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C E P A L  
Comisión Económica para América Latina  
Tercera Conferencia Regional sobre la  
Integración de la Mujer en el Desarrollo  
Económico y Social de América Latina y  
el Caribe  
México, D.F., México, 8 al 10 de agosto de 1983

CORRIGENDUM

En la página 5, párrafo 23, del documento E/CEPAL/CRM.3, suprímase la llamada 5/ y sustitúyase por un \*/.

Al pie de la página 5 inclúyase la siguiente nota de pie de página:

\*/ La Asamblea General, mediante su resolución 33/186 del 29 de enero de 1979 pidió la racionalización del sistema bi-anual integrado de informes, la que, entre otras, tendría la función de tomar en cuenta las disparidades regionales en los criterios de evaluación.

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## Part One

### ORGANIZATION OF WORK

#### 1. Place and date

1. The Latin American Technical Meeting on Industrialization took place at ECLA headquarters in Santiago, Chile, from 7 to 10 May 1984. The meeting was convened by ECLA in compliance with United Nations General Assembly resolution 38/192, which recommends that regional meetings should be held in preparation for the Fourth General Conference of UNIDO, and in accordance with the decision taken to this effect at the twentieth session of ECLA at the time of the adoption of the Commission's programme of work and calendar of conferences.

#### 2. Attendance \*/

2. The meeting was attended by representatives of the following States members of the Commission: Argentina, Brazil, Canada, Chile, Colombia, Dominican Republic, Ecuador, France, Haiti, Jamaica, Peru, Spain, United Kingdom, United States, Uruguay and Venezuela.

3. Representatives of the United Nations Industrial Development Organization (UNIDO) from the United Nations Secretariat attended the meeting.

4. The following United Nations body was also represented: United Nations Development Programme (UNDP).

5. The specialized agencies of the United Nations represented at the meeting were: International Labour Organization (ILO), United Nations Food and Agriculture Organization (FAO) and the World Bank.

6. Observers from the following intergovernmental bodies also participated: Andean Development Corporation (CAF), Board of the Cartagena Agreement (JUNAC), Inter-American Institute for Agricultural Sciences (IIAS), Intergovernmental Committee for Migrations (ICM), Latin American Economic System (SELA), Latin American Integration Association (ALADI) and Permanent Secretariat of the General Treaty for Central American Economic Integration (SIECA).

7. Representatives of the following non-governmental organization also attended: Latin American Food Industry Association (ALICA) and Latin American Industrial Association (AILA).

8. Messrs. Salvador Garcilita Castillo and Iván Rivera attended the meeting as special guests.

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\*/ See the list of participants contained in annex 1.

### 3. Election of Officers

9. The deliberations of the meeting were presided over by the following Officers:

Chairman:	Chile
First Vice-Chairman:	Ecuador
Second Vice-Chairman:	Dominican Republic
Rapporteur:	Argentina

### 4. Opening and closing meetings

10. The Executive Secretary of ECLA, Mr. Enrique V. Iglesias, the Acting Head of the Regional and Country Studies Branch of the Division of Industrial Studies of UNIDO, Mr. Herman Muegge, and the Chairman of the Meeting, Mr. Francisco Javier Recabarren, addressed the participants at the inaugural ceremony, which took place on 7 May.

11. Messrs. Herman Muegge, as representative of UNIDO, and Norberto González, on behalf of ECLA, spoke at the ceremony which marked the closing of the meeting. The representative of Brazil, Mr. José Antonio de Macedo Soares briefly addressed the meeting to express the appreciation of the participating delegations. Finally the Chairman, Mr. Francisco Javier Recabarren, brought the work of the meeting to a close.

### 5. Adoption of the report of the meeting

12. At the final plenary meeting, the participants adopted this draft report and requested the Executive Secretary of ECLA to forward it to the member governments and to the Permanent Secretary of SELA so that the report might be issued at the meeting to be convened by that body at Havana on 22-25 May and so that it might be considered in the adoption of the common position of Latin America and the Caribbean at the Fourth General Conference of UNIDO.

### 6. Agenda

13. The following agenda was adopted by consensus at the first plenary meeting:

1. Election of Officers
2. Adoption of the agenda
3. Assessment and outlook of Latin American industrialization; progress and limitations
4. Industrial policy options in the light of the recent economic crisis and of long-term objectives
5. International co-operation for the industrial development of Latin America
6. Conclusions and recommendations
7. Consideration of the report of the meeting.

Part Two

I. THE INDUSTRIALIZATION PROCESS AND THE CURRENT RECESSION

1. From a long-term perspective, the Latin American economy expanded relatively rapidly in comparison to the world as a whole. In the thirty years between 1950 and 1980 the regional product grew much more rapidly than that of the developed economies of the West. This growth was a general phenomenon among the countries of Latin America and the Caribbean.
2. The industrialization process contributed to the fact that between 1950 and 1980 the manufacturing sector's share in the global product rose from 19% to 25%. Over one-fourth of this economic growth directly corresponds to industrial expansion, which accounts for nearly one-third of the increase in per capita income. Nonetheless, industrialization has in general not altered the external vulnerability of the Latin American economies.
3. The growth in manufacturing began to slacken at the time of the international economic crisis which began in 1973-1974, and its production level later dropped significantly. An overall setback of greater or lesser proportions in manufacturing activity has been seen in most of the countries. The level of industrialization has regressed ten years or more, on average, in the countries concerned.
4. The causes of the crisis are complex and have been analysed in a number of forums and studies, notably in the Quito Declaration and Plan of Action which was adopted at the Latin American Economic Conference.
5. Along these lines, and while acknowledging the industrial heterogeneity of the countries of the region, attention should be drawn to a group of shared internal and external factors which have contributed to the crisis in the manufacturing sector of the Latin American and Caribbean countries.

Internal factors

- Insufficient articulation within the industrial sector.
- Insufficient articulation of the industrial sector with the other sectors of production, particularly agriculture and mining.
- The relative lack of articulation between the industrial model and the energy base. Some countries have begun to correct this situation since 1973-1974.
- A low level of internal scientific/technological development accompanying the expansion of industrial productive capacity.
- The insufficient development of small and medium-sized industries and the precarious nature of their articulation with large-scale enterprises.

- Indiscriminate protectionism, which has led to inefficiency and tariff-related measures that have affected the utilization of installed industrial capacity
- The limited nature of the efforts made to promote regional industrial and technological co-operation. Since the beginning of the present crisis, there have been clear indications of a political willingness to promote new modes of industrial and technological co-operation in the region in order to mitigate the effects of the crisis.
- Limited knowledge and little in-depth consideration of the implications for Latin America of the industrial and technological changes which have been taking place in the developed countries with respect to spearhead sectors and to the modernization of traditional industries.

#### External factors

- A loss of dynamism in the developed economies, which has resulted in a reduction of Latin American exports of manufactures.
- Increased protectionism on the part of the developed countries.
- A sharp deterioration in the terms of trade, particularly in the prices of the region's raw materials, which resulted in a decrease in the capacity to import the inputs and capital goods needed for regional industrialization.
- The dwindling flow of credit to the region, excessively high interest rates and onerous external credit terms have hampered the execution of new industrial projects due to high finance costs.
- The revitalization of traditional industrial activities in the industrialized countries that has come about as a result of technological changes has hindered an appropriate redeployment of industry favouring the developing countries.

6. The predominance of external factors -which are not under the control of the Latin American and Caribbean countries- in the present industrial crisis in these nations limits the region's opportunities for overcoming that crisis.

Along with the above, attention should be devoted to some factors which, in the future, may aggravate the situation in the developing countries' industrial sector. One such factor is the slower pace of economic growth in the industrialized countries and, particularly, in the developing countries as compared to past decades. Furthermore, there are factors which point to a far-reaching change in the industrial and technological patterns of the developed countries which would reduce the opportunities for growth of the developing countries' industrial sector.

The technological advances being employed by the developed countries to create comparative advantages that will permit a greater development of their industrial sectors -in opposition to, and to the detriment of, the natural comparative advantages possessed by the developing countries- is a circumstance to which the latter should be alert and which should be taken into account by them in deciding upon their future policies in this respect.

Finally, it should be stressed that any regional industrialization process will be decisively affected by the manner in which the external debt problem is resolved; that solution must necessarily be geared to the countries' ability to pay in such a way that the debt service will represent a reasonable percentage of their exports -thus making the adjustment less costly- so that national development strategies will not be affected and the process of de-industrialization being experienced in the area may be reversed.

## II. SPHERES OF ACTION

7. Overcoming the crisis in the industrial sector will depend upon the solution of a complex set of factors; however, a series of key areas and elements for future industrial development can be identified which will have a bearing on the short, medium and long terms.

8. The international experience and the transition towards a new industrial/technological model being undergone by the most advanced countries point to the importance of achieving a productive articulation between the State and private enterprise in the Latin American industrial sector in relation to both the internal sphere and the search for an efficient form of insertion in the international economy. The forms which such articulation takes will be determined by specific national factors.

9. It is imperative that the industrial sector should be more efficiently articulated in the future with its various sub-sectors within each country so that integrated industrial processes may be established. The articulation of the industrial sector with the other sectors of production in the economy must also be improved and, in turn, linked to the still unsatisfied needs of Latin America and the Caribbean.

### a) Articulation within the industrial sector

The capital goods industry is a sub-sector which plays a fundamental role in creating and spreading technological development, in generating jobs for skilled and unskilled labour, and in the investment process, the definition of economic and social structures, and international economic relations.

Reactivating and developing the capital goods industry requires the formulation and implementation of specific policies which, in order to be effective, must be maintained over time.

Such policies should include the use of State purchasing power, the establishment and refinement of financing mechanisms for both domestic sales and capital goods exports, and the development of engineering and appropriate technologies.

A concerted, complementary effort must be made to create and upgrade scientific and technological educational infrastructures which will respond to engineering and skilled manpower needs.

At the sectoral level, the electricity sector has provided an outstanding example of pioneering regional action: in response to the Quito Plan of Action, the Regional Electricity Integration Commission (CIER) has created an ad hoc group to identify, with the assistance of ECLA, mechanisms which will allow the electricity sector's regional demand for capital goods to be used to benefit local industries.

b) Articulation of the industrial sector with other sectors of the economy

Articulation with the other sectors of the economy, in both directions, would provide the industry with cheaper and more suitable inputs and would also allow it to take advantage of the large markets opening up to it in order to deal with a range of demands for industrial inputs which, for various reasons, have not been met.

An efficient linkage between the agricultural and industrial sectors and the development of agro-industry are of particular importance in view of the magnitude and strategic nature of the region's food problem.

Emphasis should also be placed on the as yet partial linkages among industry, energy sources and the processing of natural resources constituting basic inputs for industry and other sectors which systematically add to the value of raw material exports.

As regards articulation with the financial sector, there is a clear need for credit on more favourable terms and conditions for the operation and investment of enterprises in the industrial sector.

c) Articulation of the industrial sector with the fields of science and technology

Stress was placed on the need for progressively more efficient linkages between the scientific/technological sector and the productive sector.

In this respect, scientific and technological policy should be in keeping with the basic objectives of economic and social development.

Moreover, the rapid technological advances achieved in recent years in spearhead technologies make it imperative for the Latin American countries to hasten their development of a regional technological exploration and information system so that they will be in a position to minimize the negative effects which the application of such advances might entail, as well as to take advantage of the opportunities which are opening up as a result of these same technological breakthroughs.

A technological development strategy should, inter alia, take the following areas into account: (i) the promotion of technological development in the capital goods industry; (ii) the regulation of the importation of technology; (iii) the definition of technological criteria for the acceptance of foreign investment and the assessment of this channel for technology transfer; (iv) the application of active State purchasing policies; (v) mechanisms for strengthening technological research and development; (vi) technical training and assistance for industry; (vii) standardization and quality control; (viii) support for engineering and consulting services at both the national and regional levels; (ix) human resource training.

d) Small and medium-sized enterprise

Given the importance of small and medium-sized enterprise for economic and social development, the need for supporting their development was underscored.

e) Regional industrial co-operation

On various occasions the Latin American countries have assigned a very important role to the various forms of co-operation in order to intensify their industrial development.

Based on the analysis of the present situation and future prospects, the following spheres of concerted action should be considered:

- i) The strengthening and vitalization of current integration schemes.
- ii) The intensification of reciprocal trade in manufactures among the countries of the region with a view to overcoming the limitations of the national markets.
- iii) The use of State purchasing power to benefit regional suppliers.
- iv) The use of collective bargaining power to gain greater access to the markets of the developed world for industrial products.
- v) The creation or reinforcement of regional or subregional machinery for technological research and development in priority areas.
- vi) Scientific/technological information, particularly regarding new technological advances.
- vii) Support and preference for regional advisory services and engineering.
- viii) The co-ordination of quality control and technical standardization systems.
- ix) Support for efforts aimed at the final structuring of the United Nations Financing System for Science and Technology for Development.
- x) The exchange of experiences in regulating the importation of technologies as well as in their adaptation, development and dissemination within the region.
- xi) Horizontal co-operation in training mid-level technical cadres.
- xii) The promotion of Latin American multinational enterprises, including capital goods producer's consortiums.



- xiii) The establishment at the regional level of closer relations among national units and centres for the promotion of the capital goods industry.
- xiv) The interconnection of national financial machinery for the sale of capital goods in the region.

### III. RECOMMENDATIONS

10. The industrialization process in Latin America and the Caribbean faces serious problems and poses great challenges which must be overcome in order to attain levels of development in keeping with the economic and social needs of the region. The situation in which Latin America finds itself is marked by a sharp decline in the levels of industrialization in most of the region's countries, as well as the need to re-formulate its industrial development models so that an import substitution policy may be suitably combined with the growth of export sectors and the strengthening of small and medium-sized industry. The far-reaching technological changes which have been taking place and the heterogeneity of industrialization levels are other factors which must be borne in mind, together with the serious problems caused by the international economic crisis.

11. In this context, the co-operation which UNIDO may provide becomes indispensable as regards a search for alternatives and the solution of the problems affecting the respective industrialization processes of the countries of Latin America and the Caribbean.

12. Although the co-operation of UNIDO has been effective and of great assistance in the various countries, it is insufficient in view of the needs of the region.

In particular, it is recommended that greater emphasis should be placed on the participation of UNIDO in:

a) Identifying and setting into motion specific co-operation mechanisms among the developing countries;

b) Expanding the number of Senior Industrial Development Field Advisers in Latin America and the Caribbean;

c) Increasing the participation of Latin American and Caribbean technicians in the organization's activities, especially those directed towards the region;

d) The assignment by UNIDO of priority in its activities to co-operation among developing countries;

e) With respect to the field of analysis and research, it is recommended that intensified study should be devoted to the continual monitoring of structural changes occurring in the national and international spheres.

The publication of periodic assessments of development trends in the various industrial subsectors, especially in terms of regional and world market trends, is also recommended.

The analysis of major new technological developments and the evaluation of their influence and applications in the industrialization process of Latin America and the Caribbean are also felt to be necessary;

f) The intensified future development by UNIDO of programmes for the transfer of technology from the more developed countries to countries at an intermediate stage of industrialization and from the latter to the least technologically developed nations;

g) It is recommended that the assessment of the UNIDO consultation system should be continued with the object of making it a more effective mechanism for strengthening co-operation in specific industrial sectors;

h) Reinforcing services for promoting investment and redeployment by proceeding with the establishment of a network of national promotion centres in developed and developing countries and by mobilizing outside resources for individualized investment projects.

13. The efforts of the Latin American countries to reactivate and develop the capital goods industry should be vigorously supported by ECLA and UNIDO through the regional project which they are carrying forward in this area and through their regular activities.

Bearing in mind the internal and external factors discussed above, the outlook for the industrialization process in Latin America is uncertain and difficult; with this in mind, the countries of Latin America and the Caribbean reaffirm the need to strengthen and develop, inter alia, the following tasks:

- To introduce changes into the modalities of regional industrialization;
- To intensify regional and intra-regional co-operation mechanisms;
- To design industrial strategies at both the national and regional levels which are in keeping with the new realities and problems facing the development of the industrial sector including, inter alia, the depressed level of domestic demand for industrial products in the region;
- To maintain up-to-date information on the technological and structural changes taking place in the developed countries and within the region;
- To promote joint activities aimed at obtaining additional financial resources for the developing countries with obvious comparative advantages in order to reactivate their industrial sector in the shortest time possible.

The importance of the industrial sector's development for the economic and social development of the Latin American and Caribbean countries points up the urgency of the above-mentioned tasks and the vital importance of the collaboration of UNIDO for the countries of the region.

14. Latin America and the Caribbean have formulated their own response to the problems affecting their countries in the Quito Declaration and Plan of Action and, in this regard, it is recommended that the principles, approaches and measures described in those documents should serve as a basis for the activities of UNIDO in the region and that such activities should be used as an effective tool for supporting the tasks undertaken as a result of those documents.

Annex 1

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