	Exports
Total		28,870	30,095	30,912	32,588	35,805	36,802
Of which:	Socialist Countries	20,071	21,110	21,856	23,424	24,386	25,201
	Of which: COMECON	18,501	19,370	20,340	21,805	22,991	23,528
	Others	1,570	1,740	1,516	1,619	1,395	1,673
	Capitalist Countries	8,799	8,985	9,056	9,164	11,419	11,601
	Of which: Advanced	7,146	6,094	7,187	6,378	9,083	8,414
	Developing	1,653	2,891	1,869	2,786	2,336	3,187

Sources: Statisticka Rocenka CSSR 1973 and Statisticke Prehledy No. 3, March 1974.

TABLE 11

INCREASES IN IMPORTS AND EXPORTS  
(in per cent compared with previous year)

	Imports			Exports		
	<u>1971</u> <u>1970</u>	<u>1972</u> <u>1971</u>	<u>1973</u> <u>1972</u>	<u>1971</u> <u>1970</u>	<u>1972</u> <u>1971</u>	<u>1973</u> <u>1972</u>
Total	8.51	7.07	15.82	10.22	8.28	12.93
Of which: Socialist Countries	8.72	8.89	11.57	9.45	10.96	7.59
Of which: COMECON	9.00	9.94	13.03	9.68	12.57	7.90
Others	5.44	-3.44	-7.92	6.95	-6.95	3.34
Capitalist Countries	8.06	2.92	26.09	12.07	1.99	26.59
Of which: Advanced	9.70	0.57	26.38	9.70	4.66	31.92
Developing	1.47	13.07	24.99	17.42	-3.63	14.39

Source: Calculated on the basis of figures published in Statisticka Rocenka CSSR 1973 and Statisticke Prehledy No. 3, March 1974

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TABLE 12

FOREIGN TRADE WITH INDIVIDUAL COUNTRIES IN 1973  
(in million Kcs)

Rank	Country	Total Turnover	Imports	Exports	Balance
1	USSR	21,963	10,738	11,225	+ 487
2	GDR	8,560	4,550	4,010	- 540
3	Poland	6,529	2,911	3,618	+ 707
4	FRG	4,291	2,101	2,190	+ 89
5	Hungary	4,097	2,171	1,923	- 248
6	Rumania	2,464	1,291	1,173	- 118
7	Yugoslavia	2,331	1,073	1,258	+ 185
8	Bulgaria	1,904	803	1,101	+ 298
9	Austria	1,803	969	834	- 135
10	United Kingdom	1,707	810	897	+ 87
11	Italy	1,400	593	807	+ 214
12	Switzerland(1)				
13	United States	1,029	788	241	- 547
14	Netherlands	1,024	558	466	- 92
15	France	916	430	486	+ 56
16	Egypt	857	423	434	+ 11
17	India	717	402	315	- 87
18	Sweden	585	323	262	- 61
19	Cuba	554	290	264	- 26
20	Belgium and Luxemburg	507	227	280	+ 53
21	China(2)				
22	Japan	432	284	148	- 136
23	Brazil	383	265	118	- 147
24	Denmark	369	158	211	+ 53
25	Canada	367	94	273	+ 179

- (1) Figures not yet available; in 1972 Switzerland ranked 11th but owing to a considerable increase in Czechoslovak-Italian trade a drop to 12th place appears possible.
- (2) Figures not yet available; in 1972 China ranked 21st with a turnover of 376 million Kcs; an 11 per cent increase was planned for 1973.



TABLE 13

CZECHOSLOVAK TRADE IN ARMAMENTS(1)

In millions of \$ US

Year	Exports	Imports
1961	43	79
1962	58	82
1963	70	84
1964	127	137
1965	161	123
1966	172	100
1967	200	96
1968	77	82
1969	109	82
1970	109	82
1971	122(2)	82
Total	1,248	1,029

Distribution according to country: (1961-1971)

Exports: COMECON 798 (USSR 760, Poland 38)

Developing countries: 450  
(India 113; Indonesia 89; Egypt 75; Iraq 70; Syria 44,  
Morocco 20; Libya 10; Afghanistan 7; Nigeria 5; Uganda 4;  
Ghana 4; Yugoslavia 4; Latin America 2; Cuba 2; Cyprus 1;  
Sudan 1; Yemen 1)

Imports: USSR 974  
Poland 55

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(1) Source: US Arms Control and Disarmament Agency,  
January 1973: An interim report to Congress  
(2) i.e. 2.4% of total Czechoslovak exports

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