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WR. 4/16.

General Survey

Coal

The average daily production of the Limburg mines in 1946 rose from 24.000 tons in January to 31.000 tons in December. The highest daily production since the liberation was reached on 29th November with an output of more than 35.000 tons. The total production of coal during 1946 amounted to 6.700.000 tons. Of these nearly 6.300.000 tons were for domestic consumption, while about 400.000 tons were exported.

During 1946 a total of about 1.481.000 tons of anthracite were imported from America and nearly 1.431.000 tons from Germany. In addition just over 20.000 tons of anthracite were imported from England and 250 tons from Belgium.

It is the aim to raise the coal production of the Limburg mines to 12 million tons per year. For this purpose a drive has been organised to recruit more young miners. Last year about 1.000 young Dutchmen were recruited during such a drive and they produce now about 2.000 tons of coal per day. 8.000 to 9.000 more are required to bring the production up to the level which is necessary to keep the country reasonably well supplied with coal for domestic consumption and industrial purposes.

Owing to the three periods of severe frost, which blocked all inland water traffic, the distribution of coal throughout the country has been very badly hampered. In addition to the restrictions mentioned in the "Monthly Report" for December several towns have cut down their tram services and street-lighting. Appeals have been made to the public and industries to be as careful with gas, electricity and water as possible. Deliveries of household coal have been slowed down. It is hoped however to distribute a final allocation for heating in the middle of February. Owing to the severe cold and the deterioration of conditions in Germany the supply of electric current from Germany to Holland has been stopped for the time being. The delivery of coal from Germany is also likely to be discontinued.

Food

The strikes in America have had fairly severe repercussions. As a result the flour will become darker and bakers have been forbidden to sift it

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in order to produce a certain amount of whiter flour for making rolls etc., for which there is a public demand. As rolls are more expensive, it would mean that the bread for the poorer people, who cannot afford rolls, would be less nourishing than if the whole meal flour is used. At the time of the liberation S.H.A.E.F. sent great quantities of American ready made soups to Holland. Now that the food situation has so much improved, these soups are no longer required and the surplus has been sold to the British Ministry of Food for the British Zone in Germany.

Clothing

One of the most serious shortages in the Netherlands is clothing. To provide every male person of more than 1 year of age with one suit and one coat and every female person of more than 1 year of age with one dress and one coat some 61 million square meters of material is required. The yearly production of the total Dutch textile industry at present only amounts to 24 million square meters. Part of this production is used for industrial purposes. Only a very small percentage is exported, i.e. woollen materials 5 %, cotton materials 8 % and rayons 10 %. In addition to this ready made clothes are exported to a maximum of 10 %. This is being done not only because of the need to acquire foreign currency, but chiefly to establish and maintain foreign trade relations.

Oil

A certain amount of oil has been found in a district near Bentheim on the German frontier. The area is partly in Holland and partly in Germany. The exploitation on the German side of the frontier has not yet reached the level of production of the Dutch oil wells, which is gradually increasing and amounts now to over 10.000 tons per month. The Dutch plans for a revision of the Dutch-German frontier have taken into account the adjoining German oil fields, which would probably under more intensive exploitation become quite a considerable asset to the Dutch economy.

Agriculture

There is a serious shortage of potassium fertilizers in the Netherlands, as the country has had to rely entirely on imports. Recently an agreement was signed with the French authorities for the purchase of 58.300 tons of potassium in France and of 81.500 tons from Germany. An earlier agreement with France covered 25.000 tons, which were to be delivered before 1947.

Of these 24,000 tons have already been supplied. The remaining quantities will be delivered between 1st January and 1st July 1947, but of these a considerable proportion will however be too late for the harvest of 1947. Other purchases have been made in Poland and in Spain, but these also will not be available in time to benefit the harvest of 1947.

The position is much better as regards phosphate fertilisers, as the Netherlands themselves have an important superphosphate industry, which before the war produced not only sufficient for home consumption, but very large quantities for export. Fortunately these industries have not suffered serious war damage.

Housing

In order to stimulate the building industry the Ministry of Public Works and Reconstruction has authorised certain special measures. Through these the State will pay the rent on the difference between the cost of building and the profit made during 10 years. The cost of building has increased considerably and private builders and building societies are reluctant to expand their activities without State assistance. The Government subsidy is paid only for buildings not larger than 500 cubic meters. It is hoped by these means to induce private enterprise to start building. So far only the Municipalities and the State have been active in this line.

A second consignment of glass, collected during a drive in Amsterdam, has arrived in Zeeland. It consists of 30,000 square meters of glass and is destined for Middelburg, Flushing and other villages.

Trade

From January 20th - 26th discussions took place in The Hague between Dutch, English and American trade delegates. The results of those discussions did not quite come up to expectations, but some agreements have been concluded. The principal one is an agreement on payments, which provides for guilder accounts which each quarter will be paid according to the wish of the creditor either in dollars or in sterling. Further agreements were signed for the purchase by the Netherlands of certain German goods to the value of 875,000 dollars. They include dyes and other articles of which there is a shortage in the Netherlands. Arrangements have also been made for Dutch and German business men to

make contacts with regard to the exchange of semi-finished goods for finishing treatment in the two countries. Points on which no agreement was reached, were the export of vegetables from Holland to Germany, which the occupying powers were disinclined to restart, as the economic position of Germany is not such as to permit the expense of purchasing fresh vegetables. - The second point was that the harbours of Rotterdam and Antwerp should be used for imports into Germany. The British and American delegates were sympathetic to the Dutch views, but pointed out that the shortage of foreign currency forced them to use German harbours exclusively for imports into Germany. The Dutch authorities however declare: "We will continue to fight for the rights of Rotterdam, which without the German "Hinterland" cannot recover".

National Tracing Bureau

On December 15th the Ministry of Social Affairs at last succeeded in uniting all the different tracing bureaux which were working independently in Holland, into one National Tracing Bureau. The tracing bureaux included are the Office for Winding Up Concentration Camps (Afwikkelingsbureau Concentratiekampen), the Offices for Tracing of Jewish Persons (Bureaux Opsporing Joodse Personen) in Amsterdam and at Westerbork and the Section Tracing of Ex-Political Prisoners of the Foundation 1940 - 1945 (Stichting 1940 - 1945). They will now all be absorbed into the Tracing Bureau of the Netherlands Red Cross.

Price-Reductions in Holland

In accordance with the recent statement made by the Dutch Government concerning wages and prices, all trade-margins have been thoroughly revised in order to arrive at a reduction of prices for various articles.

The margins for textile products have been reduced, for the wholesale as well as for the retail dealers, to enable them to lower prices by $\pm 10\%$, i.e. provided that international prices of raw materials do not rise in the meantime.

Prices of metal household utensils have been reduced by 10 to 12 %, i.e. as far as articles are concerned which are of primary interest for domestic use.

Prices of electro-technical household utensils have been lowered by

about 9 %. Prices of lamp shades have been reduced by 15 %, just as those of vacuum-cleaners and wooden kitchen utensils.

As to glass and earthen ware, only those articles classed in a utility system have been subjected to price-reductions. These articles, including the principal articles for daily use, have undergone a rather important reduction.

For some galvanised household utensils as well as for so-called "wire articles" prices have been lowered by about 10 %.

Margins on shoes and furniture had already been reduced considerably; for shoes this reduction amounted to 7 % and for furniture 8½ %.

Further possibilities of revising profit margins as well as the rates of different kinds of services are being considered.

Unemployment and
Provision of
Additional Work

	1945		1946	
	June 30th	Dec. 31st	Oct. 31st	Nov. 30th
Wholly unemployed registered	112.622	90.446	37.578	39.041
Persons who received unemployed pay, fully or partly	201.400	43.500	5.200	4.800
Registered D.U.W. (service of additional work) labourers			18.800	22.200

Netherlands Imports
and Exports in
November 1946

Month	Imports		Exports	
	Tons	Million of guilders	Tons	Million of guilders
Monthly average	819.725	-	212.601	-
July 1946	1.055.946	209,9	340.166	64,1
Aug. "	1.337.354	206,9	389.233	60,3
Sept. "	1.194.816	199,3	314.215	91,6
Oct. "	1.131.387	211,2	483.815	109,7
Nov. "	1.091.067	238,6	613.812	125,9

Imports and Exports
during November
1946

Most important items					
Imports			Exports		
Kind of goods	unit	number	Kind of goods	unit	number
slaughter cattle	pieces	2.990	fish, crustaceans and testaceans	millions of	3,5
spinning wool	tons	1.810	cheese	guilders	2,4
spinning cotton	"	2.898	condensed milk	"	3,5
wheat	"	37.411	seed corn and sowing seed	"	1,7
maize	"	5.210	fresh fruit	"	2,7
oats	"	11.465	fruit pulp	"	4,7
copra	"	12.173	fresh vegetables	"	2,5
wheat flower	"	9.804			
iron pyrites	"	8.141			

Imports			Exports		
Kind of goods	unit	number	Kind of goods	unit	number
coal	tons	156.429	edible potatoes	millions	5,8
brown coal	"		seed potatoes	of	15,1
briquettes	"	18.420	flax	guilders	1,5
cement	"	33.389	flowerbulbs, plants	"	5,1
fertilizers	"	68.866	coke /etc.	"	2,4
sheet, bar, structural and	"		fertilizers	"	1,8
hoop iron	"	59.295	pig iron and	"	
raw phosphate	"	26.764	machined iron	"	3,0
petroleum	"	32.974	farinaceous products	"	4,1
gasoline and liquid	"		paints, lacquers,	"	
fuel	"	59.627	varnishes, dyes	"	2,0
petrol	"	38.011	rayon yarns	"	3,1
crude oil	"	62.057	cotton piece goods	"	3,0
wood	"	104.655	other piece goods	"	5,1
ground wood and	"		clothes, gentle-	"	
cellulose	"	12.942	men's outfit and	"	
unprepared hides	"	2.106	millinery	"	2,6
yarns	mill. of	5,8	paper and cardboard	"	3,1
piece goods	guilders	7,8	cocoa and chocolate	"	5,2
clothes and	"		worked tobacco	"	1,1
fancy articles	"	4,7	spirits	"	1,3
passenger cars	pieces	1.227	beer	"	1,0
electro technical	mill. of		wireless articles	"	4,2
apparatus and			electric bulbs	"	2,0
material		5,9	other electro techni-	"	
internal com-	"		cal articles	"	3,6
bustion engines	"	2,1	<u>further:</u>		
metal working	"		preserved		
machinery	"	4,1	vegetables;		
other machinery	"	7,6	fish preserves;		
			cocoa butter;		
			medicines;		
			synthetic		
			perfumery;		
			various chemicals;		
			iron tubes;		
			books and various		
			kinds of tools and ma-		
			chines.		

Production
Indices

Product of industry	Basis = 100	1945		1946			
		May	Dec.	May	Aug.	Oct.	Nov.
<u>Fuel</u>							
Coal	1938	29	45	59	58	72	71
<u>Public utility services</u>							
Electricity	1938	18	106	96	102	136	145
ditto corresponding	"						
month of 1938 = 100	"	21	83	109	115	120	122
Gas	"	16	72	74	78	90	91
ditto corresponding	"						
month of 1938 = 100	"	16	68	73	80	90	96
Water	"	103	113	130	130	128	120
<u>Building materials</u>							
Cement	1938	37	85	95	98	108	96
Roofing tiles	"	2	58	76	77	93	80
Sand-lime bricks	"	—	5	18	22	39	42
Masonry bricks	"	3	33	43	48	70	77
<u>Chemical products</u>							
Benzol products	1938	.	72	86	86	93	
Phosphate fertilizers	"	—	65	95	103	139	105

Product of industry	Basis = 100	1945		1946			
		May	Dec.	May	Aug.	Oct.	Nov.
Coal-tar	1934	.	46	52	56	61	
Coal-tar pitch	"	.	24	33	27	43	
Nitrogenous fertilisers	"	10	34	50	52	57	51
among which ammonian							
sulphate	"	4	6	8	10	9	11
Soap	"	1	25	65	30	27	51
<u>Timber industry</u>							
Doors (all kinds)	1938	.	.	42	30	44	39
among which front doors	"	.	.	41	42	37	24
inner doors	"	.	.	42	30	44	40
Veneer	"	.	.	165	135	201	175
Ply-wood	"	.	.	331	284	395	376
<u>Metal products</u>							
<u>Products of rolling</u>							
mills	1940	-	57	89	67	102	105
Precision tubes	"	3	35	101	92	97	94
Leadon tubes and							
sheet lead	"	2	86	91	97	168	149
Cast iron ware							
(without tubes)	1938	.	44	70	58	88	81
Shapemachines	"	12	58	105	112	124	123
Steel windows and doors	"	.	16	31	48	34	76
Steel furniture	"	.	41	60	156	86	68
Wire-mattresses	"	3	33	87	102	127	133
Stoves for heating and							
cooking and kitchen-							
ranges	"	.	70	95	103	134	138
Plate radiators	"	-	44	32	41	50	50
Gas-meters	"	-	63	29	47	83	80
Pine-plate packing	"	4	49	58	89	120	83
Wrought enamel ware	"	-	49	66	73	169	87
Bicycles	"	2	8	21	24	33	38
Carrier-cycles	"	0.9	10	41	21	40	41
Bicycle-saddles	"	-	39	91	90	133	149
Bodies for motor-buses							
and coaches	"	.	8	67	95	138	
Trailers	"	.	103	243	269	285	359
Nails and wire-nails	"	22	36	73	68	125	
Barbed wire	"	17	-	71	65	128	
Rivets	"	-	15	35	34	64	55
Bolts and nuts	"	20	78	81	67	107	
<u>Rubber working industry</u>							
whole branch of industry	1938	.	47	80	104	157	
among which: bicycle							
tyres	"	.	29	47	55	102	
among which: inner							
tubes	"	.	26	79	91	155	
<u>Shoes, clogs</u>							
Shoes, boots, slippers	1938	.	57	77	.	97	
Clogs	"	.	39	51	49		
<u>Textile industry</u>							
Cotton spinning mills	1938	1	27	46	48	56	61
Cotton and linen weaving							
mills	"	1	21	38	43	50	51
Hosiery industry	"	8	36	57	51	70	68
Stockings and socks	"	7	41	73	82	92	91

Netherlands Imports
in December 1946

According to the provisional figures stated by the Central Bureau of Statistics imports in December amounted to 1.022.328 tons (against 1.091.066 in November 1946) to the value of 222,9 million guilders (against 238,6 million guilders in November 1946).

The December imports include:

Iron (raw and semi manufactured)	to the value of 17,7 million guilders.
Wheat	" " " " 12,2 " "
Motor vehicles and parts	" " " " 11,7 " "
Timber	" " " " 9,4 " "
Raw cotton	" " " " 7,1 " "
Cocoa beans	" " " " 5,5 " "
Woollen yarns	" " " " 5,2 " "
Raw wool	" " " " 4,4 " "
Vegetable oils	" " " " 4,3 " "
Coal, coke and briquettes	" " " " 4,1 " "

As is known, several agricultural products, coal and other commodities can only be stated as yet at import values that are less than their real values.

Netherlands Exports
in December 1946

According to the provisional figures stated by the Central Bureau of Statistics exports in December amounted to 503.876 metric tons (as against 613.812 tons in November) to the value of 128.000.000 guilders (as compared with 126.000.000 guilders in November).

The export figure for December includes:

24,6 million guilders' worth of potatoes	
6,5 million	" " " cocoa powder and chocolate
6,1 million	" " " wireless articles
5,6 million	" " " cotton and cotton piece goods
5,2 million	" " " fresh, frozen and tinned vegetables
4,6 million	" " " rayon yarns
2,9 million	" " " seeds of all kinds
2,7 million	" " " condensed milk
2,2 million	" " " potato flour
1,8 million	" " " flower bulbs

The Netherlands'
Economic Relations
with Foreign
Countries

Trade agreements with various countries.

The Netherlands Government has concluded trade and payments agreements with various countries, which, however, regulate the commercial traffic between the Netherlands and foreign countries for a short period. A survey of these trade and payments agreements follows here:

Belgium

On May 24th 1946 a trade agreement was concluded between the Netherlands and Belgium, regulating the commercial traffic between the two countries for the period from June 1946 till the end of May 1947. The trade agreement provided for mutual supplies to a total value of some 500 million guilders. On September 20th 1946 a supplement to this agreement

was signed, the intensive commercial intercourse between the two countries necessitating extension of the commercial possibilities. Consequently various contingents were increased and a number of new items included, amounting to some 40 million guilders.

France On April 26th 1946 a trade agreement was concluded between the Netherlands and France. The imports from France were estimated at 166 million guilders and the exports from the Netherlands at 128 million guilders. Mutually a monetary credit of 40 million guilders - or the corresponding amount in French francs - was granted. This agreement covered the period from April 1st till December 31st 1946. In October 1946 the commercial intercourse between the two countries was extended by means of increased and supplementary contingents. In addition an arrangement concerning some financial issues was agreed on. The agreement mentioned above followed a payments agreement concluded on April 8th 1946. About February regulations concerning the goods-traffic between the Netherlands and France for 1947 will be discussed.

Spain On October 21st 1946 three agreements were concluded between the Netherlands and Spain regulating the goods trade and payments till October 1st 1947. The monetary agreement regulates the normal payments between the Netherlands and Spanish trade in the usual way. The manipulation credit was fixed at $2\frac{1}{2}$ million guilders.

Denmark On March 29th 1946 an agreement was concluded between the Netherlands and Denmark regulating the goods trade for the period from April 1st 1946 till March 31st 1947. Danish exports to the Netherlands for this period are estimated at 29 million guilders and those from the Netherlands to Denmark at 20 million guilders. In view of the extension of the commercial traffic with Denmark an additional accord was concluded on January 2nd 1947 for supplies from Denmark to the Netherlands amounting to 21 million Danish crowns and for Netherlands supplies to Denmark amounting to 9 million Danish crowns.

Portugal On March 1st 1946 the commercial traffic between Portugal and the Netherlands was officially regulated for one year, i.e. till March 1st 1947. To this end firstly a monetary agreement was entered into; in the second place it was agreed to release the mutually blocked balances.

- Norway On March 4th 1946 an agreement concerning the goods-traffic was concluded between the Netherlands and Norway, operating till December 31st 1946. On January 1st 1947 a new agreement became effective, regulating the goods trade for 1947. The total exports are estimated on both sides at 90 million Norwegian crowns.
- Finland A trade agreement was concluded between the Netherlands and Finland for the period from June 1st 1946 till May 31st 1949. The supplies of goods agreed upon will be delivered from June 1st 1946 till June 1st 1947, after which the commercial transactions for the next period will again be estimated. For the first year the mutual supplies will amount to 25 million guilders.
- Sweden As the existing commercial agreement between the Netherlands and Sweden expired on December 31st 1946 a new agreement was made, regulating the goods-traffic for 1947. The mutual supplies and services will represent a value of some 180 million Swedish crowns.
- Germany In December 1946 two arrangements concerning the commercial traffic between the Netherlands and the French zone of occupation of Germany were signed, the one regulating the goods-traffic and the other the settlement of payments.
- Austria In November 1946 a provisional arrangement was concluded between the Netherlands and Austria concerning the commercial intercourse and the settlement of payments, which arrangement may be regarded as a basis for possibly forthcoming extensions. Agreement was reached as to a limited list of goods, amounting to 32 million Austrian shillings or or about 8 million guilders.
- Switzerland As the existing trade agreement between the Netherlands and Switzerland expired on December 31st 1946 a new trade agreement was concluded covering a period of 2 years, by which, however, the goods-traffic is regulated only for the year 1947.
- Yugo-Slavia On August 3rd 1946 a trade and payments agreement was concluded between the Netherlands and Yugo-Slavia. Payments are regulated by a monetary arrangement.
- Italy On August 30th 1946 a trade and payments arrangement between the Netherlands and Italy was signed. Originally the total Dutch exports were estimated at some 25 million guilders, but this amount was recently

increased by including the Netherlands overseas territories and by increasing the existing quotas.

Poland

A trade and payments agreement for the year 1947 was concluded between the Netherlands and Poland. This arrangement, which became effective on January 1st 1947, provides for mutual exports amounting to some 15 million guilders per annum. Apart from the agreements mentioned above an additional protocol was signed, according to which the Netherlands participate in the reconstruction of Poland, more particularly in the field of ship-building, harbours and waterways. This protocol enables Poland to make purchases amounting to 50 million guilders over a period of 3 years, to be settled by means of Polish coal deliveries.

Czecho-Slovakia

On December 20th 1945 a trade and payments agreement was made between the Netherlands and Czecho-Slovakia, which expired on October 20th 1946. In November a new trade and payments agreement was concluded, under which the goods trade and payments were again regulated for one year.

Active trade relations are maintained by the Netherlands with the U.S.A., Great Britain and Canada. No binding arrangements as to the delivery of specific products have been made with these countries. The Netherlands trade with the first two countries is practically entirely in private hands. Probably this will also apply to Canada shortly.

Increase in
Population
January-October
1946

Month	Marriages	Born alive		Deceased	Marriages	Born alive		De- ceased
		Total	of which illegiti- mate			Total of which first births	ed	
<hr/>								
Absolute figures					Per 1000 inhabitants per year			
<hr/>								
Jan.- Oct. 1946	92.347	241.308	6.050	65.643	11,8	30,9	8,3	8,4
1936- 1939	59.041	147.135	2.055	61.759	8,2	20,5	6,0	8,6
<hr/>								
Month	illegitimate births per 1.000 births		mortality one year per 1000 babies born alive		mortality owing to tuberculosis in the respiratory organs per 10.000 inhabitants			
Jan.-Oct. '46	25,4		37,9		3,3			
1936-1939	14,0		37,3		3,3			

Terminations,
Regradings,
Promotions etc.
from the Field

The volume of work in conjunction with terminations, regradings, promotions and salary adjustments to new scales coming in from the Field during the last month has increased considerably and there appears to be a backlog of at least two to three months in their implementation from the Field.

Sea passages
Holland-U.S.A.

The total number of passengers carried since the arrangement was made with the Holland-America Line, to-date is 19 passengers. In addition 6 passengers were transported by air by the K.L.M. service.

D.P. Operations European-
Asiatic Theatres

U.N.R.R.A. Assembly Centre Teams (Netherlands Quota)

The statistics given below show the position as at February 1st
of the recruitment of Dutch Nationals effected through

THE HAGUE HOME STATION OFFICE

Appointments

(incl. recruitment in the Field
and transfers from Paris and
London):

D.P. Operations	744
Other Theatres	31
	<hr/>
	775

Resignations

for Personal Reasons	55
" Domestic Reasons	74
" Dissatisfaction	20
" Health Reasons	15
Miscellaneous	76

Terminations

for Unsatisfactory Performance	5
" Misconduct (incl. Black Market)	21
" Reduction in Force	135
Deaths	3
	<hr/>

Total 419

On active Payroll as at
January 1st 1947 356

Ratios

Resignations for Personal Reasons	7.10 %
" " Domestic Reasons	9.55 %
" " Dissatisfaction	2.58 %
" " Health Reasons	1.94 %
Miscellaneous	9.80 %
Terminations for Unsatisfactory Performance	0.65 %
" " Misconduct	2.71 %
" " Reduction in Force	19.35 %
Deaths	0.38 %

A. de Tschibatchef

A. de Tschibatchef
U.N.R.R.A. Chief Representative to
the Netherlands.

The Hague, 10th February 1947.

M.S.R. 1

A 1 and A 4 NIL.

A 2 and A 3 separate returns submitted to
E.R.O.

B see returns for A 2 and A 3.

C NIL.

D 1 a - j sections: N.A.

D 1 K Personnel of Mission

U.N.R.R.A.

I

NLM 1	Chief of Mission	1 British	Male	Grade 12
NLM 2	Executive Assistant	1 Dutch	Female	Grade 10
NLM 9	Chief Accountant	1 British	Male	Grade 10
NLM 5	Personnel Officer	1 Dutch	Female	Grade 8
NLM 3	Employment Officer	1 Dutch	Female	Grade 6
NLM 4	Administrative Assistant	1 Dutch	Female	Grade 6
NLM 6 12	Secretaries	2 Dutch	Female	Grade 5
NLM 7	Secretary	1 Dutch	Female	Grade 4
NLM 8	Secretary	1 Dutch	Female	Grade 3
NLM 10	Accountant	1 Dutch	Male	Grade 8
NLM 11	Accountant Clerk	1 Dutch	Male	Grade 6
NLM 13	Driver Mechanic	1 Dutch	Male	Grade 5
NLM 14	Mechanic	1 Dutch	Male	Grade 4

A. de Tolihatchef

A. de Tolihatchef,
U.N.R.R.A. Chief Representative to
the Netherlands.

The Hague, 10th February 1947.

(Effective 31st January 1947).