



ECLAC/CLADES - UNESCO/PGI



MEETING OF EXPERTS

**DESIGN OF
A REGIONAL INFORMATION SYSTEM
ON INFORMATION ACTIVITIES**

Report

Santiago, Chile, 10-14 June 1985

E C L A C

Economic Commission for Latin America and the Caribbean

REPORT OF THE MEETING OF EXPERTS ON DESIGN
OF A REGIONAL INFORMATION SYSTEM ON
INFORMATION ACTIVITIES

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I. INTRODUCTION

1. Background information

The present meeting of experts marks the beginning of the final stage in a period of study and consultation within the region with the aim of formulating a regional co-operation programme in the sphere of information, consisting of two projects detected as of priority interest by the national institutions and regional organisms in the course of a survey conducted in 1984 by UNESCO/PGI and ECLAC/CLADES (see Ref. 3, Annex 7), namely:

- The strengthening of national co-ordination mechanisms relating to information activities, and
- A system of Information on information activities.

The meeting was convened expressly to discuss the second project, thus making it necessary to focus attention temporarily on the establishment of an information system. Such a system does not, however, represent an isolated initiative; but, on the contrary, is seen as an instrument of the first project on the strengthening of national co-ordination mechanisms in the sphere of information activities, and consequently not as an end in itself.

The meeting brought together experts attached to regional institutions and organisms who in one way or another have had experience in the design and operation of a similar information system that it is thought might be the subject of a regional project (see Annex 1, List of Participants).

2. Objectives

General objective:

Specific objectives

- To ascertain and examine the opinions and suggestions of national and regional institutions submitted in response to an inquiry concerning a preliminary project proposal.
- To analyse experiences, difficulties and solutions in the establishment and operation of information components that might be of interest for incorporation in the system (registers concerning:

training activities in the development of information specialists, activities of specialists, information research and development projects, institutions engaged in the field of information, etc.).

- To look into options for the logical and operational design of components of the system.

- To study the preliminary operating manuals prepared for these purposes by UNESCO/PGI.

- To identify strategies and contents for inclusion in the regional project proposal.

3. Opening session

Mr. Robert T. Brown, Deputy Executive Secretary for Co-operation and Support Services at ECLAC welcomed the participants and referred to the interest of his organization to include the results of the meeting in a comprehensive regional co-operation framework encompassing the joint activities of national institutions and regional and international organizations engaged in the sphere of information.

Miss Ursula Albertus, Regional Adviser of the General Information Programme of UNESCO, then addressed the meeting. She emphasized the catalyzing role which her institution, acting in conjunction with ECLAC/CLADES, had fulfilled in the context of information in the region by stimulating and welcoming initiatives arising from consensus between the countries concerned. She went on to refer to the preparation, by the UNESCO/PGI unit established in Caracas, of preliminary versions of manuals dealing with the processing of referral information, and pointed out that in so doing the advantages of consensus between the countries and regional organisms had on no occasion been overlooked in the aim of reaching agreement on the application of uniform -or at least compatible- processing procedures likely to be of considerable assistance in information interchanges.

The Director of CLADES, Mr. Claudionor Evangelista, then pointed out the explicit and ever-growing need of governments to avail themselves of information as a basis in the adoption of decisions. The considerable number of information programmes carried out by national institutions and regional and international agencies in pursuit of this objective represented -despite an associated scarcity of resources- conditions conducive to establish

a theoretical and practical framework enabling future action to be undertaken on the basis of consensus in the field of information within the region.

The meeting then proceeded to elect officers for the event and to approve the suggested agenda (see Annex 2).

Through the process of nomination, Mrs. Mónica Allmand of the Consejo Nacional de Investigaciones Científicas y Tecnológicas -CAICYT- of Argentina (Scientific and Technological Information Centre), and Mr. Hugo Cáceres of Instituto Interamericano de Ciencias Agrícolas -IICA (Inter-American Institute for Agricultural Sciences, IIAS) and of Centro Interamericano de Documentación e Información Agrícola -CIDIA- were unanimously elected as general co-ordinator and rapporteur respectively.

II. REFERRAL INFORMATION ACTIVITIES CONCERNING INFORMATION FIELD AND OTHER SECTORS OF DEVELOPMENT IN THE REGION

1. The regional survey and its connotations: Presentation of the basic document

Mr. Julio Cubillo, Regional Advisor of CLADES in Information Matters, defined the basic document for the meeting as an instrument designed to induce critical examination and stimulate the formulation of new ideas. It was hoped that, as a result of its examination, a product of each and all of the experts attending the meeting would emerge and subsequently represent an expression of the national institutions and regional organisms conducting referral information activities.

He mentioned that the beginning of a phase of saturation had been detected in the national institutions and regional organisms as a result of inquiries designed to obtain information for planning purposes and to establish diagnoses of prevailing situations. A degree of impatience had also been observed in a wish to embark on operational actions in the short term with a consequent risk of dispersion and duplication of effort if undertaken without a spirit of co-operation between countries having similar experiences, or without the co-ordinating contribution of the regional information organisms.

This meeting was regarded as the first manifestation of a breaking away from preceding stages in order to embark on joint action in the formulation of a regional co-operation project of benefit to the entire region and to each country and participating regional organism.

He stressed that the information system project under discussion at the meeting was supplementary to the more comprehensive project designed to strengthen the national mechanisms of co-ordination of information activities, and that it should consequently not be thought of as an end in itself.

He added that the document contains items of information that may be grouped in four areas: a) background concerning the idea of a referral system project; b) elements of a basic conceptual framework to define the aim of the project; c) background data concerning the position of the institutions and organisms consulted in connection with this initiative; and d) guidelines for a discussion of aspects that need to be clarified prior to the

preparation of the project proposal for submission to the financial agencies.

With regard to the aim of the project, the speaker believed that the system should be defined more precisely, bearing in mind that its main users, namely the co-ordinating institutions of national information systems, were represented at the event by their corresponding experts.

He reminded his audience that a referral system might well become a mechanism for modelling users' behaviour, accustoming them to the use of information and opening the way to stimulating thought. It should therefore provide intelligent and reliable information for the adoption of decisions. The users of the system may not amount to more than 300 in all in the Latin American and Caribbean region; but those whose role it is to define policies for the development of information systems require to know the specific types of information that a referral information system is able to provide.

He went on to refer to the methodological criteria used in processing the consultation survey, and to its results. From differing points of view, five components had been identified as of primary significance in establishing bases for the development of a referral information system, namely:

- Information research and development projects;
- Information experts;
- Human resources training programmes on information;
- Data banks;
- Specialized documentation on information issues.

He pointed out that the conclusions reached were preliminary in that the quality and value of replies received had depended upon the responding institutions. The institutions and their development sectors should therefore be classified in an endeavour to define the results more closely. Another task requiring attention, he said, was that of cross-checking these replies with the questions corresponding to the referral files, considered within the context of the proposed strengthening of the co-ordination mechanisms of information activities. He went on to say that it was also necessary to ask oneself to what extent this analysis should go on without unduly delaying the formulation of the co-operation programme.

The importance of the countries taking part in the inquiry and the representative character of the institutions consulted,

reinforced the hypothesis that the five components of information identified as priority concerns should be considered a valid -though not exclusive- starting point to set in motion discussions on the definition of a regional system.

He then referred to the final part of the document dealing with criteria for the definition of a regional project.

He suggested that the final criteria for this definition should emerge as a result of consensus among the experts and that those proposed under the headings of "decentralization", "new forms of participation", "co-ordination of the system", "the development of technical means" and "the scope of the project" were merely suggestions based on ideas gathered by UNESCO/PGI and ECLAC/CLADES in the course of the survey.

He also suggested that the spirit in which these or new criteria are drawn up should seek above all to establish the broad scope of the project which, while fulfilling its aims, should not restrict its development.

2. Motions put forward by national institutions and regional organisms

The papers submitted by the participants regarding the experience of national institutions and regional organisms served to clarify the role of the design of an information system within the context of regional realities and specific circumstances. The titles of the papers submitted together with references to related available summaries and documentation are shown in Annex 3. (*)

Referral information activities in some of the countries of the region are shown in summarized form in tables 1 and 2 attached as Annex 4. These show the various activities in progress in relation to each component of the referral system.

A general review of the tables and papers submitted had led to the following conclusions:

1) The national institutions and sectoral information systems in the region carry out, to a greater or lesser extent, various information activities in their own spheres of competence.

(*) The corresponding information and documentation may be obtained from ECLAC/CLADES, Casilla P.O. Box 179-D, Santiago, Chile.

2) In the field of information on information activities as such, a group of institutions of a national and regional character have carried out and currently operate manual or automatized mechanisms for obtaining, analysing, processing and disseminating that information.

3) The design and manner of operation of the mechanisms established in the various countries are based on local concepts or adaptations of other systems. Disparities of a structural and operative nature may therefore be observed among the various systems relating to information activities.

In the course of discussions following the presentation of motions, the experts expressed interest in participating in a referral information system, but pointed out the need for more defined guidelines as to how the system is to be structured and operated. They also mentioned the need to ensure that the design be consistent with the priorities and degrees of development of existing mechanisms.

III. CONCLUSIONS

The analysis of difficulties in the design of the system and of implementation strategies was carried out by two working groups set up bearing in mind the two main lines of concern that had induced the participation of the experts attending the meeting: i.e.:

i) The preparation of manuals for standardizing the treatment and processing of referral information;

ii) The definition of a strategy for the implementation of the system through a project forming part of a regional programme of co-operation in the field of information.

Bearing in mind that both groups were required to base their conclusions and recommendations on a logical and functional design of the system as envisaged (albeit in a preliminary manner), they were provided with a group of analogous questions relating to the topic in hand together with specific inquiries geared to their direct areas of interest. The orientational nature of the questions was emphasized with the view to encouraging the groups to deliberate in complete freedom.

The objectives of the groups and list of questions and their composition are shown in Annex 5. Owing to the methodological freedom applied in the work of the two groups, it did not prove possible to obtain results fully compatible with the questions posed concerning the logical and functional design of the system. However, the range and thoroughness of the discussions held within each group, their mutually supplementary nature, and the general consensus attained at the plenary session with regard to the opinions and suggestions of the groups have made it possible to summarize in this chapter the main conclusions arrived at by the participating experts. These conclusions have been broken down into seven main problem areas, i.e.,:

1. General concept of the system
2. Components of the system
3. Users of the system
4. Information services
5. Technical and standardization aspects
6. Co-ordination of the system
7. Strategy of formulation of a project as part of a regional co-operative information programme.

1. General concept of the system

It was concluded that:

i) A regional Referral Information System on Information Activities is viewed as a mechanism to be consolidated in the long term, its purpose being to support those responsible for the adoption of decisions in the national information co-ordinating institutions and regional and international information organisms.

ii) The system is envisaged primarily as a decentralized one relying on support units -centres of excellence- to be identified in principle among the national information co-ordinating institutions whose installed technical capacity is appropriate for the purpose; or among regional organisms designated by the participating countries in the event that their own institutions have not yet the required level of capability.

iii) The operation of the system will in general be based on the co-operation of national information institutions prepared to contribute their installed capacity and the information they may have compiled in connection with specific component features.

iv) The development of the system is viewed as a gradual process, including a phase characterized by the implementation of pilot projects of national scope with regional implications which, to the extent that they are implemented, will lead to the full operation and efficient service of the system.

2. Components of the system

In this respect it was concluded that:

i) The system will embrace the five component elements identified as of priority interest as a result of the direct inquiries conducted by ECLAC/CLADES and UNESCO/PGI among the national institutions and regional organisms, i.e.,

- research and development projects
- information specialists
- programme of training of human resources involved in the field of information
- data banks
- specialized documentation on information issues.

ii) It was decided to add a sixth component to the above five categories, namely that relating to the institutions operating in

the field of information (despite the fact that this aspect had not been specifically included in the survey), since it was judged that it would merit priority attention since it combines a conjunction of elements and aspects common to the five main components first selected. Furthermore, this additional component is viewed as a nucleus around which it would be possible to integrate the other components.

In addition, the model according to which a referral information system would be structured based on the institutional component, would be more applicable to referral information activities in other sectors of development in that it is precisely this component which exhibits greater progress, regardless of whether its operation is carried out manually or by means of computers.

iii) The components would be integrated through a standardized scheme designed to facilitate the exchange of information between the entities comprising the system. The scheme in question would be based on the preparation of a sole manual concerning the processing of information, the technical characteristics of which were agreed upon at the meeting.

iv) Each national institution and regional organism would be free to establish and maintain the components or categories of information that it may consider necessary according to its own particular interests.

3. Users of the system

It was concluded that:

i) A system of the nature considered on this occasion is not traditional in the Latin American and Caribbean region. In its pilot testing phase, therefore, the system should aim to mold its users, accustoming them to the use of referral information concerning information activities designed to stimulate thought and the implementation of many activities the sphere of information.

ii) The organization of referral information on information activities represents, by definition, a system intended to support the adoption of decisions in and for the field of information. It is therefore advisable to apply the criterion that it will comprise all professional specialists, directive personnel, and researchers etc., responsible for planning, formulating development policies, selecting information techniques, programming activities, and contracting consultants etc., in the field of information.

iii) Subsequent to its trial phase, the system should be technically equipped to attend, in a fluid communicational manner, to all users requiring information available from its component elements recorded at national or regional levels.

4. Information services

It was concluded in this respect that:

Owing to the geographical distances involved and difficulties of communication, it would be advisable to stimulate or reinforce the development of as complete a response capacity as possible, including direct delivery of an information package to the user in order to save him from the trouble of having to seek information on individual specific aspects.

i) The component segments of the system should consequently acquire a minimum information-delivery capacity to attend directly to basic inquiries. Other requests for information should be referred to the corresponding sources.

ii) The referral information service will prove efficacious to the extent that it anticipates events and enables activities to be planned and programmed. Both these aspects of access to information are consequently not only not mutually exclusive but are in fact essential. The study of appropriate technical procedures capable of integrating the component units of the system and enabling rapid communication between them would be the most appropriate way of ensuring its efficacy on the one hand, and, on the other, the acquisition of the necessary equipment by the national and regional information institutions that may have accepted responsibility for supporting and servicing one or other of the component sectors.

iii) As a parallel requirement, the system should establish permanent warning and service mechanisms between its support centres (national and regional centres of excellence) by means of which they may assess their own development. An informative letter in a standard format, or the use of appropriate sections of information bulletins or reviews might be employed for these purposes.

5. Technical and standardization aspects

With regard to standardization of the exchange of information it was concluded that:

i) A sole common manual should govern the processing of referral information in the field of information and other sectors of development throughout the Latin American and Caribbean region.

ii) The manual should be of the nature of a reference document and should facilitate its flexible use depending upon the priority interests of the consulting institutions or organisms.

iii) The manual is envisaged as a modular structure composed of elements of interrelated data.

iv) In the initial stages of preparation of the manual it is suggested that consideration be given to four components in view of their frequent intervention throughout the region, namely: institutions, information units, specialists and projects. In so far as technical methods are concerned, it was suggested that:

i) The technical efficacy of a referral information system with the characterized by the rapidity and dynamism with which it collects, processes and disseminates elements of information contributed by each component segment.

The national institutions that process their information manually should request the necessary financial resources -for example from the UNESCO Participation Programme- to purchase appropriate computation equipment and support media for the expeditious and constant exchange of information.

ii) Technical aspects in the processing and communication of information are essential requirements in a rational information system. Both call for the installation and operation of special equipment that should be carefully selected. A range of optional technical processing combinations should be considered incorporating methods of transmission of information by the most conventional means (postal, telephonic and telex services) as well as by newer methods such as electronic mailing and computer conference.

iii) A study of electronic conference experiences is essential in view of the ease and rapidity of communication that they may provide, at reasonable cost, for service between the centres participating in the system. Such inquiries are judged to be of critical significance in the efficient operation of co-ordination in the system.

6. Project co-ordination mechanisms

In this respect it was concluded that:

i) The most appropriate organizational mechanism of co-ordination of the project may be one consisting of a technical secretariat and a co-ordinating committee in each of the participating countries, where the local offices of regional organisms might also be accommodated. It may also be appropriate to establish a Regional Technical Secretariat on the understanding that this would be a dynamic organism composed of specialists of national institutions and regional organisms who, at a similar level of proficiency, are responsible for planning and supervising activities conducive to the development and full operation of the system within a framework of conventionally adapted standardization.

ii) Both the national and regional secretariats might convoke groups of experts in order to discuss specific problems, thereby rendering unnecessary the formal establishment of a permanent consulting committee of experts. As for their method of mutual communication, an attempt would be made that this be informal and permanent through the medium of the most accessible and low-cost forms of transmission (computer conference), thereby precluding the need for evaluation meetings unless required by the process of development of the system.

7. Strategy of formulation of a project in the context of a regional information programme

Two main periods were distinguished in this respect -that of the preparatory phase of the project, and that of its definition.

The preparatory phase would represent the period between the moment of preparing the present report and the formulation of a draft project of the regional referral information system within the framework of the co-operation programme.

The phase of definition of the project would be the period elapsing between the moment of initiating contacts with national institutions and regional organisms with a view to defining their participation in the project, and the formal submission of the latter to the financing agencies.

A distinction has been made within each phase between technical activities devoted to testing standardized instruments for the exchange of information (a stage designated as of "standardization") and those relating to the formulation of the project.

7.1 Preparatory phase

7.1.1 Testing:

The following activities, which would not be of significant cost to the participating institutions and organisms, are suggested:

i) Trial application of the preliminary version of the manual prepared by Group 1 and continued after the meeting by a team of representatives of UNESCO/PGI and ECLAC/CLADES.

ii) The identification of problem areas in the sphere of information that may call for the preparation of a pilot project at the national level, the implementation of which would facilitate the introduction of the system.

iii) Constant communication between those attending the present meeting concerning national and regional developments relating to the system, either by means of formal or informal contacts.

7.1.2 Formulation of a draft project and promotion of its underlying concept

i) The formulation of a draft project is considered highly desirable as well as its submission to the consideration of the national information co-ordination institutions and regional information organisms in order to obtain their views and incorporate them for the purpose of submission of the final project to the financing agencies.

ii) The experts present on this occasion, consisting of officials of regional organisms and, in particular, of those working with national information co-ordination institutions, should bring to the notice of their colleagues and of the competent authorities in their corresponding countries, the advantages of making available for development in the field of national and regional information, an instrument designed to assist in the planning and programming of information activities.

iii) Use should be made of the most accessible means of communication -whether formal or informal- in compiling comments, opinions, criteria, etc. with regard to the draft project.

7.2 Phase of definition of the project

7.2.1 Forms of participation in the project

It was concluded that:

i) The participation of national institutions and regional organisms in the project would be subject in the first place to their express wish to co-operate in the system, and, in the second, to enlisting their collaboration through the medium of an official undertaking in the form of a letter of intent, aide memoire, co-operation agreement, etc.

ii) The responsibility undertaken by institutions and organisms with regard to activities and services for the system should be established in detail at the time of formalizing their participation, and should aim to obtain an equitable distribution of tasks at centres of similar technical capability. The prevailing criterion should be one of decentralization and of support to the project at centres of excellence prepared to support and service a component of the system.

7.2.2 Submission of the project to financing agencies

It was concluded that:

i) The financing of a project involving the collaboration of a large number of national and regional participants is a complex matter and requires specialized knowledge concerning: the characteristics of the juridical mechanisms on the basis of which the countries request or receive technical aid; and the conditions under which this assistance is received and administered by the country concerned or by the corresponding regional organism.

ii) The preparation of a draft project and its submission to the competent authorities is viewed as a key stage in order to ascertain the feasibility of optional juridical and administrative forms that will affect the financing of the project.

4. RECOMMENDATIONS

The experts put forward recommendations of a general character concerning the process of formulation of a project with a view to establishing a regional information system on information activities as well as specific recommendations in connection with the preparatory phase and that of definition of the project.

1. General recommendations

For: UNESCO/PGI and ECLAC/CLADES

It is suggested that:

1. They continue to act in an intermediary role as a provisional technical secretariat for the formulation of a co-operative regional information programme.
2. That, in this capacity, they disseminate as widely as possible the present report and the basic documentation provided at the meeting so as to stimulate awareness of the significance of these regional initiative among those responsible for adopting decisions.
3. They renew their contacts with other regional and international agencies supplying technical and financial assistance for the implementation of activities in the field of information, with a view to obtaining their active collaboration in the formulation of a regional co-operative programme.

2. Recommendations for the preparatory phase of the project

With regard to standardization in the processing of referral information, it is suggested to UNESCO/PGI that:

4. A preliminary version in Spanish of the Common Manual for the processing of referral information by completed and published, based on the technical suggestions concerning component features and essential data fields put forward at the meeting.

5. A translation of the manual be prepared in English;

And to ECLAC that:

6. The preliminary versions of the manual be published in Spanish and English as a joint production together with UNESCO/PGI.
7. The preliminary versions of the manual in both languages be widely distributed in conjunction with UNESCO/PGI.

For the national institutions and organisms carrying out activities in the sphere of information, that,

8. They include in their work programmes the necessary human resources to carry out a detailed study of the Common Manual and that it be put to test.
9. They submit comments to UNESCO/PGI and ECLAC/CLADES concerning these experiences and keep these institutions permanently informed of developments.

With regard to the formulation of the project it is recommend to:

UNESCO/PGI and ECLAC/CLADES that:

10. They prepare a draft project for the establishment of a system of information on information activities as part of a more comprehensive programme devoted to strengthening national co-ordination mechanisms dealing with information activities based on the conclusions reached at this meeting.
11. They incorporate in the draft project pilot projects of an experimental nature, of moderate cost and duration, among which the following are suggested:
 - a) Identification and classification by type of user of referral information in the field of information.
 - b) A translation into Spanish be made of methodological manuals and documents such as the Thesaurus on Information Sciences prepared by the Brazilian Institute for Information Science and Technology (IBICT).

- c) Experiences in the transmission of data between countries based on national and international telecommunication networks and existing "computer conference" systems, including in these respects the national institutions which have expressed interest in taking part, namely CAICYT of Argentina; IBICT of Brazil; CONACYT of Mexico; IABN, Venezuela; and regional organizations such as ALIDE, CEPIS, ECLAC and UNESCO, among others.
- d) Computerization of manually-kept referral information registers.
- e) The establishment of computerized programmes for the conversion of existing referral information registers.

For national institutions and regional organisms concerned with the field of information, that:

- 12. They promote full discussion concerning the draft project, convoking and consulting the relevant institutions and authorities; and put forward detailed optional proposals for transmission to the provisional technical secretariat.

Recommendations for the definition phase of the project

For: the provisional technical secretariat (UNESCO/PGI, ECLAC/CLADES and other agencies that may wish to participate, that:

- 13. They carry out consultations concerning the draft project among the authorities of national institutions (including countries such as Mexico which may not have participated in the project survey) and competent regional organisms, with a view to obtaining clear participation commitments. It is also suggested that they enter into informal contact with financing agencies in order to detect interest on their part in the proposal.
- 14. They draw up a programme, on the basis of firm commitments enlisted as above, for a definitive version of a proposed regional programme for submission to financing agencies, for which purpose efforts should be made -through the medium of

UNESCO/PGI- to contract the services of a consultant specializing in the design of regional projects using multilateral financial assistance. The terms of reference for this consultancy contract would be drawn up jointly by the provisional technical secretariat and ALIDE.

For national institutions and regional organisms carrying out activities in the sphere of information, that:

15. They organize, with the collaboration of the provisional technical secretariat (and taking into account the offer of COLCIENCIAS of Colombia that its headquarters be used for the purpose), an evaluation meeting at which the fulfilment of the recommendations deriving from this meeting may be explicitly reviewed.

A N N E X E S

Annex 1

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Annex 2

AGENDA

1. Opening ceremony.
2. Results of the regional consultation on the participation of national and regional institutions in the project for the establishment of an information system on information activities in Latin America and the Caribbean.
3. National experiences in the management of information registers which might be useful for the system (institutions, R and D projects, information experts, data bases, information sciences documentation).
4. Experiences of regional bodies in the establishment and operation of registers whose structure is geared to the system.
5. Design of logical and operational components of the system.
 - 5.1 Conceptual model of a system of information registers on information activities.
 - 5.2 Criteria for the design of operational manuals (preliminary version).
 - 5.3 Methodology for studying the handbooks.
 - 5.4 Testing the methodology by examining at least one of the manuals proposed.
6. Formulation, discussion and adoption of conclusions and recommendations.

Annex 3

LIST REPORTS AND DOCUMENTS DISTRIBUTED

- Allmand, Mónica. CAICYT, Argentina
 - (*) "Experiencias en la Compilación de Información y su procesamiento en CAICYT y otras instituciones de la Argentina"
 - (**) Summary of the report.
- Araya, Alberto. CONICYT. Chile
 - "Experiencias sobre los Archivos de Información Referencial de CONICYT"
 - Report delivered orally.
- Beya, Martha. ECLAC/CLADES.
 - "Experiencias con Archivos Referenciales en CLADES."
 - Report delivered orally.
- Bryce, Marta. CEPIS
 - (*) "Experiencias del CEPIS en Registros y Servicios de Información".
 - (**) Summary of the report.
- Cáceres, Hugo. IICA. Trinidad-Tobago
 - "Experiencias sobre Archivos de Información Referencial en IICA".
 - Report delivered orally.
- Ciurlizza, Alejandra. ALIDE. Peru
 - (*) "Establecimiento y desarrollo de una "Red de Información financiera y tecnológica sobre proyectos e inversiones", como un instrumento específico que habrá de ampliar los alcances de la RIALIDE"
 - (**) Summary of the report.
- Frenkel, Paulina. Servicio de Procesamiento de Datos. SCYT/CONICET. Argentina.
 - (*) "Base de datos de recursos en Ciencia y Tecnología"
 - (*) "Identificación de las entidades institucionales y sus dependencias". Nov. 83.

(*) Document available in ECLAC/CLADES

(**) Summary available in ECLAC/CLADES

- (*) "Sistema de Biblioteca. Módulo de consulta: CODCYT".
Document available.
- (**) Summary of the report.
- Garcia, Carmen. UNESCO. Regional Education Office. Chile.
(**) Summary of the report.
- González, Ismael. CONACYT. Mexico.
"El Sistema Nacional de Información Científica y Tecnológica"
de Mexico.
 - (*) "Inventario de instituciones y recursos dedicados a las actividades científicas y tecnológicas en el subsistema de investigación" CONACYT, Mexico, 1984
 - Manual for surveyors
 - Definitions and clasifications
 - Questionnaires for Institutions
 - Questionnaire for Units
 - Data sheet for projects being tested
 - Data sheet for completed projects
 - Data sheet for staff
 - Additional data sheet only for specific and technological information and documentation units.
 - (*) "CONACYT. Department of Information Services. Catálogo Colectivo de Publicaciones Periódicas (CCPP) existentes en las bibliotecas de la República Mexicana". Third edition. Instructivos. November, 1984.
 - (*) "Bancos Nacionales de Información"
 - (**) Summary of the report
- Lampart Bacchus, Sheila.
National Council on Libraries, Archives and Documentation.
NACOLADS. Jamaica.
"The National Council on Libraries, Archives and Documentation".
Report delivered orally.
- Ocampo, Ana Maria. COLCIENCIAS. Colombia
"Experiencias sobre Archivos de Información Referencial"
Report delivered orally.

(*) Document available in ECLAC/CLADES

(**) Summary available in ECLAC/CLADES

- Oyarzún, María. CONICYT. Chile
"Experiencias sobre los Archivos de Información Referencial" en
CONICYT.
Report delivered orally.
- Packer, Abel. BIREME.
"Experiencias sobre Archivos de Información Referencial".
Report delivered orally.
- Parra-Useche, Ramón
"Diseño de un Sistema de Información sobre Actividades de
Información".
(**) Summary of the report.
- Pinheiro, Lena Vania. IBICT. Brazil
"Experiencias sobre Archivos de Información Referencial en IBICT".
(**) Summary of the report.
- Rodríguez, Gabriel. ILET. Chile
"El Programa de Nuevas Tecnologías del ILET".
(**) Summary of the report.

Annex 4

Table IA: INFORMATION ACTIVITIES ENGAGED IN BY PARTICIPATING NATIONAL INSTITUTIONS AND REGISTERS PERTAINING TO THE SYSTEM

PARTICIPATING INSTITUTIONS REGISTERS	INFORMATION PROJECTS REGISTERS	INFORMATION EXPERTS REGISTERS	INSTITUTIONS REGISTERS	DATA BASE REGISTERS
Argentina CONICET/CANCYT	Register on Research projects in literariships vchualic, Argentina, Paraguay, Uruguay	Manual register	Manual register	Manual registers data bases (in Planning Secretariat)
Argentina CONICET/Computer Service	Relational data base on resources in science and technology (Projects components)	Relational data base resources in science and technology (experts component)	Relational data base on resources in science and technology (Institutions components)	-
Brazil CNPQ/IBICT	R and D projects data base (segment of SELAP/CNRS data base)	Data base on experts in information sciences)	Data base on institutions (UNIR)	Data base on data bases (SII) Science and Technology data base (UNIR)
Chile CONICYT	Data base for R and D projects in field of inform. (segment of science and technology projects data base)	Manual register of teachers and advisors in information sciences	-	Manual registers of data bases Manual register on information units
Colombia COLCIENCIAS	Data base on R and D aspects in science and technology	Data base on experts in science and technology	Data base of institutions in science techn.)	Manual register on information units
Jamaica MORILAM	-	-	-	Manual register on information units
Mexico CONACYT	Survey underway on R and D projects in science and technol.	Survey underway on experts in science and technology	Survey underway on institutions in science and Technol.	Survey underway on information in science and Technol.
Venezuela ICM	Data base research in progress in science and technol. (in CONICYT)	Data base on expert (Working List) Multisectoral	Data base on institutions Multisectoral	Manual register on information units (MORILAM)

Table 1B: INFORMATION ACTIVITIES ENGAGED IN BY PARTICIPATING NATIONAL INSTITUTIONS AND REGISTERS PERTAINING TO THE SYSTEM

PARTICIPATING INSTITUTIONS REGISTERS	REGISTER OF SPECIALIZED TRAINING PROGRAMS	REGISTERS OF DOCUMENTATION CONCENTRATING ON INFORM. ACTIVITIES	OTHER NON-BIBLIOGRAPHICAL ARCHIVES	OBSERVATIONS
Argentina CONICET/CAICYT	Manual register	Manual register of published indexing languages	-	
Argentina CONICET/Computer Service	-	-	-	
Brazil CNPQ/IBICT	Manual register	Bibliographical data base in information sciences	Manual register of events relating to information sciences	
Chile CONICYT	Manual register on CONICYT/CENID Training programme	Manual register chilean bibliography in information sciences	Manual register scientific meetings	
Colombia COLCIENCIAS	-	-	Manual register of events relating to science and technology	
Jamaica MACOLABS	-	-	-	
México CONACYT	-	-	Data banks of economic information, patents, legal data	
Venezuela IASN	Manual register of courses (In: Banco del Libro)	Data base in information sciences	Manual register of events (In: Banco del Libro)	

Table 2A: INFORMATION ACTIVITIES ENGAGED IN BY PARTICIPATING REGIONAL BODIES AND REGISTERS PERTAINING TO THE SYSTEM

PARTICIPATING BODIES REGISTERS	INFORMATION PROJECT REGISTERS	INFORMATION EXPERT REGISTERS	INSTITUTIONS REGISTERS	DATA BASE REGISTERS
ALIDE/CEDON	Development projects data base A (being set up)	-	-	Manual register of information units (development banking sector) *
ECLAC/CLADES	Manual registers of environmental projects * Projects on women and development *	ILPES Contact data base in planning *	CLADES Address data base Contact data base	CLADIR data base (information units in economic and social sector) *
IICA/CIDIA	CARIS data base A (Agricultural sector)	Data base of experts (Agricultural sector)	Institutions data base (Agricultural sector)	-
ILET	-	Data base of research workers (New technologies)	-	-
PANU/BIRENE	-	Data of individual (Health sector) *	Data base of institutions (Health sector) *	Manual register of information units (Health sector) *
PANU/CEPIS	Project data base (being set up) (water supply) *	Data base of experts (being set up) (water supply) *	Data base of institutions (being set up) (water supply) *	-
UNESCO/OREALC	-	-	Manual register (Mailing list) (education sector)	-
UNESCO/PBI (Caracas)	-	Manual register (Mailing list)	Manual register (Mailing list)	-

* Register containing information on application sectors differing to the field information and documentation.

Table 2B: INFORMATION ACTIVITIES ENGAGED IN BY PARTICIPATING REGIONAL BODIES AND REGISTERS PERTAINING TO THE SYSTEM

PARTICIPATING BODIES REGISTERS	REGISTER OF TRAINING PROGRAMMES FOR EXPERTS	REGISTER OF DOCUMENTATION IN FIELD OF INFORMATION	OTHERS NON-BIBLIOGRAPHICAL REGISTERS	REMARKS
ALIDE/CEDOM	-	-	-	
ECLAC/CLADES	-	CLADOC data base (being set up)	Thesaurus data base (TESBIB)	
IICA	-	-	-	
ILET	-	Documentary data base, new technologies, information	Data base of software used most frequently in Latin America	
OPS/BIRENE	-	-	-	
OPS/CEPIS	-	-	-	
UNESCO/OREALC	-	-	-	
UNESCO/PSI (Caracas)	-	-	-	

Annex 5

FORMATION OF WORKING GROUPS

WORKING GROUP No. 1

Coo-ordinator: Martha Beya
 Rapporteur: Alberto Araya

- Objectives: 1) To study the logical-functional design of the regional referral system on information activities.
- ii) To consider the preliminary operational manuals prepared by UNESCO/PGI.

Participants

Luis Alba
 Alberto Araya
 Martha Beya
 Marta Bryce
 Hugo Cáceres
 Carlos Fernández-Caballero
 Paulina Frenkel
 Lety Gaete
 Janice Granados
 Sheila Lampart
 Ana María Ocampo
 Abel Packer

Questions in problem areas:A) Logical-functional design of the system

- 1) On the basis of which registers should the system be established -the five registers identified in the consultation or other registers?
- 2) What would be the best strategy for setting up the systems registers in such a way as to accommodate the concerns of all the institutions participating in the group? For example, should work begin with one or more than one register?
 Is it desirable to integrate the registers and make them

compatible? If so, how can this be done given the conditions in the region?

3) What people would the group prefer to be users of the registers selected to initiate the establishment of the referral system?

- the directors of information networks and systems?
- the directors of national institutions for co-ordinating information?
- planners in the information field?
- professionals in their disciplines?

4) What services could the referral system provide through these registers?

- direct access to registers located in reputable national centres?
- orientation by means of a national co-ordinating centre?
- orientation by means of a regional co-ordinating centre?
- selective dissemination on the basis of previously established user profiles?
- provision of general information consisting in current news taken from all the registers in the system

5) What data storage and processing technologies should be used in the system?

6) What communication technologies should be used in the system?

B) Preliminary UNESCO/PGI manuals

7) Which of the manuals now available will be studied?

8) What seems to be the best methodology for studying them? What are the results sought from this examination?

9) What data components do the manuals share?

10) Which of these components should consist in mandatory data and which in optional data for a regional referral system?

11) What methodology seems indicated for improving upon or adapting the available manuals in the future?

12) How and where should manual be published?

- 13) What methodology should be recommended to the participating experts for purposes of encouraging discussion of the manuals when they return to their countries or institutions?
- 14) What other manuals should be developed?

WORKING GROUP No. 2

Co-ordinador: Ramón Parra-Useche
Rapporteur: Carmen García

- Objectives:
- i) To study the logical-functional design of the regional referral system for information activities.
 - ii) To identify strategies and subject contents for inclusion in the regional project proposal.

Participants

Ursula Albertus
Mónica Allmand
Alejandra Ciurlizza
Julio Cubillo
Claudionor Evangelista
Carmen García
Ismael González
María Oyarzún
Ramón Parra-Useche
Lena Ribeiro Pinheiro
Gabriel Rodríguez

Questions in problem areas:A) Logical functional design of the system

- 1) On the basis of which registers should the adoption be established the field registers identified in the consultation or other register?
- 2) What would be the best strategy for setting up the system's registers in such a way as to accommodate the concerns of all the institutions participating in the group? For example, should work begin with one or more than one register? Is it desirable to integrate the registers and make them compatible? If so, how can this be done given the conditions of the region?
- 3) What people would the group prefer to be users of the registers selected to initiate the establishment of the referral system?
 - the directors of information networks and systems?
 - the directors of national institutions for co-ordinating information?
 - planners in the information field?
 - professionals in other disciplines?
- 4) What services could the referral system provide through these registers?
 - direct access to registers located in reputable national centres?
 - orientation by means of a national co-ordinating centre?
 - orientation by means of a regional co-ordinating centre?
 - selective dissemination on the basis of previously established user profiles?
 - provision of general information consisting in current news obtained from all the registers components of the system?
- 5) What data storage and processing technologies should be used in the system?
- 6) What communication technologies should be used in the system?

B) Approach taken and strategy followed in establishing the referral system

- 7) What kind of administrative organization will the referral system have?
- a decentralized administration with a single co-ordinating centre?
 - a decentralized administration with a regional co-ordinating centre for each kind of register?
 - a centralized administration located in a regional centre?
 - national components provided with a network for or the possibility of occasional or informal contacts with national sectoral bodies applying information?
- 8) In view of the broad, multi-institutional nature of co-operation programmes, in which all the institutions will participate as "countries" regardless of their legal character or geographical range,
- What would be the most suitable mechanism for co-ordinating the co-operation project in so far as the referral system is concerned?
- Should there be a technical secretariat? A co-ordinating committee? An advisory committee of experts for taking decisions?
- 9) How can ideas be obtained for pilot projects to enlarge upon the idea of establishing the operational components of the referral system? What project ideas could the group suggest?
- 10) In respect of the promotion and identification of the participants in the referral system components of the co-ordination programme:
- a) How will comments be solicited regarding the proposals for regional co-operation programmes in information (projects 1 and 2)?
 - b) Should informal contacts be established in advance with finance agencies?
 - c) How can national institutions be persuaded to commit themselves officially concerning their practical

- c) How can national institutions be persuaded to commit themselves officially concerning their practical participation in the pilot project components of the co-operation programme?
 - d) How can international bodies (governmental and non-governmental) be persuaded to commit themselves officially concerning their practical participation in the pilot project components of the co-operation programme?
- 11) What activities can be suggested to national co-ordinating agencies and regional agencies in preparation for the project?
 - 12) For what legally acceptable ways might institutions participating in the programme apply jointly for financing to funding agencies?
 - 13) Once financing has been approved, in what ways might the funds be distributed?
 - 14) What mechanisms for preparing budgets and monitoring expenditure are acceptable to the participating institutions?

Annex 6

REGIONAL MANUAL FOR THE PROCESSING OF REFERRAL MATERIAL:
SUGGESTIONS CONCERNING MANDATORY AND OPTIONAL FIELDS

FIELDS FOR THE INSTITUTIONS' COMPONENT

Name of field	Type of information	
	Mandatory	Optional
RECORD STATUS		X
NAME/CONTROL NUMBER		X
NAME OF RECORD		X
NAME OF REGISTER		X
LANGUAGE OF RECORD		X
PARTICIPATING CENTRE		X
NAME OF INSTITUTION	X	
FORMER NAME OF INSTITUTION		X
WORKING LANGUAGE		X
TYPE OF INSTITUTION	X	
GEOGRAPHICAL AREA		X
DISCIPLINE	X	
KEY WORDS	X	
LEGAL STATUS		X
SUMMARY DESCRIPTION OF INSTITUTION		X
HEAD OF INSTITUTION		X
CONTACT		X
DETAILS ON CO-OPERATION		X

FIELDS COVERED BY INFORMATION UNITS COMPONENT

Name of field	Type of information	
	Mandatory	Optional
NAME OF INFORMATION UNIT	X	
TYPE OF INFORMATION UNIT	X	
STAFF	X	
NATIONAL INFORMATION SYSTEM	X	
REGIONAL INFORMATION SYSTEM	X	
INTERNATIONAL INFORMATION SYSTEM	X	
CO-OPERATION AT NATIONAL LEVEL	X	
CO-OPERATION AT REGIONAL LEVEL	X	
CO-OPERATION AT INTERNATIONAL LEVEL	X	
BIBLIOGRAPHICAL COLLECTIONS	X	
SPECIAL MATERIAL	X	
REFERRAL FILES	X	
MAIN SUBJECTS COVERED IN THE COLLECTION	X	
STANDARDS USED	X	
SPECIAL EQUIPMENT AND AUTOMATIZATION	X	
ACCESS TO DATA BASES	X	
DOCUMENTS, OUTPUT		X
SPECIAL SERVICES	X	
STUDIES OF USERS		X
USER TRAINING		X
SERVICE SCHEDULE	X	
METHOD OF PAYMENT FOR SERVICES		X
TRAINING ACTIVITIES	X	
DESCRIPTION OF THE INFORMATION UNIT		X
REMARKS		X
HEAD OF UNIT		X
DOCUMENTALIST IN CHARGE		X

FIELDS COVERED BY COMPONENT ON INFORMATION EXPERTS

Name of field	Type of information	
	Mandatory	Optional
RECORD STATUS		X
NAME OF REGISTER		X
LANGUAGE OF RECORD		X
EXPERT	X	
WORK AFILIATION	X	
PRESENT JOB	X	
TEACHING FUNCTIONS	X	
RESEARCH FUNCTIONS WITHIN INSTITUTE	X	
RESEARCH FUNCTIONS OUTSIDE INSTITUTE	X	
OTHERS FUNCTIONS	X	
PROFESSIONAL ASSOCIATION		X
HOME ADDRESS	X	
NATIONALITY	X	
DATE OF BIRTH	X	
WORKING LANGUAGE	X	
EDUCATIONAL BACKGROUND	X	
DISCIPLINE	X	
KEY WORDS	X	
PRINCIPAL PUBLICATIONS (NO MORE THAN THREE)	X	
REMARKS		X

FIELDS COVERED BY COMPONENT ON INFORMATION AND DOCUMENTATION
PROJECT

Name of field	Type of information	
	Mandatory	Optional
RECORD STATUS		X
NAME/CONTROL NUMBER		X
RECORD NUMBER		X
NAME OF REGISTER		X
LANGUAGE OF RECORD		X
PARTICIPATING CENTRE		X
PROJECT TITLE	X	
TYPE OF PROJECT	X	
DATE OF ONSET	X	
DATE OF COMPLETION	X	
STATUS	X	
EXECUTING AGENCY	X	
EXPERT	X	
GEOGRAPHICAL AREA	X	
DISCIPLINE	X	
KEY WORDS	X	
CP-OPERATING INSTITUTION	X	
PROJECT DOCUMENTATION	X	
FINANCIAL SUPPORT		X
CONTAC	X	
DESCRIPTION		X
REMARKS		X

Annex 7

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