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LATIN AMERICAN INSTITUTE FOR ECONOMIC AND SOCIAL PLANNING (ILPES):  
FUTURE PROSPECTS AND SUMMARY OF ACTIVITIES 1981-1984

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**Instituto Latinoamericano de Planificación Económica y Social**  
NACIONES UNIDAS-CEPAL-PNUD GOBIERNOS DE AMERICA LATINA Y EL CARIBE

**Latin American Institute for Economic and Social Planning**  
UNITED NATIONS-ECLA-UNDP LATIN AMERICAN AND CARIBBEAN GOVERNMENTS

**ILPES**

**Institut Latino-Américain de Planification Economique et Sociale**  
NATIONS UNIES-CEPAL-PNUD GOUVERNEMENTS DE L'AMERIQUE LATINE ET DES CARAIRES

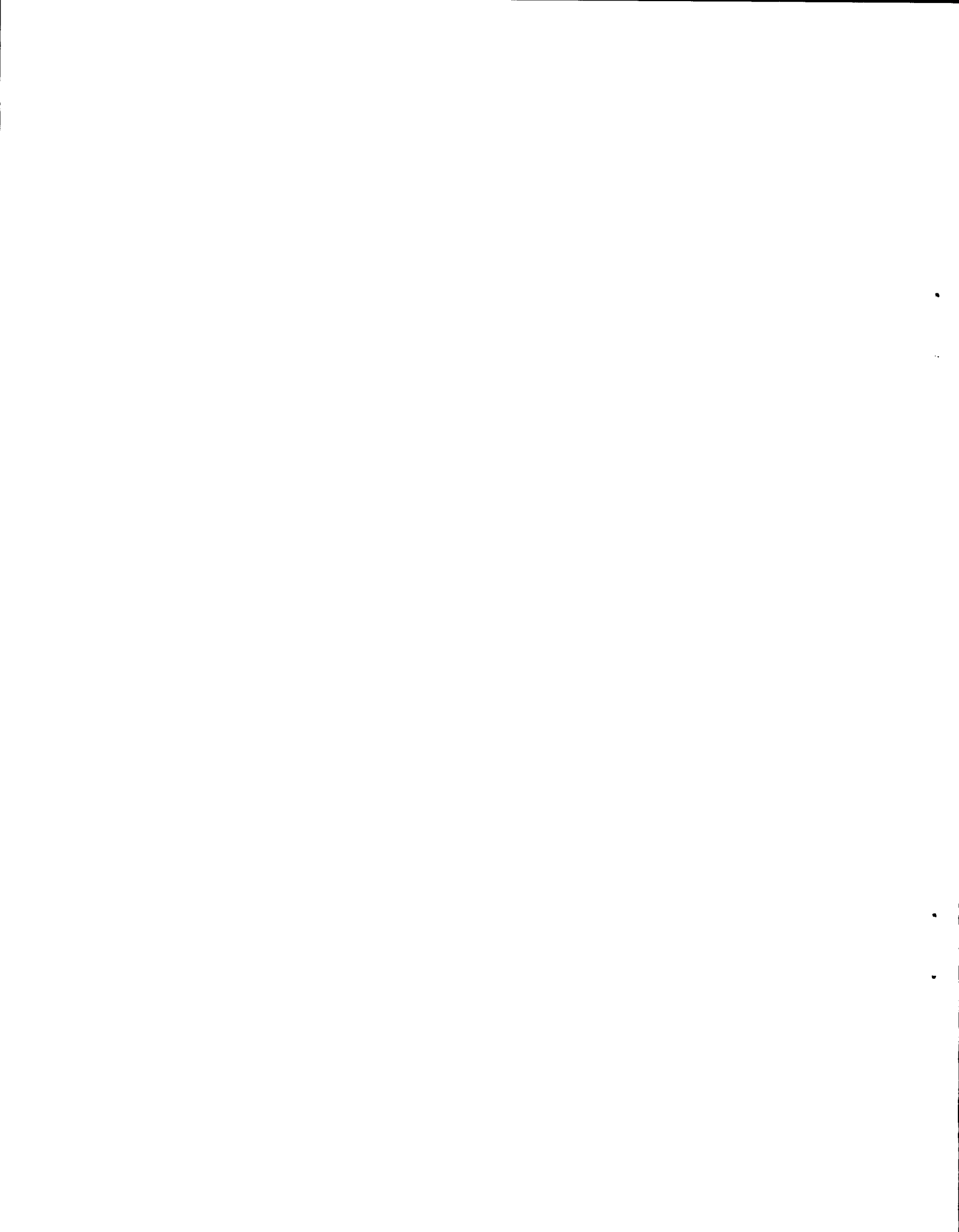
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The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every entry should be supported by a valid receipt or invoice. This ensures transparency and allows for easy verification of the data.

In the second section, the author outlines the various methods used to collect and analyze the data. This includes both primary and secondary data collection techniques. The analysis focuses on identifying trends and patterns over time, which is crucial for making informed decisions.

The third part of the report details the results of the study. It shows that there has been a significant increase in sales volume over the past year, particularly in the online market. This is attributed to several factors, including improved marketing strategies and a user-friendly website interface.

Finally, the document concludes with a series of recommendations for future actions. It suggests that the company should continue to invest in digital marketing and explore new product lines to further expand its market reach. Regular monitoring of key performance indicators is also advised to ensure ongoing success.

## Introduction

The purpose of this report is to present the basic orientation for the development of the future activities of ILPES. This framework for action by ILPES, in a new phase of service to governments, has been the result of a fruitful process of direct participation by the planning organizations of Latin America and the Caribbean which make up ILPES' highest bodies of governmental orientation: the Technical Committee and the Technical Subcommittee.

With regard to future action, the document introduces the bases for the work in the coming years, with special attention to the planning framework, the basic areas of operation and the priority subject-matter nuclei. It next provides a summary of the programme of work for 1984, in which the following basic topics are examined: planning and public policies; the activities of the Administration and general services to member countries; new bases for horizontal co-operation and advisory services, training and research.

Annex 1 summarizes the activities carried out between March 1981 and the first quarter of 1984, and annex 2 contains the bases for new actions by ILPES in the area of horizontal co-operation. Several of the documents presented at the Fourth Conference of Ministers and Heads of Planning, the Fifth Meeting of the Technical Committee and the Sixth Meeting of the Technical Subcommittee were used in preparing this report.

### Background

1. ILPES was conceived as an "autonomous institute for planning economic development" (ECLA resolution 199 (IX) of 13 May 1961) and was created the following year to support countries and areas "within the geographic scope of the Commission" in connection with "the programming of their economic and social development" (ECLA resolution 220 (AC.52) of 6 June 1962). It received support, initially from the United Nations Special Fund and the Inter-American Development Bank and, subsequently, from the United Nations Development Programme (UNDP), through a regional project (ECLA resolution 260 (AC.58) of 11 May 1966). It was conceived and created as an autonomous permanent institute (1961).

2. At the beginning of the second decade of activities, its permanent character was expressly reiterated when ILPES was described as a United Nations agency for providing permanent support services to planning systems in Latin America and the Caribbean (ECLA resolution 319 (XV), of 29 March 1973), a decision which was reiterated the following year (ECLA resolution 340 (AC.66), of 25 January 1974). Subsequently, the System of Co-ordination and Co-operation among Planning Bodies of Latin America and the Caribbean was established and the Conference of Ministers and Heads of Planning of Latin America was set up, it being decided that the Institute should serve as the technical secretariat for the System (ECLA resolution 371 (XVII), of 5 May 1977). Subsequently, the member countries expressed their satisfaction at the initiative taken by ILPES "to co-operate actively with the member governments of the Caribbean Development and Co-operation Committee (CDCC)" (ECLA resolution 397 (XVIII), of 26 April 1979).

3. From the standpoint of the successive projects through which UNDP has provided its decisive support to ILPES, the development of the Institute's activities is divided into seven phases, the last of which began in January 1983 and ends in 1985.

4. The history of the last two decades in Latin America and the Caribbean shows several successful planning experiences. Nevertheless, planning at the national level has been somewhat orthodox as far as procedures are concerned, and fundamentally this has made the process dependent on the existence of a comprehensive and detailed plan for which there are certain requirements and standards. Because this procedure is based on the methods initially used in planning, it had certain characteristics of planning in the centralized economies and of the indicative planning developed in certain Western European countries after the Second World War. These methods did not always produce the desired results in several of the member countries.

5. History itself shows that in some cases, the planning process does not call for global, detailed plans. The definition of strategies for achieving the objectives chosen has often provided an adequate basis for the planning process. There have been cases when national projects have been implemented through relatively coherent economic policy processes without being supported by highly detailed formal plans. Thus, in its new role in Latin America and the Caribbean, the Institute does not insist that planning should be carried out in the same way it was practiced or preached in the past. On the contrary, in view of the different

/experiences tested



experiences tested in the region and its pressing short-term problems, any effort to strengthen the national planning agencies must include a restatement of the conceptual framework and a reformulation of the procedures of planning per se.

6. It is a well-known fact that the recession currently affecting the region has brought its economic and social indicators to levels without precedent in the last fifty years. Consequently, the governments have an increased responsibility in both the economic and the social spheres; the solutions to the crisis -regardless of ideology- will make it necessary, as in the 1930s, to adopt well-thought-out public policies that must be efficiently implemented. The design and execution of those policies are two elements of the new type of planning that must be put into practice in the region during the next few years of this decade. ILPES can once again play a major role by helping to design these policies and serving as a centre for an exchange of experiences among the countries.

7. Consequently, the programme of activities which is proposed concentrates on certain priority subject areas for the region; it incorporates suggestions approved at the Fifth Meeting of the Technical Subcommittee of ILPES (San José, Costa Rica, November 1982), takes into account the recommendations made in the Final Report of the mission which evaluated the Sixth Phase of ILPES (project UNDP/RLA/81/013), submitted to UNDP on 14 February 1983 and gives special consideration to the recommendations of the Fourth Conference of Ministers and Heads of Planning of Latin America and the Caribbean (Buenos Aires, 9 and 10 May 1983), the Fifth Meeting of the Technical Committee of ILPES (Buenos Aires, 10 May 1983) and the Sixth Meeting of the Technical Subcommittee (Mexico, 28 and 29 November 1983).

I. ILPES IN LATIN AMERICA AND THE CARIBBEAN  
DURING THE 1980s

8. Throughout the "twenty-one years" of its existence, ILPES has been the main regional and interregional agency for co-operation in matters pertaining to the planning and co-ordination of economic policy. It has played a decisive role in the conception and consolidation of agencies and systems of planning and economic co-ordination in Latin America and the Caribbean. It has also become the main forum in which the national planning ministries and agencies are able to meet at the multilateral level to discuss the common problems they face in their efforts to achieve economic and social development.

9. As it begins its third decade, the Institute must be sensitive to the most pressing needs of the member countries as regards the planning and national co-ordination of their economic and social policies and must support them pragmatically, both by promoting exchanges of experiences and by proposing new technical alternatives for solving or mitigating the fundamental problems of development. In this regard, the long-term needs -a high and sustained rate of growth, technological progress, generation of sufficient job opportunities, more equitable social and regional distribution of income, guaranteed supply of foods and basic inputs, autonomy in making fundamental decisions on economic policy, and improved regional integration- constitute a frame of reference for all the activities of the Institute. At the same time, the major short-term restrictions -the need to maintain minimum levels of real activity and productive employment, the presence of strong inflationary pressures and the increasing burden of external indebtedness- provide an immediate guideline for orienting the most urgent work carried out by the Institute in co-operation with the member countries.

10. Because there are so many institutional options in these countries and because the governments apply so many different principles of economic policy, the Institute must of necessity carry out its work with a pluralistic approach. To fulfill its original, permanent commitment: strengthening the national planning ministries and agencies, its co-operation work must include a broad spectrum. It must help governments which choose centralized economic decision-making systems to improve their working procedures and must help governments which prefer decision-making systems based on market mechanisms to improve the co-ordination of economic policies. At the same time, the Institute must use its experience and its sensitivity to international problems to help identify matters of common interest to the member countries and promote the search for agreed solutions that will enhance their collective capacity to deal with the adverse world economic situation.

11. All governments have to take immediate policy decisions which have cumulative or delayed effects over the medium or long term. In this regard, it is worth recalling the following conclusion reached by the Committee of High-Level Government Experts (CEGAN) at its sixth session: "In view of the structural nature of the problems, a long-term view must be taken to the solution of the crisis, since the application of short-term criteria has led to a succession of conjunctural crises... During this crisis period, the industrialized economies have been undergoing structural transformations that will significantly alter the international scene

/by the

by the end of this period (the 1980s). Events seem to indicate that a third industrial revolution is underway ... and the region must foresee the consequences of these changes and take them into account in its long-term strategies for transforming production".\*/

12. Each country's development prospects are now more intricately interwoven than ever with the world economy as a whole, the future of which is confusing and uncertain. The adverse dynamics of the service of the external debt throttles opportunities for growth and is reflected in the internal disequilibria expressed as inflation and the stagnation of levels of activity and employment, often accompanied by some destruction of the national productive capacity. At the same time, because of the fast pace at which contemporary history is moving, under the impetus of unprecedented technological changes, a systematic effort must be made to identify trends and outline alternatives so that each country can decide on the best way to reorient its economy in the new international picture that will emerge from the unsettled 1980s. Every country has strong reasons to strengthen its planning system, although, as has been mentioned before, its requirements will indeed be different from those of the past. There is a greater need for adequate articulation of the most diverse economic and social policy tools; there is unanimous recognition of the fact that government intervention in the economy affects all the interdependent bodies involved in the social development process, sometimes promoting greater well-being, other times hindering it. In these years of crisis, the governments will be urged to take compensatory measures to reduce the disparities of income and employment which are aggravated by the recessive trend. At the same time, it is essential to achieve greater intertemporal consistency in decisions associated with such measures.

13. All of this calls for a new rationalization of public activity. As a permanent intergovernmental Institute for Latin America and the Caribbean, the specific task of which is to assist in the planning and programming of economic and social policies, ILPES must study these new rationales, channel them towards practical advisory services to member governments and transmit them in a systematic effort to retrain, update and promote their human resources and help governments to exchange experiences and knowledge. Its main programmes -research, advisory services, training, research and horizontal co-operation- must be guided by these four purposes. The Institute must consolidate its position as an asset of the countries which is capable of efficiently exercising its threefold function: it must be a "laboratory" for joint research with member countries, a "workshop" for performing specific tasks as a counterpart institution to each government, and as a "forum" for the exchange of knowledge which is of regional interest. The Institute must collaborate with the countries of the region in these different ways, providing the support they need to deal with the problems which now challenge them as a result of the international crisis. ILPES must channel this co-operation, giving priority to the relatively less developed countries, particularly those of Central America and the Caribbean, and to the less privileged regions and sectors within the other countries.

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\*/ See Report of the sixth session of the Committee of High-Level Government Experts (CEGAN) (E/CEPAL/G.1260), August 1983.

14. At the same time, the Institute's activities must be guided by the principles of multilateral technical co-operation which are most suited to the region. Its assistance to the countries must help them strengthen their technical and economic complementarity; help them stand more firmly on their own installed capacity and catalyze the exchange of knowledge and experience among them; consider the institutional strengthening of each country as a prerequisite for fruitful co-operation and, when necessary, generate a receptive capacity so that the country concerned may better assimilate the fruits of technical or economic co-operation from other international agencies; contemplate the overall economic and social activity of each country, seeking to make use, whenever necessary, of the potential of private enterprise; consider the role of non-governmental organizations in promoting economic and social development; open up opportunities for bilateral co-operation when it does not mean weakening the possibilities for regional integration; channel co-operation in a pragmatic direction, strengthening economic relations within the region and between the region and the rest of the world; provide for close articulation with the other regional and subregional agencies of Latin America and the Caribbean, and integrate its activities with those of the rest of the United Nations system, thus avoiding duplication with other agencies and programmes. To this end, it is also advisable to discourage any new regional or subregional initiative which might overlap with the areas of specialization of the Institute, thus scattering the increasingly scarce resources of international co-operation in the area. In any event, the Institute must collaborate with the countries in the region in accordance with the consensus mandates it receives from the planning ministries and agencies, bearing in mind the external policy features of each member country.

## II. BASES FOR THE WORK OF THE INSTITUTE IN THE COMING YEARS

15. This chapter discusses the functional framework of the planning ministries and agencies and the medium-term priorities of ILPES.

### A. The functional framework of the planning ministries and agencies

16. The diversification and greater complexity of government functions in the region extends to the responsibilities of the planning ministries and agencies. The multiplicity of functions has not always meant a real strengthening of such agencies; on the contrary, in some countries, in recent years, the aggravation of the economic crisis has meant that priority had to be given to short-term monetary and exchange policies formulated by the public finance ministries and agencies or the central bank authorities. In many cases, however, the change of direction has not meant that planning has been left aside but rather has involved a sharing of responsibilities with the planning agencies. With a knowledge of how the planning ministries and agencies of Latin America and the Caribbean work, it is possible to identify a good number of the functions assigned to them, although they are not distributed evenly from one country to another. For the purpose of this chapter, these functions are regrouped into eight categories.

17. Formulation of plans and policies. This category of function would appear to be the leit-motif in the creation of these agencies. It includes responsibilities pertaining to the conception and implementations of development strategies, the design and preparation of descriptive and prospective models for essential macro-economic variables, the actual formulation of global economic policies and the establishment of guidelines for detailed sectoral policies. In many cases, these national agencies are directly responsible for preparing and implementing the investment budget; in others, they share with the ministry of finance the responsibility of formulating all fiscal policies or preparing the fiscal budget for current expenditures. Sometimes the planning agency is actually responsible for the regionalization of public expenditure, at the same time influencing transfers of national resources to States, departments or provinces and to municipalities, cantons or other subdivisions. The task of formulating plans and policies performed by the planning agencies has led them from the beginning to play a substantive role in the establishment and work of bodies responsible for producing basic statistics in the field of demography, national accounts and other economic and social indicators.

18. Programming activities of the public sector. Traditionally, the national planning agencies have played an important role in the intersectoral articulation of the other ministries; this has often included the formulation of general sectoral guidelines for each one, particularly as regards productive activities (agriculture, mining, industry, etc.), physical infrastructure (transport, communications, energy, water resources or public works, etc.) and social services (education, health, housing, labour, etc.). Some planning agencies have helped the central governments co-ordinate the sectoral ministries; others have also assumed direct responsibility

for studying and implementing administrative reforms of national scope. More recently, several national planning ministries and agencies have begun to perform more explicit duties in connection with the preparation and monitoring of inventories and payrolls of decentralized agencies and enterprises, a task which is particularly important for a mixed economy. During the current decade, some of them are beginning to set up articulated accounts systems which take into consideration this decentralized sector and make it possible to expand the coverage of conventional public accounting.

19. Direct advisory services to the central government. Although the national planning agencies occupy different positions within the administrative structures of the member governments, they frequently perform an important role in providing advisory services to the Executive branch beyond those mentioned in the two preceding paragraphs. These responsibilities include the preparation of special economic and social studies, the preparation or supervision of strategic economic projects of national interest, membership in public bodies responsible for collective deliberations (interministerial councils, fiscal councils of public agencies, decision-making boards concerned with specific public policies, etc.). In some cases -as has often been the case with the Planning Commissariat in France- the national planning agency acts as an intermediary for the government in the formulation of social agreements, playing a role of great political significance in matters pertaining to the claims of professional and producer classes and associations. In addition, the national planning agency often takes part in delegations representing member countries in different international fora.

20. Macroeconomic planning and conjunctural analysis. From the beginning, the national planning agencies have been responsible for following up on plans and policies and monitoring their conformity with economic and social development objectives. Little by little, some of them have also been given responsibility for following up on and monitoring certain nationwide programmes and regional plans and for articulating plans with sectoral projects. More recently, some agencies have assumed responsibility for preparing conjunctural analyses which provide the governments with up-to-date information on the behaviour of the main aggregates of the national economy. In certain cases, to this task is added the actual formulation and implementation of conjunctural policies pertaining to price and rate controls and monetary and exchange controls; in such cases, they work in co-ordination with the ministry of finance. During the current decade, some planning agencies have assumed an important role in the preparation of basic information and direct negotiations with international financial institutions and agencies connected with the handling of the current external accounts crisis.

21. Support to regional development agencies. Some national planning agencies have created internal units to co-ordinate their regional or local development activities and their support to previously created autonomous or decentralized agencies. These tasks have included rationalization of requests made to the central government, representation of regional interests, and, in general, the preparation of strategies, plans and projects for regional development, both at the national level and at specific political-administrative levels. In certain cases, specific regional development funds have been created which are also administered by the planning ministry or agency.

22. Pre-investment and project activities. The national planning agency has usually included project offices having responsibilities both for the drawing up of national parameters to evaluate investments in the area of partial analysis and for the preparation of pre-investment plans and the formulation of projects. Later on, the projects offices and other offices in the planning agencies have assumed responsibility for certain project analyses and for the preparation of reports or opinion -from the point of view of planning- on projects prepared by other ministries. The planning agencies still frequently advise the government in this area. A broader but similar responsibility of the planning agencies is that of establishing scales of priorities for projects which are heterogeneous in nature and which cover several different sectors. Also, responsibilities in the area of pre-investment have led certain agencies to establish national pre-investment policies and to administer specific funds or programmes for the financing of pre-investment projects. In other more limited cases, this responsibility has extended to the setting up of development banks specializing in long-term credits for public and private projects.

23. Science and technology, human resources and technical co-operation. There are planning agencies in Latin America and the Caribbean whose functions include the promotion and creation of institutional capacity in the areas of science and technology and articulating the links between the scientific community, productive enterprises and government. Some also provide training of human resources for the public sector, with emphasis on planning. Finally, partly as an extension of one or both of these subgroups of functions, some planning ministries and agencies are expanding their role by providing orientation and co-ordination of international technical and economic co-operation programmes, as a complement to the role of the ministries for foreign affairs. Some member countries have created a specific institutional capacity in the area of technical co-operation to co-ordinate these tasks.

24. Social development and emergency programmes. The planning ministries and agencies have often organized offices or made technical personnel available specifically for social development programmes. The interdependency of the social and economic spheres, on the one hand, and the multiple interrelations of the social sectors and programmes, on the other, have helped to make these agencies an appropriate area of public administration for exercising this role of integral articulation of government activities in the social field. Partly as a result of these responsibilities and partly because of the role which naturally falls to planning in the co-ordination of public policies, many of the planning agencies have been given responsibility for articulating emergency programmes when some natural disaster causes a breakdown of productive activity and employment, with the resulting direct impact on the living conditions of the population.

25. This brief outline of the current functions of the planning agencies and ministries of Latin America and the Caribbean should make it possible better to appreciate the scope and orientation of the activities of ILPES which are aimed at the technical and institutional strengthening of these agencies. Obviously, this does not mean that all the functions mentioned are always concentrated in the national planning agency or that it is some kind of super-ministry. In actual fact,

/the functions

the functions described must be viewed in relative terms and it must be understood that there are modifications both in space and in time: there are differences between countries and profound changes take place over the years within the same country.

26. In any event, the above description shows the complexity of the activities which must be carried out by an intergovernmental institute such as ILPES if it is to support all the functions of the planning agencies in the region. ILPES does not have the installed capacity to deal with all the areas mentioned. Consequently, it must concentrate on those functions which are most in line with its own past experience, adding only those new activities which are most directly relevant to the co-ordination of economic and social policies. It is worthwhile describing some of the topics which enable the Institute to ensure that its research, training and advisory activities are co-ordinated in the most effective way possible to enhance its collaboration with member governments.

#### B. Basic areas of operation

27. The Institute's areas of specialization are derived from its basic function, i.e., supporting planning offices and ministries in Latin America and the Caribbean. In its twenty-one years of existence, ILPES has concentrated its co-operative efforts with member governments on activities which can, in synthesis, be classified into four areas: economic policy and planning, public sector programming, regional and sectoral planning, and pre-investment and projects.

28. ILPES' ongoing activities in the area of economic policy and planning are one of its fundamental concerns as an institution. For this reason, ILPES has been the only permanent intergovernmental agency designed to support member countries in the programming of economic and social policies. Within the Organization, national agencies and ministries concerned with economic policy and planning have created their own arena for a technical dialogue and for the multilateral development of similar solutions for common problems. ILPES offers support to the member countries in relation to the various aspects of "finalistic" policies - policies defined by their objectives- i.e., development, stability, income distribution, employment and external balance, etc. In like manner, it supports them as regards the major instrumental economic policies: fiscal, monetary, public prices and charges of public services, foreign trade, etc. In both areas it seeks to articulate both the objectives and the instruments of these policies, within a planning framework in keeping with the institutional characteristics of each individual country.

29. As regards public sector planning, the work of ILPES -although primarily directed toward planning offices and ministries- encompasses the entire range of governmental activities. In so far as direct administration, the Institute has worked and plans to continue working in the areas of institutional design, organization, financing, programming and control, etc. Taking into account the increase and diversification of public activities, ILPES is prepared to support member countries emphatically as regards the management of the broad and heterogeneous sphere of decentralized administration. Depending on the institutional characteristics of each country, this will include some public agencies closely linked to direct administration, entities associated with mixed economies, decentralized

/agencies, foundations



agencies, foundations, trusteeships, autonomous institutions, corporations with a majority of public capital, and State companies in general. The co-operation extended to countries includes the design and implementation of unified accounts systems; the integration of those accounts with the principal macroeconomic aggregates (public spending, use of foreign exchange, etc.); financial and material follow-up systems for public projects and the formulation of specific economic policies for central and decentralized governments.

30. In regard to activities of regional and sectoral planning, the tasks of ILPES are divided into two parts. Sectoral planning in general goes beyond its field of specialization, although the Institute can support the governments in so far as the co-ordination of sectors with the development process and the integration of sectoral policies with other economic policies. As regards regional planning, ILPES has developed a noteworthy capacity. With respect to sectoral planning, countries are supported in the formulation of economic policies in three areas: natural resources and the sectors of production (agriculture, industry, services, etc.); physical infrastructure (transport, communications, etc.); and social services (education, health, housing, etc.). As a complementary effort, it is prepared to provide limited services in some specific areas: energy, technology, environment, etc., in conjunction with other United Nations programmes and agencies which co-operate with it. With regard to regional planning, ILPES collaborates with interested governments in the various stages of this planning (analysis, strategy formulation, intra-regional programming, etc.) and in its different settings (intra-national, provincial, microregional, etc.). In particular, it is fully equipped to co-operate with governments in the identification of the spatial effects of other economic and social policies.

31. Lastly, the fourth area of functional concentration of the Institute regards the various specializations associated with pre-investment and projects. ILPES has carried out significant work in both fields and is ready to continue working in this area at the request of member countries; in this regard, attention should be drawn to the significant co-operation which the Institute receives from other United Nations agencies and programmes. It maintains its own capacity in some spheres, especially with regard to certain types of social projects, the role of such projects in the allocation of public resources over a number of years and the physical and financial follow-up of government projects.

#### C. Priority subject-matter nuclei

32. In the years to come, the Institute must avoid scattering its technical resources and must concentrate on those activities which are most important to the region. The various services it provides the member countries, within each of its main functional areas (economic policy and planning, public sector planning, sectoral and regional planning, and pre-investment and projects) and through each of its basic programmes (advisory services, research and training) must converge on a set of priority activities. The overall outcome of this effort must be to enhance the efficiency of ILPES' co-operation with member countries.

33. Following is a description of the four central subjects around which the Institute develops its work in those areas considered most important in the light

of the economic and social development problems with which the region must deal in the 1980s. This frame of reference is not a rigid one but must be adjusted according to the way these problems evolve and the challenges they pose to economic policy and planning. Different emphases must be given to the working priorities depending on the particular circumstances of each country with which the Institute co-operates.

34. Planning and articulation of economic policies. Taking into account the most urgent responsibilities of the national planning systems, ILPES must emphasize those activities pertaining to the co-ordination of public policies which are oriented towards economic and social development. From the temporal standpoint, this means that the Institute must continue to strive for compatibility between short, medium and long-term policies. It also means that it must develop a more global and integrated approach to the allocation of public resources. In this regard, considerable effort must be made to co-ordinate monetary and balance-of-payments policies with fiscal policies and to demonstrate the interdependency among these three policy areas and all other instrumental policies (regarding public rates and prices of public services, wages, etc.). It is essential, therefore, to expand the approach to the allocation of resources to include decentralized administration; the Institute must concentrate more on the different categories of public enterprises and on the formulation of specific policies pertaining to them. At the same time, ILPES must support the member countries with respect to the immediate challenge facing them and with respect to alternative designs and short-term policies, either by using its own technical resources, by mobilizing specialized consultants or working in collaboration with ECLA and other United Nations agencies, or by promoting horizontal co-operation. This will include devising measures to bring about a recovery of production levels and sustained rates of growth of economic activity and employment and studying viable alternatives for financing development which do not increase internal inflationary pressures and do not aggravate the situation with respect to external indebtedness either. This subject matter nucleus refers basically to the first two functional areas of ILPES: planning and economic policy, and public sector planning.

35. The region within the world economy of the near future. The Institute must take into account the changes that are taking place with respect to the insertion of Latin America and the Caribbean into the world economy, the alternatives that are available to the region for redefining its position in this context over the next few years, and the new responsibilities which these changes will involve for the national agencies and ministries responsible for planning and economic policy. ILPES will soon be putting underway, in so far as possible, the necessary supplementary activities to provide member countries with up-to-date and systematic information on the forecasts that are being made of the evolution of the world economy in the near future. On a more continuous basis, it will work together with ECLA on the interpretation of this aspect of the development of the region, using the results of this effort in the services it provides to member countries and, in so far as possible, complementing them with its own regular activity. In this regard, it will pay special attention to the role of sectoral development in the future development of the region. It will also help the member countries identify those activities which can enhance their recovery and provide orientation

/and support

and support for their internal economic and social development processes, as a supplement to the efforts of ECLA. The progress made by the Institute with respect to alternative development strategies and its impact on planning needs are a key element for all activities connected with the external framework.

36. Economic, global and territorial policies. ILPES must continue its work in the area of regional planning and, in particular, improve its knowledge of the interaction between economic policies of national scope and regional development within the member countries. Within this subject matter nucleus, special attention will be paid to the centralization or decentralization of decisions regarding the allocation of public resources to different regions of each country; the linkage between this process and internal political-administrative organization (provinces and States, municipalities and other subdivisions, etc.); an integrated vision of the spatial projections of rural and industrial development; and ecological and environmental matters. As regards the spatial dimension of the development process, ILPES must maintain its position as a leading centre in the region: it has certain relative advantages which enable it to continue collaborating in this regard with the member countries. In particular, it must continue its approach of linking development of the countries' domestic space with social aspects of national development.

37. The role of the State and social development policies. ILPES must continue with its activities pertaining to social development planning and policies, an area in which it has traditionally made significant contributions. It must continue its research on the interdependency between economic and social development and collaborate pragmatically with the member countries in programming public expenditure for the social sectors and for specific activities aimed at reducing critical poverty and improving the level and distribution of well-being. The Institute must also concentrate its attention on five points: the role of the State in the region; the financing of social programmes; the incorporation of the social sectors (education, health, housing, etc.) and other social programmes (employment, community organization, etc.) within the programming of public expenditure; the adjustment of new techniques for formulating and establishing priorities for projects in the social sphere; and the achievement of a "fuller" understanding of the phenomenon of social well-being, with integration of its components of employment, income and consumption. It is quite clear that the Institute's activity in the promotion, formulation and implementation of social development policies is even more relevant and timely at this particular juncture, considering the economic crisis affecting the region. The prolongation and aggravation of the current recession have increased the responsibility of each government for taking compensatory measures; this means that they must explicitly take into account the objective of social equity in every economic policy action, whether it is aimed at stabilizing the current economy, reactivating it, or restoring the dynamics of growth over the medium term. The Institute's expertise in the social field makes it one of the few agencies fitted for providing multilateral aid in this respect within the United Nations system in Latin America and the Caribbean.

### III. PROGRAMME OF WORK FOR 1984

#### Introduction

38. Under its Programme of Work for 1984, ILPES will begin to put underway the New Institutional Project 1984-1986, approved at the Fifth Meeting of the Technical Committee (Buenos Aires, May 1983) and the Sixth Meeting of the Technical Subcommittee (Mexico, November 1983). The New Project consolidates the reformulation of activities initiated by the Institute in mid-1982 and continued in 1983, which was a period of transition.
39. The reformulation of activities, as presented in Buenos Aires, received wide support from the member governments and was welcomed by other international, regional or national agencies with which the Institute collaborates or is considering collaboration. From the beginning, the institutions that have historically had closer links to ILPES have helped in the conception and programming of the innovations introduced. This is particularly true of UNDP, which has supported the Institute since its creation, through the Special Fund for Technical Assistance. It is also true of the Executive Secretariat of the Economic Commission for Latin America, to whose system the Institute belongs, and from which it receives significant collaboration.
40. There is no question that the implementation of the Programme of Work for 1984 will be subject to the availability of human and material resources in the Institute; this question will be dealt with in other documents. Nevertheless, the prospects appear to be good, despite the fact that the current crisis has indirectly affected the Institute because of its effect on the member countries and the main agencies which support it.
41. The Programme of Work for 1984 will, however, be implemented not only through its installed capacity but also through its mobilized capacity, as a result of its ability to bring together or act as a catalyst in the efforts of other international or regional agencies. In this regard, very positive steps were taken in 1983 to create closer contacts between ILPES and other economic or technical co-operation agencies and it is expected that these efforts will be even more fruitful in 1984.
42. The Institute has worked closely on specific tasks or on the study of areas of common interest with many organizations, including the following: the United Nations Development Programme (UNDP), in February and April; the Latin American Energy Organization (OLADE), in March; the Department of Technical Co-operation for Development (DTCO), in April; the United Nations Children's Fund (UNICEF) and the United Nations Educational, Scientific and Cultural Organization (UNESCO), on several occasions; the United Nations Conference on Trade and Development (UNCTAD), in July; the World Bank and the Economic Development Institute (EDI), the Inter-American Development Bank (IDB) and the Organization of American States (OAS), in August; the Pan American Health Organization (PAHO), in August and October; and the Latin American Economic System (SELA), in November. In addition, ILPES participated on the directing councils of the United Nations Research Institute for Social Development (UNRISD) and the United Nations Institute for Training and Research (UNITAR), in July; in December, the International Institute for Educational Planning (IIEP), will also be opening up prospects for joint work of interest to the region.

/43. Finally,

43. Finally, it should be noted that in 1983 the Institute worked to re-establish relations that had been interrupted or to establish new relations with other international or national agencies of great prestige whose work is of special interest for planning in Latin America and the Caribbean. These efforts should greatly contribute towards making the Programme of Work for 1984 viable. In this regard, it is worth noting that official contacts -some still in a preliminary stage- have been made with the Organization for Economic Co-operation and Development (OECD) and the International Institute for Public Administration (IIPA) in Paris, the Commission of the European Communities (CEC) in Brussels, the World Health Organization (WHO) in Geneva, the Latin American Centre for Development Administration (CLAD) in Caracas and the United Nations University (UNU) in Tokyo. In general, the purpose of these contacts is to identify points of common interest and possibilities for co-operation in order to avoid duplication of efforts and enable the region to benefit from the advances that have been made in studies and experiments in member countries or outside the region.

44. Within the ECLA system, the Institute's excellent relations with all the institutions of the system have also enhanced its ability to meet future commitments. The Executive Secretary, the various divisions of the Commission, CELADE, CLADES, and the various specific projects have all been most willing to co-operate with the Institute. All of this augurs well for the implementation of the Programme during 1984.

45. Finally, in 1984 the Institute will continue carrying out internal changes in its working procedures, both administrative and technical. At the same time, it will be important to continue renewing the technical and administrative infrastructure, adding to the computer services inaugurated in 1983 in order to support both administrative services and teaching and technical activities.

46. In the following sections, the activities to be carried out in 1984 have been subdivided into three major groups, i.e., Planning and Public Policies (including economic and social aspects), activities of the administration and general services to member countries, and advisory services, training and research. As has been mentioned, the organization and the functional framework of the Institute are based on three major concepts.\* / This report follows a new outline which allows for a more unified treatment of these concepts.

47. Thus, as regards economic matters, in section A, reference is made to functional areas 1 and 2 (economic policy and planning and public sector programming and management) and to advisory and research services; this allows for a focus on subject-matter nuclei 1 and 2 (articulation of the short, medium and long-term decision-making process and external framework of the economies of the region). This same section deals with social aspects of the Programme of Work and certain elements of functional area 3 (sectoral planning), as well as activities pertaining to subject-matter nucleus 4 (role of the public sector in the next few years, with emphasis on responsibilities in the social sphere). Section D presents a discussion

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\* / See ILPES: Twenty-one years of activity 1962-1983 (E/CEPAL/ILPES/Conf.4/L.2) and ILPES: its role in the region and programme of work for 1983 (E/CEPAL/ILPES/Conf.4/L.3).

of the activities of the training programme, so that both aspects of the question of human resources, i.e., research and training, are dealt with in an approach which includes both of the aforementioned areas: the economic and the social. Section C reiterates the Institute's conception that the new modalities of technical co-operation in the region should be more systematically based on horizontal co-operation efforts.

48. There is an important aspect of the Institute's activity that should be stressed in this subject-matter organization, i.e., planning and regional policies. The Programme of Work for 1984 provides for the Institute's work in this area -in which it is a centre of excellence in the region- in two contexts: on the one hand, in the part referring to socio-economic aspects and, on the other, in the part referring to the training of human resources for development.

#### A. Planning and public policies

49. This heading covers two major groups of activities, i.e., economic planning and policies and social programmes and policies. The first group includes the formal aspects of the process whereby the government intervenes in the economic system, i.e., those which concern planning as such or the co-ordination of public policies. It also covers the substantive process of development, its interpretation and the definition of the basic problems thereof, as well as the requirements that must be met in order to solve development problems.

50. An overall division of work has been instituted in the United Nations regional system in Latin America; thus, ILPES is responsible, fundamentally, for all matters pertaining to planning and ECLA is mainly concerned with tasks pertaining to development. Although this dichotomy is still valid and serves as a guideline for establishing the difference between the mutually complementary work carried out by the Commission and by the Institute, there is, nevertheless, an interdependency between the formal processes (planning and policy-co-ordination) and the substantive processes (actual economic and social development), so that no rigid division can be made. Consequently, both institutions work together in the area of planning and development, bearing in mind the division of functions mentioned at the beginning of this paragraph.

51. With respect to the formal aspects -planning and public policy co-ordination- the Institute's activities in 1984 will be channelled along two separate but interrelated lines, one pertaining to the theoretical aspects of the planning process and the other to the technical aspects.

52. From the theoretical point of view, the Institute must ensure that it remains at the fore of knowledge relating to planning, this being understood to be an inseparable part of the social process of development. Indeed, all planning always involves aspects relating to the rationalization of the activity of a social agent (usually the government) in order to make changes in the natural or spontaneous process of transforming reality. Thus, the Institute must keep abreast of all advances made in academic and scientific circles, governmental circles and among other specific social agents, with regard to the cognitive aspects of planning, which in the long run make up the substance of its concrete actions. In so doing, it should be both active and critical; this means that the Institute must

/constantly strive

constantly strive to take a position with respect to the dynamics of the theoretical frontier of planning.

53. This position must always be consistent with the dual role of the Institute as a permanent agency of the United Nations system, on the one hand, and as an inter-governmental body, on the other. Thus, in both roles, it must take a pluralistic approach to the doctrinal aspects of planning.

54. From the technical point of view, in 1984 the Institute will have to pay increasing attention to innovations and experiences in the practice of planning within and outside the region. In particular, it must continue formulating and developing analytical models for socio-economic phenomena, of a deterministic nature; econometric models suited to socio-economic phenomena with stochastic regularity, as well as more complex models suited to uncertain and non-structured situations and phenomena in which human and social decision-making play an important part.

55. With regard to the substantive phenomenon of social and economic development, the Institute's work -which is consistent with the work of other agencies and particularly of ECLA- will be geared to different approaches. In each national environment it will be important to define the economic policy instruments that appear to be most suitable so as to give coherence to the immediate process of adjustment and reorganization and their articulation with the mediate processes of reactivation and development. At the regional level, it will be important to define the common features that enable the member countries to exchange concrete experiences with economic policy co-ordination or carry out concerted action in given aspects of regional development. On a wider scale, it will be important to continue the Institute's effort, as decided at the Fifth Meeting of the Technical Committee, to follow the dynamics of how the economies of the region fit into the international economic order and to anticipate alternative scenarios for the future.

56. This latter aspect is implicit in the Programme of Work for 1984 in a very concrete proposal, i.e., that the Institute, with economies of scale, should conceive, draw up and disseminate a minimum set of external parameters that would be useful to member countries, so that, if they wish to do so, they may make more reliable projections of their main aggregates (fiscal, monetary, or pertaining to exchange), even if only for the following year. In no way will this entail redoing or duplicating similar work that has already been done in the more developed countries, in certain international organizations or within organizations whose jurisdiction is limited to the region. In 1983, the Institute prepared four reports on this question, so that it can now envisage achieving concrete results in 1984; nevertheless, it needs the necessary resources to put these new activities under way.

57. Another matter that has not yet been considered and which the Institute deems to be of such importance that it has included it among its subject-matter nuclei for 1984 is the question of the decentralized part of the public sector. Preliminary studies carried out in 1983 show that in almost every country, the volume of resources handled by the decentralized bodies of the public sector tends to be three, five or seven times higher than the volume of resources handled directly

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by the central government. This gives rise to new concerns with respect to the practice of planning, especially during these years of crisis. Indeed, a significant part of the short-term efforts at adjustment and reorganization may be cancelled out, or at least neutralized, because of the autonomy in decision making which the decentralized sectors enjoy.

58. With respect to this question, the Institute considers it necessary to carry out at least four clearly differentiated but interrelated studies. The first will be aimed at obtaining a better knowledge of the decentralized sector and drawing up a suitable functional typology of the entities of that sector. The second will be oriented towards the conception and implementation of different public policies for each category of decentralized entity identified during the first study.

59. A third study will be designed to meet the need for special accounting schemes for the decentralized sector. These should have at least two major advantages, i.e., they should show financial and real aspects of the decentralized entities by means of a regular and reliable reporting system that can be updated every two or three months, and the accounts so reported should be included in an aggregated budget so that the central government may be aware of the macroeconomic impact of all the decentralized entities as a whole. This system of aggregated accounts should include complete data on funding sources (such as charges for services, fiscal and credit income, internal and external sources) as well as on the use that is made of such resources, with specific and detailed reference to those which refer to gross fixed capital formation.

60. A fourth study will be designed to satisfy the growing interest in finding out about the many ways in which the central government is articulated with its decentralized entities and with enterprises and entities of the private sector. This calls for a more systematic knowledge of the different ways in which governments participate in mixed-economy enterprises, a matter which is undoubtedly becoming more and more important at this time of crisis. This is the case because while it is vitally important to monitor aggregate flows of a) fiscal resources and expenditures, b) changes in the monetary base and net domestic credit, and c) the balance of payment and the cumulative external debt, it is also important that this be accomplished without inhibiting -any more than absolutely necessary- the capacity for growth of private enterprise. Similarly, it is important not to restrict unnecessarily government investment and other modalities for allocating public resources that play a more vital role in setting the pace of the direction of the development process.

61. As regards social aspects, the Programme of Work for 1984 concentrates on two major subject-matter areas: the public sector's role in the region in the near future and certain specific needs pertaining to the conception and implementation of social programmes and projects.

62. There are several different lines of work on the role of the public sector in the region. At the most abstract level is the need to evaluate, revise and supplement the knowledge available in the region with respect to the current functions of the State as the political expression of the nation. At this level, therefore, the Institute is continuing its work on such matters as participation and social consensus (mandates given to the Institute at the Third Conference of Ministers and Heads of Planning of Latin America and the Caribbean, Guatemala, 1980).



63. At a more concrete level, the Institute is concerned with identifying the impact of the current crisis on the functions of the State, i.e., the new responsibilities which fall upon it in its dual role as a regulator and a producer of goods and public services, the additional social pressures on the supply of those goods and services, its current capacity to mobilize resources to foster economic and social development, and the degrees of liberty it enjoys in deciding on how to allocate its own resources. Indeed, when external indebtedness and the interdependency of the national economies in their asymmetrical relations with the developed countries restrict the attraction of external savings and make it necessary to apply domestic policies calling for severe austerity, the autonomy of the State to make decisions regarding public expenditure is obviously reduced.

64. At another, even more practical level, the Institute's work is concerned with restating the actual techniques for drawing up public projects in the social sphere. In principle, a review should be made of the programming of such projects -i.e., of how the resources are to be used- in order to guarantee over a period of several years the supply of resources for fixed capital formation (investment) and operating (current) expenditures that are essential for the implementation of projects. There are obvious shortcomings, even at the project level, in the techniques used to evaluate social projects, where the conventional cost-benefit approach is not so effective.

65. Finally, the Institute plans to work closely with other agencies, especially the Division of Social Development and Humanitarian Affairs of ECLA, on a more systematic study of the impact of the crisis in the social sphere, i.e., both on the composition and dynamics of the social structure and on the indicators of well-being. In the latter case, the Institute considers it desirable to visualize the effect of the current crisis on employment, income and consumption, taking these three aspects all together.

B. Activities of the administration and general services  
to member countries

66. The Administration of the Institute will continue with its policy of disseminating the programme of work in a more up-to-date and detailed fashion in order to enable the member countries to make more specific requests for collaboration. Although this information is mainly directed to the national planning agencies, it is also accessible to other government agencies in the economic and social sphere in each country and particularly to those responsible for co-ordinating international technical co-operation activities, often within the ministry for foreign affairs.\*/

67. As is well known, in 1977 the planning ministries and bodies of the region established their own system of co-operation, which operates through the Conferences of Ministers and Heads of Planning of Latin America and the Caribbean. The Institute will continue to serve as the technical secretariat for this system and in 1984 will prepare for the Fifth Conference, to be held in Mexico during the

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\*/ See ILPES: Twenty-one years of activity, 1962-1983, E/CEPAL/ILPES/Conf.4/L.1, paragraph 61.

first half of 1985, with the sponsorship of the Secretariat for Programming and Budget. The eighth session of the Technical Committee of the Institute, its highest collective deliberation body, will be held during the Fifth Conference. During the second half of 1984, the seventh session of the Technical Subcommittee will be held in Brazil (Brasilia) and ILPES will act as the Technical Secretariat for that session. The Institute, along with the Regional Office for the Caribbean of ECLA, will also provide support for the meetings of planning experts of the Caribbean.\*/

68. In addition, the Institute is putting underway a new publications programme which will enable it to keep the member countries better informed about its activities and the results of its work; these publications will also be more suitable vehicles for exchanging national experiences in the area of planning and economic policy. At the same time, this reprogramming is being carried out under strict austerity measures, taking into account the budgetary restrictions of the member countries and, in particular, those of the Institute itself.\*\*/

69. In 1984, the Administration of the Institute will pursue its current policy of streamlining its procedures. This will involve improving the integration of all the technical work done within the Institute, strengthening the support given by ILPES headquarters to the work being done in member countries, reorganizing administrative and accounting services, establishing new criteria for the recruitment of technical staff and consultants, improving programming and follow-up on projects being implemented, strengthening interinstitutional relations within the United Nations (within and outside the ECLA system), intensifying internal technical discussions by setting up working groups and increasing the frequency of the sessions of the Technical Committee, and consolidating the restructuring of the directing body of the Institute. Efforts to strengthen or apply new internal information systems will also be pursued; this includes information on sources of horizontal co-operation, a list of specialized consultants and information on national planning agencies and training and research centres working in areas similar to the functional areas in which the Institute works. This programme will be carried out jointly with the Information System for Co-operation in Planning (INFOPLAN), under a project agreed upon with CLADES and the Caribbean Documentation Centre. All the advances made in this regard will be made available to the member countries.\*\*\*/

70. The Institute also expects to continue with its new project aimed at providing systematic and regular information on the main parameters of the world economy required for the macroeconomic projections of individual member countries, particularly in connection with the annual forecasts for their fiscal, monetary and foreign-currency budgets. In fact, now is just the right time for the Institute to do this, since it can achieve considerable economies of scale because the findings of a small technical team can be disseminated to all the member countries. This project is designed to avoid duplication with similar work being done by other international agencies; it provides instead for a systematic analysis

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\*/ Ibid., paragraphs 18, 62 and 63.

\*\*/ Ibid., paragraphs 17 and 58.

\*\*\*/ Ibid., chapter IV.

to be made of anticipated trends -from the standpoint of the region's concerns- and for the results to be disseminated promptly so as to meet, in so far as possible, the member countries' timetables for drawing up their budgets and macroeconomic forecasts.\*/

#### C. New bases for horizontal co-operation

71. In 1984, special emphasis should be placed on work aimed at restating the premises of horizontal co-operation and promoting it. As a multilateral agency, the Institute is clearly in a position to promote South-South co-operation more pragmatically and effectively, within the region and, through interinstitutional co-ordination, to extend it to Africa and Asia. Because the countries of the region have accumulated considerable technical capacity, it would be particularly useful to increase this type of co-operation through triangular relations, with ILPES performing a mobilizing and catalytic role. In particular, the strengthening of such ties may contribute to the success of policies aimed at achieving the recovery of production and employment, which were hard hit by the current crisis.\*\*/ Given the importance of this issue, the results of research carried out by ILPES to establish its bases for action in the area of horizontal co-operation are presented in annex II.

#### D. Advisory services, training and research

72. Under the advisory services programme, which is its most direct link with the activities of the countries, the Institute will continue collaborating with the governments of the region through the general services it provides without direct cost to the countries, the regular services it provides upon request and the special services it provides through agreements which provide for a financial contribution to be made by the countries themselves or by other international agencies. The Institute is gradually changing the way in which it provides advisory services in order to guarantee full technical support from its headquarters to the experts and consultants working on individual projects. At the same time, an effort is being made to orient advisory services mainly towards the creation or strengthening of a nation's institutional capacity in order to improve its long-term prospects for the transfer of technologies and methodologies. Parallel to this an effort is being made to raise the institutional and administrative level at which technical co-operation is provided in order effectively to support those who are responsible for taking decisions with regard to economic policy. The Institute's specific advisory services are being conceived in such a way as to include -whenever possible- collateral in-service training (or direct training) and research activities, in order to ensure that the counterpart agency receives the greatest possible benefit from the services offered by the Institute in its various fields of work. Field activities, in turn, allow for a flow of feedback to the Institute in connection with its training and research activities, thus setting up an ongoing process for improving and refining the methodologies applied in the advisory programmes.

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\*/ Ibid., paragraph 66.

\*\*/ Ibid., paragraphs 19 and 20.

73. On the basis of the aforementioned concepts, the Institute will continue providing member countries with methodological information and sending technical support missions in connection with the various functional areas in which it works, particularly planning and economic policy and public-sector programming pertaining to direct administration and to the decentralized sector. Support through technical missions will depend on the availability of specific financing. In any event, the main activities of this programme are carried on outside the Institute's headquarters and thus concern specific individual countries.

74. The following advisory activities are envisaged for 1984. In the area of planning and economic policy, the Institute will co-operate with Costa Rica, Guatemala, Honduras and Paraguay. In the area of public sector planning, it will be working in Ecuador and Guatemala. In the area of social planning, it will co-operate with Costa Rica and Guatemala. In the area of regional and local planning, it will provide advisory services to Brazil, Ecuador and Haiti. In the area of pre-investment and projects, it will co-operate with Haiti and the Dominican Republic.

75. The Institute has carried out training activities throughout its 21 years of existence. It has also carried out other activities pertaining to planning and co-ordination of public policies. As far as courses are concerned, the Institute will continue to offer them at three levels. There is a basic level and an advanced level, the latter being designed for the study of more highly specialized subjects by senior professionals actually working in the public sector or in activities at the formal post-graduate level in which the Institute is working together with universities and higher educational centres in the region.

76. The following training activities will be carried out in 1984:

a) International courses: Course on long-term planning and the environment; course on international trade and development; workshop-course on current problems and alternative development strategies.

b) National courses: Ninth ILPES/CENDEC course on regional development planning in Porto Alegre, Brazil; course on regional development planning in Río Cuarto, Argentina, sponsored by ILPES and the Universidad Nacional de Río Cuarto/CFI/UNDP; course on planning of natural mineral resources; course on public-sector programming, sponsored by ECLA, ILPES, the United Nations Environment Programme (UNEP) and the Paraguayan Centre for Economic and Social Development Studies (CEPADES), in Paraguay; basic course on planning techniques, Asunción, Paraguay; course on social planning for non-governmental organizations, Santiago, Chile; course on planning and economic policy, sponsored by ILPES and the Banco de la República, in Bogotá, Colombia.

c) Special courses: Fifth course on the State and economic policy and development in Latin America, sponsored by ECLA, ILPES and the Ibero-American Co-operation Institute (ICI), to be held in Madrid, Spain.

d) Formal post-graduate courses: Post-graduate course on situational planning, sponsored by the Venezuelan Planning Institute, ILPES and UNDP, in Caracas, Venezuela; co-participation in the master's programme in planning,

/sponsored by

sponsored by ILPES, the University of Santo Domingo and the University of Grenoble, to be held in the Dominican Republic; continuation of work under the agreement on collaboration with the Institute for Social Studies of The Hague, Netherlands.

e) Seminars and panels: Parallel to its regular courses at different levels, the Institute's work in organizing seminars and symposia is becoming increasingly important. Several such activities will be carried out in 1984. In some cases, ILPES will be directly responsible for the activity and in others it will be a co-participant.

f) Interinstitutional agreements: The Institute has kept in touch with other national and international bodies with a view to establishing interinstitutional co-operation programmes. These include the Latin American Faculty of Social Sciences (FLACSO), the World Bank, the Ibero-American Co-operation Institute (ICI), the International Centre for Training in Environmental Sciences (CIFCA), the Institute for Social Studies of The Hague, the Inter-American Planning Society (SIAP), the Ibero-American Social Security Organization (OISS), the Organization of American States (OAS), the World Health Organization (WHO), the Pan American Health Organization (PAHO), the Latin American Energy Organization (OLADE), UNESCO and UNCTAD.

g) Collaboration with universities and academic centres: University of Zulia, Maracaibo, Venezuela; CIFCA, Madrid, Spain; the Centre for Development Training (CENDEC), Brazil; the Centre for Development Training (CECADE), Mexico; "José María Vargas Vila" Agreement, Bogotá, Colombia.

77. The following research projects will be carried out:

a) Planning and economic policy

- i) the international recession and its effects on the design of economic policy and medium-term plans in Latin America and the Caribbean, 1982-1984
- ii) models of planning and economic policy
- iii) short-term forecasts of the external framework of national planning
- iv) the system of administration and planning of the economy in Cuba
- v) alternative development strategies for Ecuador.

b) Public-sector planning

- i) typology of the decentralized public sector
- ii) integrated accounts system for the public sector
- iii) forms of articulation between the central government, its decentralized entities and the private sector
- iv) planning and public policies for the decentralized sector
- v) role of the State in the promotion, planning and management of development.

c) Social planning

- i) impact of the international recession on the social sectors and on the implementation of social development plans
- ii) methodology for the formulation and evaluation of social projects
- iii) intersectoral programmes for planning in the area of health
- iv) social policies in countries of the Southern Cone.

d) Regional and sectoral planning

- i) effects of recent changes in the international economy on the planning of intra-regional development of countries
- ii) methods and approaches for energy planning.

Annex 1

ILPES: SUMMARY OF ACTIVITIES, 1981-1984

Background information

Particular attention should be drawn to the close relationship which has existed between the governments and ILPES during the period covered by this summary. The planning bodies of the region have participated actively in the orientation and follow-up of its programme of work and in specific activities of the Institute. The support of the planning bodies has also resulted in the approval and implementation of a regular system of supplementary financing. In mid-1982 a new Director assumed his duties at ILPES; with the support of the planning bodies, he placed priority on the preparation of a new programme of work in keeping with the priorities of the governments and the financing of the Institute. It was also necessary for him to make internal adjustments in the organization of ILPES, bearing in mind the new tasks to be carried out, in view of the reduction in its resources.

As noted above, during this period the governments participated more intensively in ILPES activities, as illustrated by the fact that three meetings of the highest governmental bodies which guide ILPES were held, namely, the Fifth Meeting of the Technical Sub-Committee, the Fifth Meeting of the Technical Committee and the Sixth Meeting of the Technical Sub-Committee.

In November 1982 the Fifth Meeting of the Technical Sub-Committee of ILPES was held at San José, Costa Rica. All the members of the Sub-Committee were in attendance and, for the first time, representatives of the Ministries of Foreign Affairs also participated as observers. The bases for the new form of programming ILPES activities which was presented by the new Directorate of the Institute, was the main subject addressed at the meeting; the proposal for a regular system of supplementary financing was considered, and progress was made in the discussion of the technical documents to be presented at the fourth Conference of Ministers and Heads of Planning of Latin America and the Caribbean.

The Fifth Meeting of the Technical Committee took place in Buenos Aires on 10 May 1983 on the occasion of the fourth Conference of Ministers and Heads of Planning of Latin America and the Caribbean. The meeting was attended by the representatives of 21 member countries and by the Executive Secretary of the Economic Commission for Latin America and the Assistant Administrator of the United Nations Development Programme.

At this meeting the participants elected the new officers of the Technical Committee and the members of the Technical Sub-Committee. The results were as follows:

Officers of the Technical Committee

Chairman: Mexico  
First Vice-Chairman: Brazil  
Second Vice-Chairman: Costa Rica  
Rapporteur: Guatemala

Members of the Technical Sub-Committee

Chairman: Mexico  
First Vice-Chairman: Brazil  
Second Vice-Chairman: Costa Rica  
Rapporteur: Guatemala  
Directors: Colombia  
Cuba  
Venezuela

In his statement to the Committee, the Director of ILPES pointed out that, under its new arrangements, the Institute could act in all the member countries no matter what their system of government might be. He referred to the dual role of ILPES as a regional body of the United Nations within the ECLA system in which the United Nations Development Programme played a major part and as an intergovernmental body dedicated to multilateral co-operation at the service of the governments. In reference to the programme of work, he stated that the various activities should converge upon a set of core subjects to be adapted to the evolving problems encountered in economic policy and planning in each country. These core subjects were: the planning and co-ordination of economic policy decisions on the short, medium and long terms; the position of the region in the world economy of the near future; the territorial effects of global and sectoral economic policies; and the role of the public sector, particularly with regard to social development policy.

The members of the Committee were in favour of the programme of work which was submitted and agreed that it constituted a realistic effort which was consistent with the priorities of the countries of the region and which could help to make co-operation among the various planning bodies of the region more dynamic. With respect to the financing of the Institute, they were united in urging international bodies to maintain the financial support of ILPES and, for the first time in the history of the Institute, they approved the establishment of a regular system of supplementary financing based on voluntary contributions.

The Sixth Meeting of the Technical Sub-Committee was held at Mexico City on 28-29 November 1983. The meeting was chaired by the representative of Mexico, and was attended by all the members of the Sub-Committee as well as representatives of the Ministries of Foreign Affairs in the capacity of observers. The subjects addressed at this meeting included the review of the new institutional plan for 1984-1986; the situation with respect to the fulfilment of the resolutions of the Fifth Technical Committee; new horizontal co-operation services; the technical proposal for the fifth Conference of Ministers and Heads of Planning of Latin America and the Caribbean, to be held in Mexico in 1985; the Programme of Work of ILPES for 1984; and the recommendations concerning ILPES to be presented by the governments at the twentieth session of ECLA (Lima, 29 March to 6 April 1984).



The participants in the meeting reaffirmed their support for the Institute and its Programme of Work. They also expressed their satisfaction with the results of the supplementary financing system, since by that time a number of governments had signed the memorandum of understanding, and stressed the importance of the new horizontal co-operation services proposed by the Directorate of ILPES. They were pleased to accept the proposal of the representative of Brazil that Brasilia should be the venue of the Seventh Meeting of the Sub-Committee.

Another notable development during this period was the strengthening of the System of Co-operation and Co-ordination among Planning Bodies of Latin America and the Caribbean which was represented by the fourth meeting of the highest forum of Ministers and Heads of Planning of the region (Buenos Aires, Argentina, 9-10 May 1983). The fourth Conference was organized by the Secretariat of Planning of the Office of the President of Argentina and the Latin American Institute for Economic and Social Planning.

The Conference was attended by the Vice-President of the Republic of Ecuador and the Ministers, Heads of Planning or representatives of Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Haiti, Honduras, Mexico, Panama, Paraguay, Peru, Suriname, Uruguay and Venezuela. The meeting was also attended by the Executive Secretary of the Economic Commission for Latin America, the Director of the Regional Bureau of the United Nations Development Programme (UNDP) and representatives of ten other United Nations bodies. Observers from six intergovernmental organizations and four non-governmental agencies were also present, in addition to special guests representing the Government of Spain, the Secretary-General of Economic Affairs and Planning, and the Director-General of Planning of the Ministry of Economic Affairs and Finance. It was noted that new approaches should be used in the application of planning as a tool of government and of orientation for the private sector in order to promote economic activity, to utilize resources as efficiently as possible and to guarantee fairness. With a view to achieving self-reliance on the long term, the responsibilities of the governments with respect to interpreting, orienting and reactivating economic and social development would increase in the future. Under these circumstances, planning would once again be an irreplaceable tool for introducing new forms of rationality into the co-ordination of public sector policies and the promotion of general well-being. This would require the reformulation of the planning systems which have been applied in the past.

Another important activity during this period was the support provided by ILPES to ECLA with respect to the work of the Technical Secretariat of the Meetings of Planning Directors and Technicians of the Caribbean which function within the framework of the Caribbean Development and Co-operation Committee. ILPES participated in the activities of the working groups created as part of this mechanism for co-operation among planners in the Caribbean and also took part in the Third Meeting of Heads of Planning of the Caribbean, which was held at Port of Spain, Trinidad and Tobago, from 28 April to 2 May 1983. The Planning Information System (INFOPLAN), which is administered by CLADES with the support of ILPES, continued to function during this period as part of the co-operation among planning bodies.

The publication of books and booklets continued, as did the preparation of the Planning Bulletin (in Spanish and in English).

It is important to note that ILPES has strengthened its relations within the United Nations system and has created links with important institutions both inside and outside the region in order to carry out its Programme of Work. This Programme focused on the areas of operation within its field of specialization: economic policy and planning; public sector planning; social planning; regional planning; and pre-investment and projects. Work began to move forward on the above-mentioned core subjects. Activities were carried out through the basic programmes of Training, Advisory Services and Research, while special attention was devoted to horizontal co-operation during this period.

In connection with Training, 7 international courses, 11 national courses and 5 special courses were organized. Support for various national training centres was stressed. Training activities have been conducted by the Institute throughout its 21 years of existence. The Institute will continue its practice of offering courses at two different levels: basic and advanced. The advanced level is devoted to an examination of more highly specialized topics and is aimed at senior professionals practicing in the public sector or conducting activities at the formal post-graduate level, in which case the Institute works in association with universities and centres of higher learning in the region.

With respect to Advisory Services, attention was directed towards the least developed countries and to the most backward regions in the developing countries. During this period co-operation was provided to planning bodies in the following countries: Brazil (State of Minas Gerais, Piauí, the North-Eastern Region), Costa Rica, Colombia (Cali), Ecuador (Cuayaquil), Chile, Guatemala, Haiti, Honduras, Panama, Dominican Republic, Nicaragua and Venezuela.

In the area of Research, work continued with respect to the ongoing research concerning the status of planning in Latin America and the Caribbean, and a number of research projects were undertaken in the areas of operation and core subjects discussed above.

In the priority area of horizontal co-operation, ILPES promoted co-operation agreements involving important national institutions among various countries. Mention should be made of the agreement with the General Co-ordinator of Agroindustrial Development (CODAI) of Mexico, the co-operation among pre-investment agencies in various countries of the region and the co-operation activities, in conjunction with ECLA, concerning manpower planning which were carried out with the Economic Commission for Africa. More recently ILPES conducted the first mission to assess horizontal co-operation within the framework of the System of Co-operation and Co-ordination among Planning Bodies of Latin America. The mission, which took place in September and October 1983, included interviews with 104 authorities in Bogotá, Brasilia, Buenos Aires, Caracas, Lima, Quito, Mexico City and Santiago. Five groups of senior experts were systematically interviewed: planning authorities, those responsible for technical co-operation in foreign affairs, representatives of scientific communities, business leaders, and authorities in the area of pre-investment and trade promotion.

After reviewing the status of horizontal co-operation in the countries selected, the mission dealt with the proposals for additional services in this sphere, devoting special attention to users, resources and co-ordination among existing bodies.

In regard to the suggestions for new horizontal co-operation services, the mission identified the following fields:

- a) Formulation of plans and policies;
- b) Programming of public sector activities;
- c) Macroeconomic follow-up and short-term analysis;
- d) Support for regional (intra-national) development bodies;
- e) Pre-investment and project activities;
- f) Science and technology;
- g) Technical co-operation;
- h) Social development.

In summarizing the activities of ILPES during this period, the following elements should be noted:

- a) Closer ties with the governments which have participated directly in the activities of ILPES;
- b) Strengthening of the System of Co-operation and Co-ordination among Planning Bodies of Latin America and the Caribbean, whose highest forum -the Conference- met at Buenos Aires in 1983 and will meet again in Mexico City in 1985;
- c) A new approach by which horizontal co-operation in planning will form a basic component of the activities of the Institute to promote development in the region;
- d) The advancement of training by means of new approaches to activities at the international level, an increase in activities at the national level and strong support for national training centres;
- e) Research in priority areas in line with the needs of the governments;
- f) Advisory services, with emphasis on relatively less developed countries and on the more backward regions of more developed countries;
- g) The establishment of a regular system of supplementary financing and the signing of memoranda of understanding specifying their contributions by a number of governments;
- h) The expansion of the relations of ILPES with United Nations bodies, international and bilateral co-operation institutions, and with entities and governments outside the region;
- i) Modernization of the internal structure of ILPES and of its administrative procedures.

Lastly, during this period a smaller financial contribution, but also the strongest support, were received from the United Nations Development Programme, which has aided ILPES ever since it was founded.

A list is given below of the main documents which were published, the meetings in which ILPES has participated and a summary of the principal activities carried out in its basic operational areas of Training, Advisory Services and Research.

1. Main documents and publications

1981

Boletín de Planificación No. 13

Planning Bulletin No. 8

"El estado actual de la planificación en América Latina y el Caribe", ILPES Cuadernos series, No. 28

Planning a System of Regions (English translation of the document "Diseño de planes regionales")

1982

"Política económica, organización social y desarrollo regional", ILPES Cuadernos series, No. 29

Experiencias de Planificación Regional en América Latina (ILPES/IAPS text)

Boletín de Planificación Nos. 14 and 15

Planning Bulletin No. 9

"Construcción, validación y uso de modelos de experimentación numérica: aplicaciones al caso de Costa Rica", Temas de Planificación series, No. 5

Pobreza, necesidades básicas y desarrollo, ECLA/ILPES/UNICEF

Disparidades regionales en América Latina

1983

Fourth Conference of Ministers and Heads of Planning, Fifth Meeting of ILPES Technical Committee: Bases of organization and proposal of agenda (E/CEPAL/ILPES/Conf.4/L.1)

ILPES: Twenty-one years of activity, 1962-1983 (E/CEPAL/ILPES/Conf.4/L.2)

ILPES: Its role in the region and programme of work for 1983 (E/CEPAL/ILPES/Conf.4/L.3)

Summary of the technical documents prepared by ILPES for the fourth Conference of Ministers and Heads of Planning of Latin America and the Caribbean (E/CEPAL/ILPES/Conf.4/L.4)

Planning and economic and social policy in Latin America and the Caribbean (E/CEPAL/ILPES/Conf.4/L.5)

Planning and development in the Caribbean area: Background and prospects  
(E/CEPAL/ILPES/Conf.4/L.6)

2. Seminars, meetings and conferences

1981

- Sixth Session of CDCC (St. George's, Grenada, 4-10 November)
- Meeting of the Ad Hoc Working Group on Manpower Planning (St. George's, Grenada, 14 and 15 September)
- First Meeting of the Ad Hoc Working Group on Physical and Regional Planning (St. George's, Grenada, 16 and 17 September)
- Nineteenth session of ECLA (Montevideo, Uruguay, 4-16 May)
- Seminar on public enterprises in development planning in Central America and the Caribbean, organized jointly with the National Planning Office of Costa Rica (OFIPLAN) and with the sponsorship of the United Nations Development Programme and the Central American Institute of Public Administration (ICAP). A document, entitled "Estilos de planificación y sistemas de empresas públicas en América Latina", was presented (June)
- First technical meeting on participation in planning, organized jointly with the Central Office for Planning and Co-ordination (CORDIPLAN) of Venezuela. The background document of the research project on participatory planning in Latin America was presented (June)

1982

- International Symposium on Social Development Policies, organized jointly with the Americas Section of the United Nations Children's Fund (UNICEF), with the collaboration of ECLA. The following documents were presented: "Las grandes controversias de la política social", "Consideraciones económicas para la política social y dimensión social de la política económica", and "Condiciones económicas y políticas de los problemas sociales concebidos como problemas de distribución" (April)
- Technical seminar on participation in planning, organized jointly with the Ministry of Planning and Economic Policy of Panama, and held at Panama City. A briefing document was presented on participation in planning processes (July)
- Meeting on the compatibilization of short-term policies and medium- and long-term planning (Caracas, Venezuela)
- Fifth Meeting of the Technical Sub-Committee (San José, Costa Rica, November)
- Colloquium on planning crises and emergencies (Aviles, Spain, August)
- International seminar on Latin American and Brazilian experiences in regional planning (Belem, Pará, Brazil, November)
- Second Latin American seminar on regional and state planning (Recife, Brazil, December)

1983

- Second subregional meeting on decentralization and urban development (Mexico City, January)
- Fourth Conference of Ministers and Heads of Planning of Latin America and the Caribbean (Buenos Aires, 10 May 1983)
- Fifth Meeting of the Technical Sub-Committee of ILPES (Buenos Aires, 10 May 1983)
- Third Meeting of Heads of Planning of the Caribbean Countries (Port of Spain, Trinidad and Tobago, 28 April to 2 May 1983)
- International seminar on the social effects of large dams in Latin America, organized jointly with the Inter-American Centre for Integrated Social Development (CIDES) of the OAS, with the sponsorship and financing of the Ministry of Social Action and the Secretariat of Water Resources of the Argentine Republic, the sponsorship of the Ministry of Health and the Environment, and the collaboration of the Inter-American Development Bank (IDB), the World Bank, the German Foundation for International Development (DSE) and the Inter-American Centre for Labour Administration (ILO). A paper drafted jointly with CIDES, entitled "Aspectos sociales de las grandes represas", was presented (July)
- Seminar on social policies in Uruguay, organized by the Latin American Centre of Human Economy (CLAEH) and the Association of Social Planners of Latin America (APSAL), with the sponsorship of ILPES. A document entitled "Desarrollo social y planificación social: Tendencias, problemas y perspectivas" was presented (September)
- Seminar on social development policies in Chile, organized in conjunction with the Association of Social Planners of Latin America (APSAL) and the Institute of Sociology of the Catholic University of Chile, with the sponsorship of CIDES (OAS) and the Inter-American Planning Society (IAPS) (Santiago, Chile, October). A document entitled "Significado y contenidos del desarrollo social, la planificación social y las políticas sociales" was presented.
- Complementary Symposia on the social effects of large dams in Latin America, held in conjunction with CIDES (OAS) (Buenos Aires, Argentina, December)
- Sixth Meeting of the Technical Sub-Committee of ILPES (Mexico City, November)
- Third Latin American seminar on regional and state planning (Brasilia, December)

1984

- Appraisal of population re-location processes, a seminar held in conjunction with the Inter-American Centre for Integrated Social Development (CIDES) of the Organization of the American States (OAS) and the National University of Misiones (Posadas, Argentina, March)

3. Technical assistance to countries of the region

1981

Brazil

Advisory services concerning the strengthening of the planning system of the State of Minas Gerais

Brazil

Advisory services concerning the formulation of industrialization policies for the North-Eastern Region

Brazil

Strengthening the planning system of the State of Piauí

Colombia

Advisory services concerning urban and metropolitan development planning provided to the City of Cali

Ecuador

Advisory services to the Study Commission for the Development of the Río Guayas Basin

Haiti

Advisory services to the Ministry of Planning for strengthening the planning and projects system

Nicaragua

Formulation and assessment of projects for the agricultural sector

Panama

Advisory services in connection with short-term planning

Venezuela

Advisory services in the area of municipal development planning

1982

Brazil

Strengthening the planning system of the State of Minas Gerais

Brazil

Advisory services to IPEA in connection with industrialization policies for the North-Eastern Region

Brazil

Strengthening the planning system of the State of Piauí

Colombia (Cali)

Advisory services in connection with urban and metropolitan development planning provided to the City of Cali

Ecuador

Advisory services to the Study Commission for the Development of the Río Guayas Basin

Honduras

Advisory services to the Higher Council of Planning concerning the current economic situation and development financing

Venezuela

Advisory services in connection with integrated municipal developing planning

1983

Brazil

Strengthening the planning system of the State of Minas Gerais

Brazil

Advisory services to IPEA concerning industrialization policies for the North-Eastern Region

Brazil

Strengthening the planning system of the State of Piauí

Ecuador

Advisory services to the Study Commission for the Development of the Río Guayas Basin

Ecuador

Advisory services to the Secretariat of Integrated Rural Development (SEDRI) concerning planning and integrated rural development

Ecuador

Advisory services to CONADE concerning municipal development

Chile

Preliminary work in preparation for advisory services in the area of municipal development planning (in co-ordination with the joint ECLA/CELADE Human Settlements Programme)

Dominican Republic

Advisory services to the National Planning Office (ONAPLAN) concerning the strengthening of the projects system

Haiti

Co-operation with the Ministry of Planning concerning the strengthening of the planning and projects system

Costa Rica

Advisory services to the Ministry of National Planning and Economic Policy in connection with the implementation of its development strategy

Honduras

Advisory services to the Higher Council of Planning in connection with long-term programming

Guatemala

Advisory services to the General Secretariat of Planning concerning the preparation of the bases for a development strategy



#### 4. Training

1981

##### International courses

Central planning course (20 April-13 November). Participants: 45.

International course on social planning (6 April-12 June). Participants: 29.

##### National courses

Brazil, Brasilia (CENDEC/IPEA-ILPES/ECLA); Sixth course on regional development planning (8 September-27 November). Participants: 25.

Brazil, Brasilia (UNICEF/CENDEC/ILPES); Second national course on social planning (31 August-23 October). Participants: 31.

Brazil, Belo Horizonte; Third seminar-course on theoretical and applied aspects of regional State planning in a national context (December)

Panama (MIPPE of Panama and ILPES); Seminar-course on economic policy and regional development (1-18 December). Participants: 23.

##### Special courses

Spain, Madrid (ICI/IEPAL/ILPES); Course on development problems in Latin America (26 October-4 December). Participants: 42 Spanish professionals.

Costa Rica, San José; Course on planning and economic and social policy (18 May-25 September).

Paraguay, Asunción; Seminar-course on human settlements and regional development (July). Course on short-term planning (15 June-7 August).

##### Activities in connection with national training centres

Co-operation with CECADE (Mexico) and CENDEC (Brazil) and co-operation with training centres in other countries of the region.

1982

##### International courses

Central planning course (19 April-15 October). Participants: 42.

International course on social planning (ILPES/UNICEF) (24 March-30 July).  
Participants: 24.

Seminar-course on long-term planning and the environment (ILPES/ECLA-UNEP and CIFCA).  
Participants: 30.

##### National courses

Intensive course on agricultural planning (Tegucigalpa, Honduras). Participants: 32.

Workshop-course on operational aspects of the Guayas development plan (Guayaquil, Ecuador). Participants: 26.

Course on planning and development (Río Cuarto, Argentine Republic) (9 August-3 September). Participants: 30.

Sixth course on regional development planning (Recife, Brazil) (13 September-3 December). Participants: 21.

#### Special courses

Course on development processes and problems in Latin America (Madrid, Spain) (25 October-1 December). Participants: 45.

#### Activities in connection with national training centres

Co-operation with CECADE (Mexico) and CENDEC (Brazil), the National Project Office (Paraguay) and CIFCA (Spain).

1983

#### International courses

Workshop-course on current problems and development strategies in Latin America and the Caribbean. ILPES headquarters, Santiago, Chile (26 September-2 December). Participants: 34.

Workshop-course on current development policies and problems in Latin America (CIDE-Mexico, ILPES), Mexico City (26 September-9 December). Participants: 33.

Course on long-term planning and the environment (ILPES/ECLA-UNEP and CIFCA). ILPES headquarters (11-29 July). Participants: 25.

Course on planning and the environment (ECLA/UNEP/ILPES and CIFCA), with the collaboration of ORPALC-UNEP, CAF and CONADE (Quito, Ecuador, 14 November-2 December).

#### National courses

Course on agroindustrial projects (Asunción, Paraguay) (ILPES/CEPADES/ONP-STP and with support from UNDP/World Bank and CODAT) (Mexico, 11 July-26 August). Participants: 32.

Sixth course on regional development planning (Belem, Brazil) (ILPES/CENDEC/SUDAM/CPR) (19 September-9 December). Participants: 33.

Course on agricultural projects (Tegucigalpa, Honduras) (ILPES/Ministry of Natural Resources/UNDP/AID) (10 October-16 December). Participants: 27.

#### Special courses

Course on the State, economic policy and development in Latin America (ICI/ILPES) (24 October-18 November). Participants: 40 professionals from Spain and 10 Latin American fellows.

#### Activities in connection with national training centres

Co-operation with CECADE (Mexico) and CENDEC (Brazil) and co-operation with training centres in other countries of the region.

5. Research

1981

The status of planning in Latin America and the Caribbean  
Compatibilization of short-term policies and medium- and long-term planning  
Planning and social policies  
Public enterprises  
Planning and municipal administration

1982

The status of planning in Latin America and the Caribbean, 1980-1982  
Planning and development in the Caribbean area: Background and prospects  
Compatibilization of short-term policies and medium- and long-term planning  
Participatory planning in Latin America  
Planning and social policies  
Social policies in the Southern Cone

1983

Status of planning and economic and social policy in Latin America and the Caribbean  
Compatibilization of short-term policy and medium- and long-term planning  
Situation and prospects of the international economy in the 1983-1984 period  
The role of the State in the mixed economies of the region  
Social effects of the crisis  
Participation in the planning process  
Social effects of large-scale public works  
Sectoral social policies  
The regional dimension in planning  
Local planning

Annex 2

ILPES: NEW BASES FOR HORIZONTAL CO-OPERATION

Horizontal co-operation should basically be understood as the solidary provision of services among public and private enterprises, especially when it is limited to the intra-regional context. This co-operation may take four forms: co-operation among public enterprises, co-operation among private enterprises, a public enterprise providing services for a private enterprise or vice versa. However, the possibility of combining bilateral multilateral operations -both in supply and reception of the service- adds to and enriches the prospects for linkage.

At the international level, all the bodies concerned with development are prepared to orient and encourage horizontal co-operation actions. Some of them have received even more specific mandates and have built up considerable experience in this field. In its sphere of duties -that is, the planning and co-ordination of economic and social policies- ILPES has also received and has been fulfilling significant mandates in this respect.\*/

At the Fifth Meeting of the Technical Committee of ILPES (Buenos Aires, May 1983), the Ministers and Heads of Planning adopted the Institute's new Programme of Work. Among its basic tenets, the Programme indicated that in the area of multilateral technical co-operation, the Institute would collaborate by supporting the countries in technical and economic complementation, making better use of installed capacity in each of the countries, activating their exchanges of knowledge and experience and strengthening the institutional framework for increasing co-operation, and even by generating receptive capacities in those countries which need them. In all these aspects, the total amount of economic and social activities of each country should be considered, and an attempt should also be made to make use of the potential of private enterprises and to open areas for bilateral co-operation without weakening regional co-operation, emphasis should be placed on maintaining a practical approach in co-operation activities and, finally, the activities should insofar as possible be linked with the other regional and subregional bodies of Latin America and the Caribbean, which will avoid overlapping activities with other existing bodies and programmes.

In order to fulfil the mandates of the governments and the Programme of Work adopted by the Ministers and Heads of Planning, ILPES, as indicated in the report of activities, carried out a preliminary mission designed to establish new bases for horizontal co-operation in the framework of the System of Co-operation and Co-ordination among Planning Bodies of Latin America and the Caribbean (SCCOPALC).

The report of the results of the results of the mission \*\*/ contained the following conclusions:

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\*/ ECLA resolutions 315 (XVI) and 371 (XVII).

\*\*/ See ILPES: New services for horizontal co-operation, VI-ST/5, presented at the Sixth Meeting of the Technical Sub-Committee of ILPES, Mexico City, 28 and 29 November 1983.

a) There was a large installed capacity in the countries and a clear willingness to use it in a solidary or complementary fashion. Some feeling of criticism related to the fact that specific horizontal co-operation experiences were still limited, and often redundant or out of step with each other, both at the national and regional levels.

b) There were clear indications that in spite of this, the multiple and marked difficulties existing among the countries open up a range of opportunities for the solidary exchange of services or for other economic complementation activities. Under these circumstances, together with systematic efforts at regional integration, there is a potential area, not fully utilized as yet, for bilateral or triangular co-operation within what is usually designated as South-South co-operation.

c) Material possibilities for horizontal co-operation within the region go beyond the framework within which they have been utilized until now. Two arguments are especially significant in this time of crisis. One is that horizontal co-operation can be a contributing factor for maintaining some areas of activity and bringing about a recovery of national levels of production and employment in the long term, especially without exerting further undesirable pressure on the countries' external indebtedness situations. The other argument is that horizontal co-operation can be strengthened as an instrument for defending the region within the current international economic order and can gradually help improve the region's possibilities for reformulating the difficult -and, at the same time, essential- dialogue with the North.

d) The horizontal co-operation situation in the region is, in a certain respect, contradictory. Its potential has caused it to be promoted, as a regular task, in the programmes of work of many international bodies, both in the areas of technical and economic co-operation. At the same time, there have not been created a sufficient number of effective credit mechanisms with conditions for supporting higher levels of horizontal co-operation, and especially, with a higher capacity to attract private enterprises.

e) Within the countries the resources intended for horizontal co-operation have generally not been guaranteed stability and appropriate material expansion. In such cases, support by multilateral bodies is sometimes hindered by a failure to give timely effectiveness to the resources provided as national counterpart funds.

f) The fact that from the institutional point of view, there appears to be an obvious reluctance to make horizontal co-operation more flexible through broad administrative reforms. It would be suitable for each country to have some administrative unit, even a very small one, which would be highly operative and exclusively devoted to the co-ordinated management of resources specifically for horizontal co-operation. In some countries, this institutional resource already exists and represents an ability to produce immediate changes in streamlining horizontal co-operation. The multisectoral requests for horizontal co-operation, whether from public or private users, should be channeled to those units. At the

same time, on a regional scale, measures should be available for activating a Latin American reference unit, which could provide services for different countries, especially through the prompt intercommunication of regional needs and availabilities in the area of horizontal co-operation. Once more, the rate of decision-making must be sufficiently rapid to attract public and private enterprises and enable them to compete in a timely way with the extra-regional entities offering similar services.

With regard to proposals for new horizontal co-operation services, the following aspects deserve mention:

a) It is recognized that the multiplicity of international bodies connected with horizontal co-operation activities and the proliferation of programmes and actions oriented towards this field, require two preliminary concerns. First, the extension of any new services to be introduced should be carefully delimited, so that there is no overlapping with regard to goals or forms of operation. Second, the creation of new bodies should be avoided, for it would broaden the complex network of national and international bureaucracies already operating in this area of co-operation; in this connection, governments are frankly reluctant to support the expansion of this network to the international scale.

b) There is, rather, an immediate need for activation and institutional linkage. This effort should include the reprogramming of national funds for this co-operation linked, as far as possible, to those funds available or mobilized outside of the region. On a national scale, the small technical nucleus devoted exclusively to promoting and providing services should as far as possible be integrated into existing bodies with experience and responsibilities in the area of co-operation. The new activation and linkage functions of these new services should also be absorbed by already-existing regional bodies.

c) The implementation of the new horizontal co-operation services may take place at two levels. In an inter-institutional sphere, a specific programme which will combine the technical co-operation activities of ILPES with those of UNDP, DTCD, ECLA, SELA, etc., with economic co-operation activities (in which the potential role of the IBD is particularly important, although other similar organizations should be included). In the sphere of the Institute itself, past actions carried out in this area should be reexamined and broadened to include the range of activities currently being developed by national bodies of planning or co-ordination of economic policy (see table 1).

d) The major objective of the new services should be to streamline horizontal co-operation by bringing together public and private agents in the region, in their two roles as providers and receivers of co-operation. In this spirit, it is intended to promote a new linkage between international technical co-operation bodies, international economic co-operation bodies and national bodies for planning and co-ordination of economic and social policies or which are operating from Ministries of Foreign Relations in the area of co-operation.

e) In each country which joins the new programme, support lent to the planning or foreign affairs bodies through these new horizontal co-operation services could include, inter alia: the physical and financial programming of horizontal co-operation activities; identification of supply and demand according to different areas of knowledge and economic or social activity, either by public or private sectors; development of negotiations with one or several other countries, by means of advisory assistance in contracting and information on lines of credit and availability of resources; information on areas of operation and priorities of international agencies participating in technical or economic horizontal co-operation activities and assistance in choosing counterpart alternatives, projects or activities and modalities of co-operation (see table 1, column 2a).

f) Although from the Institute's perspective, the new horizontal co-operation services should be oriented towards national planning and foreign affairs bodies, such services can also be useful, directly or indirectly, to national development and pre-investment funds, science and technology entities, universities, State enterprises, private enterprises, agencies for the expansion of goods and services and sectoral ministries in addition to some of the international bodies already operating in the region. In any event, linkage with national planning bodies always has the advantage of making possible or fostering a multisectoral co-ordination of horizontal co-operation on a national scale.

g) Certain principles must guide the design and implementation of the new services. Despite the fact that some of the principles already appear in the extensive United Nations bibliography on horizontal co-operation (in particular that of ECLA), reference to that documentation will be avoided here. The principles set forth below are above all the result of the survey concluded recently by ILPES. All or most of the financial contributions of each government should be in national currency; at the same time, the funds reserved for those purposes in the countries should be stable and have adequate liquidity. The new services should not represent an additional burden for the countries, but should be self-financing on the basis of their own efficiency. At the same time, co-operation activities should be freely elected by the respective governments. The new services should not mean competition with existing national or international agencies, but rather, should function as a practical catalyst for the new horizontal opportunities being opened up in the region, both in terms of activities and resources.

h) Users and activities envisaged: The countries which join the new services should generally broaden their activities in both the lending and receiving of horizontal co-operation, potentially benefiting both public and private sectors. In this respect, potential users may include:

- i) offices for the co-ordination of technical co-operation connected with national planning bodies, ministries of foreign affairs or other national institutions;
- ii) national pre-investment and projects offices;

- iii) national and regional development corporations and funds;
- iv) decentralized public entities;
- v) mixed-economy enterprises;
- vi) science and technology boards or agencies;
- vii) universities and research institutes;
- viii) national entrepreneurial associations and private enterprises.

i) Each potential user will be able to offer or receive co-operation by participating in programmes of joint interest both directly, with its own technical corps, and by subcontracting specialized enterprises in the region. The details of this participation will be specified at the appropriate time with respect to each of the two basic types of activities which may be included in this new modality of co-operation: supply of services or of installations and equipment. The first type would include activities of planning, programming, advisory services or technical consultancy, improvement of human resources, applied research and exchange of knowledge and publications. It would also include co-operation in certain basic studies, elaboration of projects, feasibility studies, process and project design, procedural norms and regulations, technical instructions and exchange of related documentation. In addition, it would include different modalities of provision of co-operation, directly associated with these activities (technical travel, sabbatical programmes, seminars, etc.). The installations and equipment supplied would include some material infrastructure, although, of course, not current commercial transactions of goods and services. Where justified, this category should be broadened to include the carrying-out of some fixed investments in specialized constructions for pre-investment and research, equipment and material for experimental purposes and other categories of technical infrastructure which are essential to a more effective implementation of the horizontal co-operation envisaged.

j) Until now, the majority of activities relating to the supply of installations and equipment have been incorporated into the different lines of North-South co-operation. There are strong indications that an appropriate horizontal co-operation mechanism may reverse this tendency and increasingly benefit public and private enterprise throughout the region. Two important arguments may be added to this: first, that the component which corresponds to the second type of activity makes it possible to produce more lasting effects with regard to horizontal co-operation; second, that the proper inclusion of this component in the new horizontal co-operation mechanism can mean a considerable saving of foreign currency for the region as a whole.

k) Some concepts relating to resources: In addition to sufficient human resources and political will, financial resources are essential ingredients for effective horizontal co-operation programmes. This aspect is thoroughly dealt with in the international literature on horizontal co-operation, especially following the Buenos Aires Plan of Action. However, in this case, too, the following comments are primarily based on the recent ILPES survey. The current lack of certain lines of financing for horizontal co-operation programmes justifies some current criticisms: operations that are scattered, slow and sporadic, far below the capacities available in the region and contained in the services as such.



However, if overall availabilities for financing horizontal co-operation are conceived as a new and creative combination of specific credits from international bodies and funds mobilized within the countries, a very fertile prospect for the strengthening of intra-regional co-operation may be seen.

l) Details concerning the procurement, allocation and control of resources will, of course, have to be discussed and approved by the governments and by the organizations connected with these new services. However, some guidelines may be set forth here, less as proposals than as preliminary choices for orienting the discussions which are to be held. For the allocation of resources, the new horizontal co-operation activities must take into account the seriousness of the balance-of-payments disequilibria and the external indebtedness of the countries of the region and base themselves on new concepts which will make possible maximum use of the countries' national currencies. In this line of ideas, governments which join the new mechanism should be able to budget their own resources, which will be contributed in national currencies (although in amounts set in an equivalent value in hard currency) and intended specifically for horizontal co-operation. It is supposed that this allocation of resources may combine different situations within the following modalities (which will, of course, vary from one country to another and depending upon their economic capacities); one more limited type for financing public and private entities in the country providing horizontal co-operation; another broader type so that each receiving country will defray the cost of the horizontal co-operation which it requests from the other countries.

m) As already noted, the unit for linking horizontal co-operation should be close to the national planning bodies or ministries of foreign affairs or should be a combination of both alternatives. This does not mean blocking other forms which may be taken by this co-ordinating unit, which in any event should be close to the inter-governmental centres which formulate and co-ordinate overall economic and social development policy or external policy. The national resources allocated to the new services should be administered directly by the member countries and released and controlled by those horizontal co-operation units. That is, the member countries should allocate their resources exclusively to those operations which they themselves decide to sponsor.

n) At the appropriate time, the bases for constituting and administering these national funds should be defined. However, it may be supposed that a consensual compensatory system will help balance the uses of resources and obtain the best possible results from each operation for the countries directly participating in them. In order for a co-operation system to function effectively, it will be important for the new services to be able to promote a high degree of transparency in demand for and supply of horizontal co-operation perceived as needed in the member countries. A system of compensation will make it possible for the total amount of own resources allocated by the member countries ultimately to become the effective counterpart to other financing to be negotiated with financial assistance bodies. If it is possible to implement a concept of this nature, resources may be mobilized for horizontal co-operation on a scale that will be more effective than that noted in the past or attained in the present.

o) The new services should complement other services already created by UNDP (SRI) to supply the member countries with appropriate up-to-date information on possible programmes of operation, national priorities and financial availabilities, both with regard to multilateral financing and national counterpart funds. Ideally, they should make it possible to save national expenditures by making the best possible use of multilateral financing and avoiding duplication of projects or overlapping of resources for related goals.

p) The new services should be designed and implemented with a realistic approach. Some of the member countries will be relatively more developed, they will be able to maintain high levels of mutual co-operation among themselves and will have a higher capacity for lending co-operation to other countries than for receiving co-operation. At the opposite extreme, the relatively less-developed countries will have more need for co-operation and a lower capacity for providing it, and there will certainly be others in an intermediate situation, more balanced with respect to their needs and capacities in the provision of horizontal co-operation. A mutual decision to establish a typology of countries -which would take into consideration this aspect of the regional situation- may provide an important basis for creating new horizontal co-operation services and making them into an effective instrument for reciprocal multilateral aid and at the same time, of interest for bilateral operations.

q) Essential linkage among existing bodies. It bears repeating to say that the effectiveness of the new services requires solidary co-operation from various bodies operating in the region, even beyond those mentioned above. In particular, they should make possible a better linkage between the technical and financial co-operation bodies. At least two reasons motivate these considerations on inter-institutional co-ordination.

First, the development of the region, the technical and institutional strengthening of its governments and the available entrepreneurial capacity in many countries, are factors which make a vigorous reexamination of traditional technical co-operation necessary. At the same time, pressures are growing on the insufficient budgets' of the multilateral technical co-operation bodies. Finally, the governments confronting the current economic crisis -particularly those with serious external indebtedness situations- are finding it more and more difficult to allocate foreign currency to absorb international technical co-operation. These three different reasons suggest that a new horizontal co-operation mechanism should be aimed at, which will selectively complement the current availability of multilateral technical co-operation and gradually replace it by South-South operations, in those fields where the region already has capacity of its own.

Second, there are certainly horizontal co-operation possibilities, not yet sufficiently developed, for forming special funds maintained by contributions in national currencies but which at the same time can serve as counterpart funds for procuring specific financing from outside the region. The implementation of the new services -when they are close to national planning bodies or other national bodies with responsibilities in the area of programming of public spending- may be of use to technical co-operation bodies by providing resources which will streamline potential operations and, at the same time, benefit some financial co-operation bodies by making more stable and adequate national counterpart resources available to them.

r) Furthermore, a well-planned linkage between multilateral technical co-operation and horizontal co-operation may take on special importance in the coming years when the current economic crisis will continue to produce its effects both on the external accounts of the member countries and on the availability of resources from the international bodies. In principle, countries with greater capacity to receive technical co-operation and at the same time greater capacity to lend horizontal co-operation, may, in selected cases, assume duties relating to the "retransfer" of assistance. That is to say, they may retransmit the benefits of extraregional co-operation through their own lending of horizontal co-operation to other countries of the region. A service organized in this way may enable the effects of the international technical co-operation received to become broader and the links of intra-regional solidarity to be strengthened.

s) By agreement with the Secretariat of ECLA and within the mandates with which it has been entrusted by member governments, ILPES may assume additional responsibilities in the framework of the new services being proposed here. The following factors may be indicated as "assets" of the Institute for exercising this new role: its twenty-one years of experience in planning and development; its status of central body for the System of Regional Co-operation among National Planning Bodies (SCCOPALC); its closeness to technical co-operation bodies both in planning offices and ministries of foreign relations; its ability to support at the national level, the creation, strengthening and operation of pre-investment and projects offices; its nature of permanent United Nations body which has worked in close connection with UNDP; its nature of inter-governmental body with programmes of work supervised by the members and heads of planning, and finally, its basic confidence in the possibilities of horizontal co-operation in the region.

Table 1

MAKING HORIZONTAL CO-OPERATION MORE FLEXIBLE: KEY SUGGESTIONS OBTAINED BY ILPES a/

Operations performed at national planning bodies <u>b/</u>	Suggestions for new regional services (see chapter III) <u>c/</u>	Suggestions for new services within ILPES (see chapter IV)
1. Formulation of plans and policies (18, 11)	<p>Use of national capacity to articulate horizontal co-operation with the basic development and foreign policy priorities.</p> <p>Creation of fund in national currency for mutual financing of horizontal co-operation to be run by the countries.</p> <p>Establishment of funds in national currencies as counterpart of extra-regional credits for horizontal co-operation.</p>	<p>Exchange and publication of experience with adjustment policies.</p> <p>Promotion of joint studies on economic and social impact of the external debt.</p> <p>Exchange and publication of information concerning system of indicators relating to the analysis of the current international economic situation.</p> <p>Support of countries in creation and/or improvement of the institutional capacity to co-ordinate horizontal co-operation.</p>
2. Programming activities of public sector (19, 12)	<p>Articulation of bilateral sources of horizontal co-operation (countries) with multilateral co-operation agencies (technical and financial).</p> <p>Integration of roles of suppliers of State enterprises by sector.</p> <p>Inventory of the goods manufactured by State enterprises.</p>	<p>Exchange of experience on integration of public accounts (central government and decentralized sector).</p> <p>Exchange of experience in management and control of the decentralized sector.</p> <p>Support for manpower training in programming, management and follow-up of public works.</p> <p>Assistance specifically in the preparation of standards for public project bidding and contracting (national and decentralized governments).</p>

Table 1 (cont. 1)

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	Establishment of communications links between public and private sectors with a view to creating the best conditions for State purchases in an atmosphere of horizontal co-operation.	
	Provision of advisory services in the articulation of horizontal co-operation with technical co-operation as a whole.	
3. Macro-economic planning and conjunctural analysis (21, 13)	Feasibility study concerning a minimum data network on leading technical and horizontal programmes and projects in the region in the fields of: - development policies - short-term policies.	Exchange of methods and techniques of conjunctural analysis.  Organization of courses on conjunctural analysis and reports.
4. Support to regional (intra-national) development bodies (22, 14)	Exchange of regional development experience relating to marginal areas.  Articulation of studies of regional frontier development corporations.	Exchange of experience on "regional projects banks".  Exchange of experience among regional development funds.  Intercommunication of experience on fiscal and administrative decentralization.
5. Preinvestment and project activities (23, 14)	Completion and improvement of existing systems for: - Organizing a pool of advisors by branch and discipline; - Intercommunication of profiles/summaries of projects of regional interest with a view to building up inventories of projects in execution and to be executed.	Exchange of experience in study and project financing.  Strengthening the institutional capacity of the countries in connection with preinvestment and projects.  Publication of pre-investment bids of interest to the private or public sectors of the region.

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Table 1 (cont. 2)

	<p>Proposing visa facilities for public and private entrepreneurs engaged in horizontal co-operation activities.</p> <p>Support for the development of national consulting firms and for their relations with international credit institutions.</p>	<p>Helping governments to prepare models for bidding within the region.</p>
6. Science and technology (24, 15)	<p>Promoting the exchange of industrial property among national bodies.</p> <p>Support for the preparation of inventories of national capacities with regard to material and human resources in the field of science and technology.</p> <p>Diversification and promotion of the exchange of research workers.</p> <p>Making the best use at regional level of the installed infrastructure in the field of science and technology.</p>	<p>Course on preparation of national science and technology programmes.</p> <p>Extension of activities in manpower training in science and technology (experimental techniques, management, skilled employment, etc.).</p> <p>Redistribution of fellowships in the region to make the best possible use of the existing resources and to reduce the expenditure of foreign currency in this connection.</p>
7. Technical co-operation (24, 15)	<p>Adding to and improving existing systems for:</p> <ul style="list-style-type: none"><li>- Organizing archives or technical registries showing supply and demand in or for the countries.</li></ul> <p>Establishment of horizontal co-operation funds in national currency, administered directly by the countries.</p>	<p>Supporting ministries and national bodies in the programming of horizontal co-operation carried out under the development policy.</p> <p>Course in 1984 on international technical co-operation for planning and foreign relations personnel (including machinery for hiring, monitoring experiences and availability of sources, etc.).</p>

Table 1 (concl.)

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	Publication of possibilities for joint private investment in the region and putting private associations in contact with joint ventures.	Working with different substantive divisions of ECLA in their activities, taking advantage of the Institute's contacts with national planning offices.
8. Social development (25, 15)	Financing programmes for the exchange of methodologies and research with regard to: - programming of social expenditure; - mobilization of resources for the social sector; - basic social indicators.  Support for horizontal co-operation designed specifically for the exchange of information relating to the social aspects of the adjustment models, for the benefit of governments, universities and research centres.	Establishment of links with other horizontal co-operation bodies in the fields of food and nutrition.  Support of ILO and PREALC in diffusion of employment strategies and policies.  Joining other international bodies in helping to mobilize specialized technical and institutional knowledge in the fields of health, education, housing and social security by means of fellowships, internships and advisory services.  Exchange of experience in natural disasters and emergency projects.

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a/ An exploratory mission to 9 countries in which a total of 101 interviews were conducted in September and October 1983 with five groups of high officials in each country (see paragraph 10).

b/ The bracketed references indicate the paragraph and page in which the work performed by the national planning offices is referred to in the document entitled "ILPES: Its role in the region and programme of work for 1983" (E/CEPAL/ILPES/Conf.4/L.3) adopted at the Fourth Conference of Ministries and Heads of Planning of Latin America and the Caribbean (Buenos Aires, May 1983).

c/ In the Institute's proposal it is suggested that the new mechanism be based on the experience accumulated and that it should articulate what is already being done, particularly in UNDP, DTCD, ECLA, IDB and SELA.

The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every entry should be supported by a valid receipt or invoice. This ensures that the financial statements are reliable and can be audited without issue.

In the second section, the author details the process of reconciling bank statements with the company's ledger. This involves comparing the bank's records of deposits and withdrawals against the internal accounting records to identify any discrepancies.

The third section covers the preparation of the monthly financial statements, including the income statement, balance sheet, and cash flow statement. Each statement provides a different perspective on the company's financial health and performance over a specific period.

Finally, the document concludes with a summary of the key findings and recommendations for improving the accounting process. It suggests implementing more robust internal controls and using modern accounting software to streamline operations and reduce the risk of errors.