

INSTITUTO LATINOAMERICANO  
DE PLANIFICACION  
ECONOMICA Y SOCIAL



LIMITED  
INST/65  
1 August 1971  
ORIGINAL: SPANISH

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INTERIM REPORT OF THE LATIN AMERICAN INSTITUTE  
FOR ECONOMIC AND SOCIAL PLANNING

1962-1971

I-442-71-S

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1998

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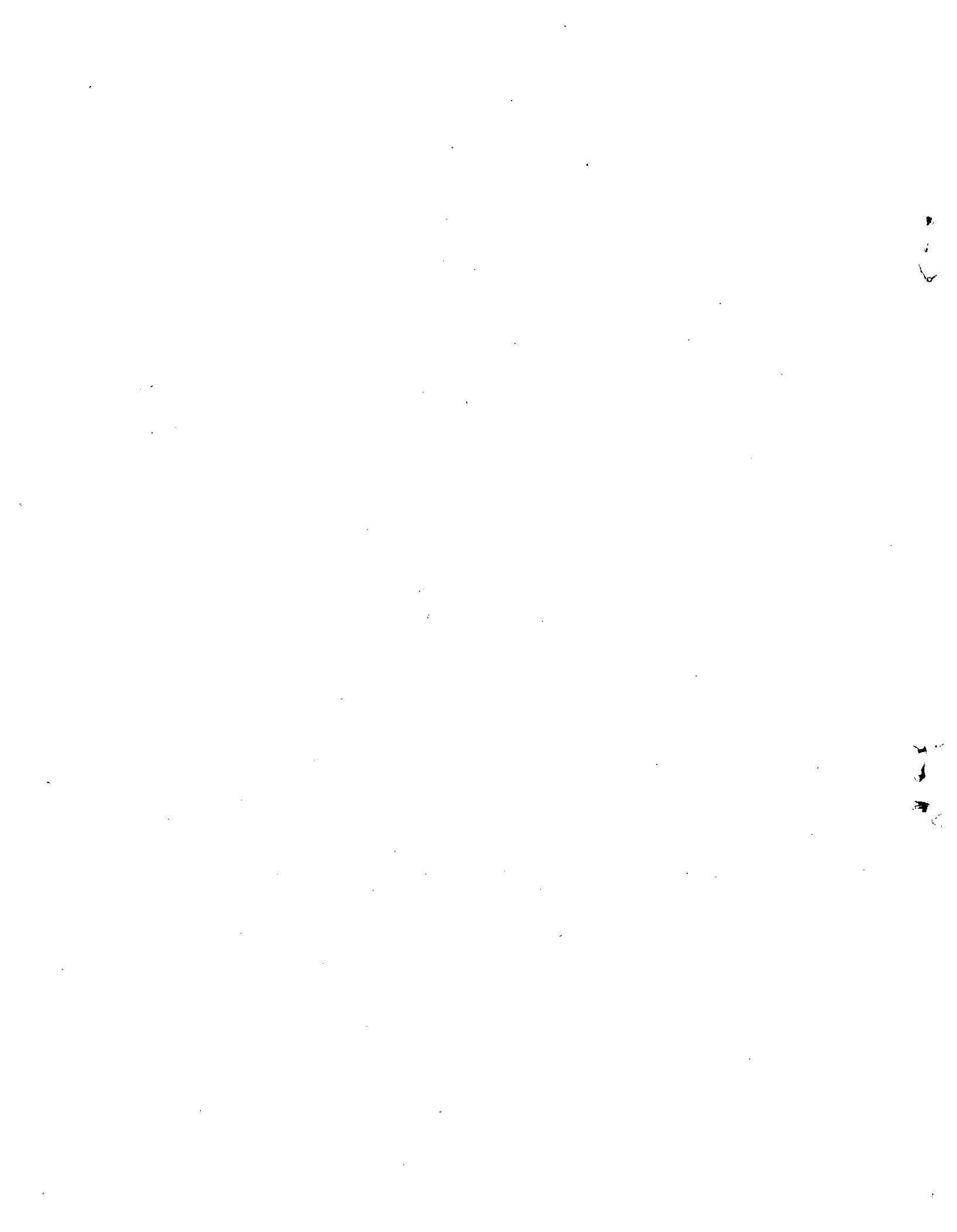
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FOREWORD

In accordance with the provisions of its Plan of Operation (Phase II), the Latin American Institute for Economic and Social Planning, has to submit a report containing an evaluation of the results of its first and second phases, as well as of the supplementary project for the Advisory Services Division, and including information about the arrangements which have been made to ensure the continuing operation of the Institute at an adequate level after the conclusion of Phase II of the project.

An attempt is made in the following pages to summarize—as concisely as possible—and to evaluate the activities of the Institute, and to provide information on the other points considered. This is no easy task, for an account of nine years of intensive work in the Institute's various fields of action would take up a whole book rather than the meagre space afforded by the present document. Moreover, the wealth of information and statistical data supplied in the reports of the Director-General of the Institute to the Governing Council and in those of the Chairman of the Governing Council to the regular sessions of ECLA, together with the Institute documents and publications themselves—with which the United Nations Development Programme (UNDP) is acquainted in their entirety, since they have been punctually transmitted to it—obviate the need for entering into details here. The documents in question may be regarded as a sort of ideal series of annexes to the present report, to which are actually appended others furnishing data and figures deemed to be necessary.



## I. INTRODUCTION

The Latin American Institute for Economic and Social Planning (ILPES) is an autonomous agency created under the aegis of the Economic Commission for Latin America (ECLA) and established on 1 July 1962 in Santiago (Chile) as a project of the United Nations Development Programme (UNDP) and with the support of the Inter-American Development Bank (IDB). It also receives direct contributions from the Latin American Governments—which in many cases have been augmented by reimbursements for services rendered—and from other national, international and private agencies. The main object of the Institute is to provide, at the request of Governments, training and advisory services in Latin America, and to conduct research in various fields of planning and of economic and social development.

### 1. Origin of the Project

At the end of the 1950s, it became evident to ECLA that the secretariat could not meet with its own resources the great demand for training and advisory services voiced by the Governments of member countries. It was absolutely essential to expand ECLA's action in those fields, as was recognized in resolution 199 (IX) of May 1961. In that resolution it was decided to recommend the formation of what was then called an Economic Development Institute, for which the Governments of Colombia, Chile and Venezuela had already submitted a request to the United Nations Special Fund.<sup>1/</sup>

The concrete result of the negotiations conducted by the Executive Secretary of ECLA with the United Nations Special Fund and with other agencies pertaining to the inter-American system was that in February 1962 the States members of the Commission adopted resolution 218 (AC.50), which was amplified and amended in June 1962 by resolution 220 (AC.52), under the

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<sup>1/</sup> The United Nations Special Fund and the Technical Assistance Programme were merged to form the United Nations Development Programme (UNDP) on 1 January 1966.

terms of which the Latin American Institute for Economic and Social Planning (ILPES) was created (for the complete text, see annex 1).

The first Governing Council of the Institute <sup>1/</sup> was elected at a special meeting of the Committee of the Whole on 21 March 1962, and at its first session, held in New York on 7 and 8 June, it adopted the Plan of Operation for the Project which was signed on that same day by the Chairman of the Governing Council, the Director of the United Nations Special Fund, the Secretary-General of the United Nations and the Director-General of the Institute. The duration of the project was fixed at five years.

In 1965, a Plan of Operation for the establishment of the Institute's Advisory Services Division was signed, with the accession of twelve countries which assumed financial commitments. This project--supplementary to the original Plan of Operation--was designed to expand the Institute's advisory services capacity and to make such services compatible with its training and research activities. It was established that the duration of the project should be eighteen months.

Prior to the completion of Phase I, the Governing Council, in a resolution adopted on 17 December 1965, recommended that the Institute's activities be continued and intensified. In May 1966, the ECIA Committee of the Whole took note of the Governing Council's recommendation and endorsed it. In resolution 260 (AC.58), it was recommended to the Governments that they should support any proposals made to UNDP and IDB for financing to ensure the permanence of the Institute, and the two agencies in question were urged to continue to give it their support.

Early in 1967 UNDP and IDB received a report from a special mission they had sent, which advocated the continuance and expansion of the Institute's activities.

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<sup>1/</sup> A list of the Governing Councils which the Institute has had to date will be found in annex 2.



The Plan of Operation for Phase II, which also included provision for the financial participation of Governments on a proportional basis, and a quota of income from services rendered, was signed on 2 June 1967, with the initial accession of ten countries.

## 2. Objectives of the Institute

The original objectives of the Institute--which can be found formally laid down in resolution 220 (AC.52)--were to provide training and advisory services to the Latin American Governments and to undertake research on planning and economic and social development. The aims thus pursued were to raise the technical level of government officials and specialists in the Latin American countries and to assist Governments in establishing and improving their technical institutions and organizations as required for the more efficient programming of their development policy.

These purposes have been served throughout the two phases of the project on the lines briefly reviewed in the relevant section of the present report. It should be stated here and now, however, that apart from its undertakings in its three major areas of activity--training, advisory services and research-- the Institute has devoted great attention, particularly in recent years, to the problems of Latin American economic integration, and has also done work in the field of projects, as well as in connexion with agricultural, industrial, human resources, educational and health planning. Furthermore, towards the close of the first phase of the project a publications programme was established with the aim of disseminating the findings of the Institute's research and preparing practical manuals on planning techniques for use in its own courses and in those of universities and other educational centres in Latin America.

## /3. Financial

### 3. Financial Bases

#### (a) First Phase

The original Plan of Operation, signed on 8 June 1962, provided for a five-year project starting on 1 July 1962. The Special Fund allocation amounted to 3,068,500 dollars. The Inter-American Development Bank (IDB) contributed 1,000,000 dollars, in lieu of Government counterpart, while the Government of Chile's contribution in kind amounted to the equivalent of 120,000 dollars.

In February 1967 an Adjustment Advice was issued in order to adjust the estimated expenditures and to take into account various changes in the work programme of the Institute. The Special Fund contribution was thereby raised to 3,242,238 dollars.

To reflect the actual expenditures of the project, a second Adjustment Advice was signed on 31 December 1968, by virtue of which the Special Fund allocation reached a final figure of 3,253,383 dollars.

In June 1967 a Supplementary Project was established for purposes of financing the Institute's Advisory Services Division, in order to enable the Institute "to develop its advisory services to a level commensurate with its training and research activities". The Special Fund allocation for this supplementary project amounted to 656,800 dollars, of which 526,800 dollars represented the Special Fund contribution, 61,800 dollars the Governments' counterpart contribution in cash and 68,200 dollars the Governments' contribution towards local operating costs.

#### (b) Second Phase

A new Plan of Operation was signed on 2 June 1967, providing funds for a four-year second phase starting on 1 July 1967. The Special Fund allocation for this phase totalled 5,088,400 dollars: 4,288,400 dollars as the Special Fund contribution and 800,000 dollars as the cash contribution by the Governments. Additionally, IDB provided funds amounting to 1,400,000 dollars, and the Governments contributed a further 200,000 dollars through reimbursements for services rendered by the Institute.

/During this

During this phase, the Plan of Operation was amended twice. The first Adjustment Advice was issued to re-set the various Appendices and incorporate into the Special Fund Allocation the 200,000 dollars, which appeared in the original Plan of Operation as the expected cash contribution by the Governments through reimbursement of services, thus bringing the Special Fund allocation to 5,288,400 dollars. The second Adjustment Advice altered the over-all Special Fund allocation as follows: Special Fund contribution, 4,289,424 dollars; local operating costs, 520,000 dollars; counterpart contribution in cash provided by the Governments, 43,000 dollars; expected reimbursement for services rendered, 383,944 dollars. All these sums went to make up a new figure for the Special Fund allocation which amounted to 5,236,368 dollars.

#### 4. Need for a Third Phase

In the UNDP Plan of Operation for Phase II it was laid down that "the Institute is intended to be a permanent body", an intention which had already been expressed in ECLA resolution 220 (AC.52) by virtue of which the Institute had been set up under the aegis of the Commission. The Governments of the States members of ECLA stated at its thirteenth session (see resolution 286 (XIII)) that the functions of the Institute fulfilled long-term needs of Latin America, and urged that the Secretary-General of the United Nations and the United Nations Development Programme should provide the necessary support in order to convert the Institute into a permanent body and to ensure its financing over the long term.

At an informal special meeting of the Governing Council held at Mexico City in September 1969, the future of the Institute was discussed in depth, and the members of the Council requested the Director-General to formulate specific proposals respecting the future activities and financing of the institution. At the meeting of the Council held in January 1970, the Director-General submitted these proposals in document INST/L.18 (see annex 3), and they were approved and fully endorsed by the Governing Council in the resolution adopted at that meeting.

/In April

In April 1970, a joint UNDP/IDB mission, after visiting several Latin American countries and the Institute itself, submitted a report <sup>1/</sup> to the two agencies in which it recommended the establishment of the Institute on a permanent basis, endorsed the proposals of the Director-General, made some suggestions as to changes in Institute's modus operandi, and requested financing for its nucleus of key personnel "at least for the next ten years".

When the ECLA Committee of the Whole met in New York from 4 to 7 May 1970, it adopted resolution 296 (AC.62), in which it urges the Secretary-General of the United Nations to "seek to provide to the fullest possible extent for the continuity and permanence of the Institute, ensuring that it will continue its essential activities in Latin America during the Second Development Decade"; recommends the Latin American Governments to continue to give the Institute increasing support and to include its advisory and project activities in their national technical co-operation programmes under UNDP; requests UNDP to provide the financing required in such a way as to ensure the continued existence of the Institute during the period envisaged above; recommends IDB to continue giving the Institute its financial help and support in the same way as in the past, or by finding the requisite methods of financing those of its activities which may be of common interest; and entrusts to the Director-General of the Institute—together with the Chairman of the Governing Council and in co-operation with the Executive Secretary of ECLA—the task of carrying out the negotiations necessary for the attainment of the foregoing objectives.

At its meeting in February 1971 the Governing Council gave its support to the negotiations conducted by the Director-General with UNDP and other agencies, and at the time of writing the present report, a Plan of Operation for an initial stage of Phase III of the Institute is already in existence, and will be open for signature by the Governments at an early date.

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<sup>1/</sup> See DP/SF/310/REG.106.

Financing for the third phase has been assured by UNDP at about the same level as in Phase II. However, support from IDB for general expenses has been seriously reduced in accordance with a letter, dated 15 October 1970, from the President of the Bank to the Administrator of UNDP. Under the terms of this letter the Board of Directors of IDB authorized the Management of the Bank to propose the continuation of budgetary support to the Institute for a period of two years in lesser amounts. During the first year the amount would be 75 per cent of the support it gave in Phase II and in the second year 50 per cent; in the third year no contribution would be made. The Bank, in making this reduction, suggested a new type of financial relationship in which it would designate the Institute to serve as Executing Agency for projects in its field of competence in countries where the Bank has received requests for assistance.

#### 5. Purpose of the Present Report

The purpose of the present report is to record as briefly as possible the main activities carried out and the results achieved in the first and second phases of the Institute, and the most important work that it is hoped to undertake during Phase III.

## II. ACTIVITIES OF THE INSTITUTE 1962-1971

This section will contain a short description—and up to a point an evaluation of the results—of the Institute's activities in its three main areas of work: training, advisory services and research. It will also show what has been done in respect of projects, integration, agriculture, industry, and other fields of activity. In addition, a few notes will be presented on relations with other international, inter-American and national agencies, together with a summary of the technical meetings which the Institute has sponsored or in which it has taken an active part. Only the most succinct account can be given here; and stress must once again be laid upon the necessity of turning for details of any sort to the reports of the Director-General to the Governing Council and of the Chairman of the Governing Council to ECLA.

### 1. Training

It was in the early 1950s that ECLA first began to give training courses on economic development designed to form Latin American cadres of technical experts, taking advantage of the stock of experience and knowledge it had built up in relation to the problems of the region. When the Institute was established in 1962, it took over this work with a view to extending the courses both in number and in depth. Unquestionably, the training activities carried out through the Basic Course at Santiago, the special courses and the intensive courses which the Institute has held in most of the countries of the region, constitute the most serious effort that has hitherto been made in Latin America to provide teaching in the field of development planning and to encourage study of the subject.

By the end of 1970 the Latin American professionals that had attended the various courses offered by the Institute numbered 5,391 in all (see table 1). In addition to the Basic Course—the core of the Institute's training programme—special courses have been given on educational, health, housing and human resources planning, on annual operational plans and on

/Table 1

Table 1  
 TRAINING PROGRAMME  
 Number of participants  
 (1952-1970)

Specification	1952	1953	1954	1955	1956	1957	1958	1959	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	1970	Total
<b>I. Basic Course a/</b>	10	12	17	8	14	14	19	18	-	61	74	75	68	51	67	62	58	40	-	668
<b>II. Intensive Courses b/</b>																				
(a) Number of participants	-	-	-	80	48	143	136	300	345	258	308	527	269b/	392b/	343	201	326	248	124	4 048
(b) Number of courses	-	-	-	(1)	(1)	(2)	(2)	(3)	(5)	(5)	(6)	(9)	(5)	(8)	(7)	(5)	(8)	(7)	(5)	(79)
<b>III. Special Courses</b>																				
Health Planning																				
Educational Planning																				
Housing Planning																				
Course for Trade Union Leaders																				
Annual Operational Plans																				
Human Resources Planning																				
Regional Planning																				
(a) Number of participants											47	73	77	109	126	63	66	30	84	675
(b) Number of courses											(2)	(2)	(2)	(2)	(4)	(2)	(3)	(1)	(3)	(21)
<b>Total</b>	<u>10</u>	<u>12</u>	<u>17</u>	<u>88</u>	<u>62</u>	<u>157</u>	<u>155</u>	<u>318</u>	<u>345</u>	<u>319</u>	<u>429</u>	<u>675</u>	<u>414</u>	<u>551</u>	<u>536</u>	<u>323</u>	<u>455</u>	<u>318</u>	<u>208</u>	<u>5 391</u>

a/ The Basic Course is held every year at Santiago (Chile).

b/ Not including intensive courses organized by the Institute and subsequently run by national agencies with the Institute's co-operation.

Regional planning.

regional planning, besides a course for trade union leaders. The intensive courses, in their turn, have not only covered general planning and development problems and techniques, but have also dealt with specific questions such as industrial and agricultural planning, over-all programming, trade policy and economic integration, project analysis, programme and performance budgeting, etc., according to demand and interest on the part of the countries submitting requests. It is worth while to point out that today, up and down the continent, many of these thousands of participants in Institute courses hold high-level government, public administration and university posts, and that their influence has had a multiplier effect on the Institute's work. Evidence of this is to be seen in the proliferation of national training activities--which in no small number of instances have enjoyed the help and guidance of the Institute itself--and in the fact that curricula and texts inspired or prepared by the Institute have been introduced by many Latin American universities and other centres of education.

It will be useful to present and briefly discuss a breakdown of the total number of participants in the various courses. Over the period comprising the years 1952 to 1970--with the sole exception of 1960 during the time that training activities were still in the hands of ECLA, and of the year 1970 itself, when the course was suspended for the purposes of studying its reorientation--the Basic Course was attended by 668 professionals (see again table 1). From the figures presented in the table it can be seen how greatly the number of trainees increased from 1961 onwards, in comparison with the few that reaped the benefit of ECLA's pioneer effort in the courses started by Jorge Ahumada.

Seventy-nine intensive courses have been held in all (see table 2 for their distribution among the various countries, which actually number 18, although in several of them courses have been given every year) and by the end of 1970 they had been attended by 4,048 professionals. In the 21 special courses organized (see table 3 for details of those held each year in Santiago and elsewhere), specialized training in the different subjects covered has been received by 675 participants.



Table 2  
INTENSIVE COURSES <sup>a/</sup>  
(1955-1970)

1955	1956	1957	1958	1959	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	1970	Total number of participants
<u>Colombia</u> (80)				<u>Colombia</u> (98)	<u>Colombia</u> (56)						<u>Colombia</u> (44)					278
	<u>Brazil</u> (48)	<u>Brazil</u> (61)	<u>Brazil</u> (64)	<u>Brazil</u> (71)	<u>Brazil</u> (50)	<u>Brazil</u> (49)	<u>Brazil</u> (45)	<u>Brazil b/</u> (162)	<u>Brazil b/</u> (140)	<u>Brazil b/</u> (124)	<u>Brazil b/</u> (137)	<u>Brazil b/</u> (121)	<u>Brazil b/</u> (99)	<u>Brazil b/</u> (101)	<u>Brazil b/</u> (58)	1 330
		<u>Venezuela</u> (82)				<u>Venezuela</u> (66)										148
			<u>Argentina</u> (72)	<u>Argentina</u> (69)												141
				<u>Cuba</u> (62)												62
					<u>Bolivia</u> (124)	<u>Bolivia</u> (41)	<u>Bolivia</u> (38)			<u>Bolivia</u> (60)			<u>Bolivia</u> (32)	<u>Bolivia</u> (38)		333
					<u>Mexico</u> (43)	<u>Mexico</u> (54)	<u>Mexico</u> (25)	<u>Mexico</u> (47)	<u>Mexico</u> (47)	<u>Mexico</u> (52)	<u>Mexico</u> (49)	<u>Mexico</u> (51)	<u>Mexico</u> (31)	<u>Mexico</u> (35)		434
					<u>Uruguay</u> (72)	<u>Uruguay</u> (86)	<u>Uruguay</u> (72)	<u>Uruguay</u> (72)								230
					<u>Ecuador</u> (48)		<u>Ecuador</u> (40)	<u>Ecuador</u> (40)	<u>Ecuador</u> (61)				<u>Ecuador</u> (37)			186
						<u>Paraguay</u> (36)										36
						<u>Peru</u> (78)	<u>Peru</u> (74)	<u>Peru</u> (74)	<u>Peru</u> (46)					<u>Peru</u> (30)	<u>Peru</u> (31)	333
							<u>Central America</u> (60)	<u>Central America</u> (55)	<u>Central America</u> (54)	<u>Central America</u> (32)			<u>Central America</u> (43)	<u>Central America</u> (48)		292
							<u>Dominican Republic</u> (72)			<u>Dominican Republic</u> (78)	<u>Dominican Republic</u> (31)					181
													<u>Chile</u> (64)			64
80	48	143	136	300	345	258	308	527	269	392	343	201	325	248	124	4 048

<sup>a/</sup> Not including intensive courses held at the national level, on the responsibility of the governments alone. <sup>b/</sup> In Brazil, three intensive courses have been held every year since 1963.

Table 3

TRAINING PROGRAMME

Number of participants in special courses

(1962-1970)

	1962	1963	1964	1965	1966	1967	1968	1969	1970	Total
Health Planning	20	35	34	37	37	30	25	30	30	278
Educational Planning	27	38	43	72 <sup>a/</sup>	34 <sup>b/</sup>	33	-	-	-	247
Housing Planning	-	-	-	-	31	-	-	-	-	31
Economic Development and Planning, for Trade Union Leaders	-	-	-	-	24	-	-	-	-	24
Annual Operational Plans	-	-	-	-	-	-	13	-	-	13
Human Resources Planning	-	-	-	-	-	-	28	-	28	56
Regional Planning	-	-	-	-	-	-	-	-	26	26
<u>Total</u>	<u>47</u>	<u>73</u>	<u>77</u>	<u>109</u>	<u>126</u>	<u>63</u>	<u>66</u>	<u>30</u>	<u>84</u>	<u>675</u>

a/ Held at Buenos Aires, and attended by 72 trainees from 18 Latin American countries, including 46 Argentinians.

b/ Held at San José (Costa Rica), and attended by 94 trainees from the five Central American countries and from Panama and the Dominican Republic.

/In annex

In annex 4 will be found a list of the special and intensive courses given by the Institute, which includes those currently under way and programmed for 1971.

The activities involved in each case have been reviewed in the reports of the Director-General to the Governing Council, half-yearly at first, and more recently once a year.

Alongside the courses proper, the Institute has done much in the way of collaboration with the universities and other educational centres. Its co-operation has sometimes taken the form of orientation and reorganization of teaching systems in Schools of Economics, while on other occasions members of the Institute's teaching staff have taken part in university courses. Special mention should be made of the work undertaken in the Universidad de Concepción (Chile), the Universidad del Uruguay and the Universidade de Campinas (Brazil). The lending of staff to the Universidad de Chile has been organized on a systematic footing, and courses have been given in other academic centres in the region. Among the most recent are those held at the Universidad del Sur in Bahia Blanca (Argentina) and at the Instituto Politécnico de México. The Director-General of the Institute has just given a course at Columbia University (New York) on Latin America's economic problems.

The contribution made by the Institute in the field of training fulfils one of the central purposes for which it was established, and has signified a response to Latin America's crying needs in this respect. Although big gaps still remain to be filled, it is satisfactory to note that in most of the countries the situation is very different from what it was in the past, and in many of them a sustained and well-directed effort is being made to remedy the existing deficiencies.

In 1969, at the informal special meeting of the Governing Council to which reference has already been made, the foregoing facts were noted and discussed, and the conclusion was reached that the Institute courses had now largely attained their objective in respect of this first essential stage of basic training in planning and development. Without shelving that function altogether--especially where the special courses were  
/concerned, and

concerned, and the satisfaction of the ever-increasing demand on the Governments' part for intensive courses on specific and methodological aspects of sectoral planning--the Institute should, it was felt, embark upon a new phase of training activities.

This was why in 1970 the decision was adopted that as regards the Basic Course--the reorganization of which had for some time past been under consideration--<sup>1/</sup>the Institute should make what has been described as a pause in its teaching work, which would afford it an opportunity of taking the first steps towards new training procedures. This involved systematizing the existing knowledge of Latin America's situation and problems and probing them more deeply, as well as reviewing the work done so far and criticizing it from within.

The upshot was that in June 1971 the Institute's original Basic Course was replaced by the new Course on Development and Planning, the prospectus of which is presented in annex 5. It was organized on the lines indicated after an interpretative analysis had been made of the type of problems and circumstances attendant upon planning in the Latin American countries, and research had been conducted by the Institute and other agencies on various aspects of the region's development process.

The new approach is based on recognition of the fact that one of the fundamental handicaps affecting the efficacy of planning is its inadequate linkage with the circles responsible for policy decisions. In the treatment of the subject, therefore, thorough coverage must be given to the features and trends of development and to the stumbling-blocks that impede its progress, so that planners may adapt their techniques to these problems and take them into account in their work, and may collaborate more efficiently in their respective countries in the adoption of economic and social policy decisions. The scope of the course will be supplemented and expanded by a number of seminars at which various Latin American development problems will be discussed.

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1/ See Bases de la reorientación del Programa de Capacitación (INST/L.14), a document presented to the Governing Council at its twelfth session (Mexico City, December 1968).

/This will

This will be a means of enriching the teaching received by the participants, especially as they will be taking part in the Planning Seminar which the Institute has for some months been engaged in organizing.

This Seminar will be the first of a programmed series of meetings at which Latin America's problems and experiences will be discussed from widely varying angles and in relation to different topics. The aim is to promote extensive, objective and open dialogue with other circles inside and outside Latin America, so that points of view can be compared—a proceeding for which there is an increasingly urgent need. These seminars will bring together Latin American and non-Latin American economists, sociologists and other specialists, as well as officials concerned with economic policy and planning activities in their respective countries, so that the subjects of discussion may include not only theoretical and academic ideas, but also the views of those who have to take practical action in respect of policies for dealing with development problems.

Hence it can be seen that during the latter part of Phase II, the Institute's action in the field of planning—without prejudice to the intensive and special courses, which have been kept up during this period and will be continued in the future—has been poised between the interpretation, reconsideration and reorientation of its past work in relation to the Basic Course, and the launching of the new course and the seminars now being organized and planned, which will give a new dimension to its activities in this field, and cast them in a different mould.

Lastly, a point worth mentioning is that several of the texts used in the courses have been published in book form in the series entitled "Apuntes de clase" (class notes), included among the Institute Cuadernos (see annex 8). It may also be repeated that many of these publications have been adopted as textbooks in a number of Latin American universities and educational centres.

## 2. Advisory Services

At the beginning of the 1960s, direct advisory services to countries in the field of planning were in the hands of interdisciplinary advisory groups jointly formed by ECLA, the Organization of American States (OAS) and the Inter-American Development Bank (IDB). In 1962, the Institute initiated the advisory activities it had been requested to undertake, partly by supporting the above-mentioned advisory groups, and by giving other countries direct assistance in establishing their institutional organizations and assimilating the techniques and methods required for more efficient economic development planning.

As economic and social development planning techniques spread throughout Latin America, there was a rapid increase in demand for advisory services in connexion with assistance to Governments in plan formulation and implementation. In 1965, to meet this demand, the Institute set up its Advisory Services Division in order to co-ordinate all activities of this type.

Advisory services were at first focused on the preparation of medium-term plans, public investment programmes, programme and performance budgeting and administration for development, or, in other words, on the application of medium- and short-term planning techniques and the creation or improvement of institutional machinery at the national level.

As a result of the experience acquired in field work, the so-called integrated planning systems were gradually developed. Basically, they comprised development strategies, medium-term plans and annual operational plans.

According to this line of thought, development strategies should be formulated with the aim of creating an image of the future, while at the same time their viability should be taken into consideration, but without the political, institutional, legal and formal limitations inherent in a short-term approach. The work on national strategies has constituted a significant contribution on the Institute's part, since it represents an endeavour to analyse each country's basic problems and potentialities, not

/only within

only within the national framework, but taking a broader view and mapping out long-term objectives. In other words, on the basis of the existing situation, a time schedule of measures and policies is drawn up, on lines consistent with the attainment of the objectives established.

It must be made clear that the Institute's task in this field has been to place research methodologies and techniques at the countries' disposal while of course leaving responsibility for the content and scope of strategic objectives and targets in the hands of the Governments concerned.

Advisory assistance in respect of development strategies has been provided to the Dominican Republic, Peru, Paraguay, Venezuela, Ecuador, and Bolivia and, at a regional level, to Central America and the Andean Subregion (see annex 6). Work on strategies has also been done in connexion with specific areas in selected countries, such as the Norte Grande and the Norte Chico in Chile, the Andean area and its zone of influence in Venezuela, and the banana-growing region of Ecuador. Lastly, the Institute has collaborated in the formulation of strategies for states or provinces in certain countries, an outstanding case in point having been its co-operation with the State of Minas Gerais in Brazil.

The activities stemming from the strategies in whose formulation the Institute has taken part have furnished it with valuable background material for a more realistic reinterpretation of Latin American development, founded, on direct knowledge of the countries' situation and needs. Furthermore, the countries themselves--especially the members of the Andean Group--now possess the requisite bases for the analysis of integration objectives and prospects.

In the early 1960s, the Institute's advisory services in connexion with medium-term plans were focused on their formulation. During the last five years these activities have brought to light the need for close linkage between medium-term plans and development strategies and annual operational plans. Mention may be made, inter alia (see again annex 6), of the advisory services provided in Uruguay, Peru, Paraguay, Chile, Colombia, Brazil, Central America and the Dominican Republic.

/With respect

With respect to annual operational plans—the final link in the chain forming an integrated planning system—the Institute has assisted countries to improve their budget systems by introducing new methods of budget programming, with the aim of co-ordinating development plans with public budgets. In one way or another, advisory services in this field have covered almost all the countries of the region (see again annex 6).

Since 1966, progress has been made in the integration of public budgets in annual operational plans as basic instruments for the implementation of medium-term plans, and as a framework to ensure the consistency of short-term systems and policies.

In this connexion, special emphasis is laid on the interdependence of short-term planning instruments through their integration in what is termed the Annual Operational Plan. The economic budget is thus treated, as a means of ensuring the compatibility of the various components of the annual plan: the monetary budget, the foreign trade budget, the public sector budget (general government and State enterprise budgets), sectoral and regional budgets, projected balances of human and material resources, etc. In other words, the aim is to integrate the decisions adopted in the major areas of development-oriented economic policy.

Similarly, special attention is devoted to the existing links between the public and private sectors, both as regards the impact of basic economic policy measures (taxation, prices, wages, employment) and in relation to direct or indirect action taken by the public sector to stimulate investment and/or production in the private sector.

Basically, collaboration in annual operational plans has been undertaken in Bolivia, Peru, Honduras and Chile, and in important experiments in over-all handling of the integrated planning system, as in the case of the State of Minas Gerais.

Under an agreement signed with the government of this Brazilian State, the Institute has had the opportunity of collaborating in the application of an integrated planning system: strategies, medium-term plans and annual operational plans, together with adjustment of the institutional machinery.

/While dealing



While dealing with the integrated planning system, the Institute has at the same time co-operated in the formulation of concepts relating to the organization of planning and implementation machinery: the establishment of planning and budget offices, new Ministerial structures, organization of basic sectors such as industry and agriculture, etc. Activities worth mentioning in this connexion include, inter alia, those carried out in Bolivia, Peru, the Dominican Republic and Chile (see again annex 6).

In recent years, as the fruit of its experience in the field, the Institute has been developing the idea of operational systems, which represent a response to the lack of co-ordination and the dissipation of functions observable in several public sectors in Latin America. Such systems--which may be over-all, sectoral or regional--serve to establish the areas of action and dependence of the various public-sector agencies concerned with activities of one and the same kind. For example, the operational system for the agricultural sector embraces the functions, activities and organization of the public sector at the levels of determination of planning policies, establishment of norms, regulations and controls, and implementation of measures, as well as all its relations with private-sector units.

By means of this system, sectoral responsibilities are very clearly demarcated, and its application as a method of diagnosis and analysis makes it possible to pinpoint any dissipation of institutions and functions that militates against satisfactory programming, co-ordination and direction. Thus, an integrated outlook replaces the formal attitude of rationalizing patterns of organization, methods and procedures which are meaningless from the standpoint of the sector as a whole.

Activities based on this approach have been undertaken in Peru, Guatemala, Bolivia, Chile and Brazil (State of Minas Gerais).

/During the

During the period 1965-1969, the Institute provided permanent and continuing advisory services to the Government of Chile in respect of agricultural planning.

The main activities in which this advisory assistance was given included the preparation of the agrarian reform bill which was subsequently passed by parliament; the formulation of the Agricultural Development Plan for 1965-1980; the restructuration of the agricultural public sector, including the organization and operation of a sectoral planning system with the active participation of about 300 professionals; and the designing and launching of a system for the formulation and execution of the projects that formed part of the Plan.

Unquestionably, one of the significant results of the Institute's advisory activities has been and still is the preparation of manuals, methodologies and studies on planning techniques and on Latin American experience in this field. Special mention may be made of the work done in connexion with development strategy, planning and programme and performance budgeting, annual operational plans, public enterprise budgets and operation of public-sector plans (see annex 8, listing Institute publications and documents).

Lastly, stress should be laid on two important points: (a) the experience acquired through the advisory services has been turned to account in training activities, both those carried out in the course of field work and those undertaken in the Institute programmes or by other national or international agencies; and (b) this same experience has given occasion for the interdisciplinary participation of technical experts from the Institute and officials of the countries with which the Institute has co-operated.

### 3. Economic Research

The research work which has been carried out in several fields since the establishment of the Institute in 1962 can be classified under the following group headings: (a) research on economic development problems

/and policies

and policies in Latin America, with the object of completing and progressively improving a body of basic ideas calculated to assist countries in the task of defining their development policies; (b) studies aimed at completing and improving planning instruments and methodologies, in particular with respect to short-term plans and questions relating to development plan implementation; (c) research for the purpose of preparing a set of texts that can be used for professional training in the sphere of development and planning.

Before these research activities are reviewed, a study whose peculiar significance and intrinsic originality mark it out for special mention is the report entitled Change and Development. Latin America's Great Task (Transformación y desarrollo. La gran tarea de América Latina), which was prepared at the request of IDB by Mr. Raúl Prebisch, in his capacity as Director-General of the Institute and with the collaboration of its technical experts. This document was presented at the Assembly of Governors of the Bank that was held at Punta del Este (Uruguay) in April 1970, and the final Spanish text was published in Mexico at the end of the same year by the Editorial Fondo de Cultura Económica. In October 1970 the Institute headquarters in Santiago was the venue for a seminar convened by IDB to provide an opportunity for eminent figures from Latin America, the United States and Europe to discuss the views upheld in the study.

The international impact of the report has been such that it has been published in several languages already, and is very shortly to appear in Dutch and Japanese. It is beyond the scope of the present document to analyse the content of the Prebisch Report, of which the second volume --containing the technical studies on which the first is based--will be issued at an early date by the publishing house referred to above.

Research concerning development problems and policies has been focused on certain topics of major importance. Particular attention has been devoted to the external sector and its linkage with the operation of the region's economies, with the economic structure and with the development process. The list of publications and documents given in annex 8 includes

/several studies

several studies in this field. One of these, La brecha comercial y la integración latinoamericana,<sup>1/</sup> discusses in detail the ways in which Latin America's external sector has hampered its economic growth, relating them to certain essential characteristics of the industrialization process as it developed in the past and has been evolving in recent years. A number of studies were also carried out in co-operation with ECLA for presentation at different sessions of the Commission in 1969 and 1971. One of them was concerned with the trade and domestic savings gaps and structural unemployment in Latin America, and another with macroeconomic projection for the 1970s, covering several of the Latin American countries.<sup>2/</sup>

In the same line of research, the possibilities of solving the problems of external constraint and shortage of savings in Latin America's development process were analysed from the technical standpoint. The resulting study served as the basis for some of the views propounded in the above-mentioned report.

In addition, a study was carried out in greater depth on external-sector problems in the group of countries forming the Central American Common Market, and was presented at the second session of the United Nations Conference on Trade and Development (UNCTAD) (New Delhi, 1968).<sup>3/</sup>

In the study on the trade gap and Latin American integration referred to above, consideration was given to the possibilities opened up by the integration movement for relieving the external-sector bottleneck, building up a sounder and more effective structure of production, and developing basic industries in satisfactory conditions.

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1/ Published as one of the Textos of the Institute by Siglo XXI Editorces (México, 1967).

2/ See documents E/CN.12/831 and E/CN.12/865, and the addenda thereto.

3/ See "Central America: analysis of the external sector and its relation to economic development", in Trade Prospects and Capital Needs of Developing Countries (TD/34/Rev. 1) (United Nations publication, Sales No: I.68.II.D.13).

On this same topic, as will be shown later,<sup>1/</sup> studies specifically relating to the Andean Group were also undertaken at the request of the Board of the Cartagena Agreement. Other integration studies of which mention may be made include "Economic Integration and Development Plans: Progress and Problems", a paper presented at the Third Interregional Seminar on Development Planning, which was organized jointly by the United Nations Centre for Development Planning, Projections and Policies, ECLA and the Institute, and was held at Santiago (Chile) in March 1968; and La relación de las políticas y planes de desarrollo con la integración económica, issued as part of a document prepared by the Institute for Latin American Integration (INTAL).

Another group of problems which have been the object of special attention in recent years comprises those of employment, income distribution and economic marginality. The aim of the relevant studies has been to analyse the Latin American development patterns that systematically conduce to insufficient productive absorption of manpower; and their findings are set forth in a document dealing with the question of integration-oriented development policy and entitled Elementos para la elaboración de una política de desarrollo con integración para América Latina.

The Institute has also examined the links between population problems and development. Research in this field has covered the relations between levels of living and education and between fertility rates and the participation of women in the labour market (see again annex 8), and has included an analysis of the changes undergone by certain demographic variables in the course of the development process.

With respect to short-term programming and plan implementation, several studies have been carried out and the resulting publications and documents issued. One of the main areas of activity has been that

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<sup>1/</sup> See section II.5 of the present report.

of short-term monetary and financial programming. An attempt has been made to shed light on some of the most important relationships between monetary and financial policy and its short-term manipulation and the medium- and long-term objectives established in development plans. The Institute organized two seminars in which it brought together a skilled group of experts with wide experience in the formulation and application of monetary and financial policy, and a group of planners concerned with medium-term problems. From these activities stemmed a publication in the Cuadernos series entitled La programación monetario-financiera en su relación con el desarrollo económico, and a bulky volume which will appear as one of the Institute Textos at the end of 1971, and which includes the papers on experiences in different countries that were presented at the seminars, preceded by a summary of the main conclusions to which the discussions led. In addition, thanks to the co-operation of the Government of the Kingdom of the Netherlands, a study of Uruguay's experience in respect of monetary and financial programming was carried out in 1970 in collaboration with the Universidad de la República del Uruguay. This study, a provisional text of which is in course of preparation, may generate conclusions of interest not only to Uruguay but also to other Latin American countries.

In co-operation with the Banco Central de Chile and the National Planning Office (ODEPLAN), tables of sources and uses of funds were drawn up to serve as instruments for analysis and programming in the monetary and financial area in Chile.<sup>1/</sup>

One of the Institute's most important modus operandi in the field of research has consisted in co-operation with national and international agencies. In many of the research projects mentioned it has collaborated with IDB and the Latin American Demographic Centre (CELADE). Others referred to in various sections of the present report have been undertaken

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<sup>1/</sup> See Estudio de fuentes y usos de fondos. Chile 1960-1964, recently published by the Government of Chile.

/jointly with

jointly with the International Labour Organisation (ILO), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Food and Agriculture Organization of the United Nations (FAO), Resources for the Future and the Ford Foundation.

The Institute's close and constant collaboration with ECLA deserves special mention, as does also the co-operation maintained with the United Nations Centre for Development Planning, Projections and Policies, with UNCTAD and with the Board of the Cartagena Agreement. Furthermore, stress must be laid on the highly positive results obtained from co-operation with national research centres, by means of which it has been possible in the case of some Latin American countries to deal with several of the topics mentioned above at the national level. This type of collaboration has been based on co-ordination with the Latin American Council of Social Sciences (CLACSO), of which most of the social science research centres in the Latin American countries are members. The Institute has co-operated chiefly with the Economic Research Centre of the Torcuato di Tella Institute (Argentina), the Centre for Statistical and Mathematical Studies of the Universidad de Chile, the Centre for Economic and Demographic Studies of the Colegio de México, the Universidad Nacional de Ingeniería of Peru and the Centre for Development Studies (CENDES) of the Universidad Central de Venezuela. It has also collaborated intensively with the IDB Institute for Latin American Integration (INTAL) and with the Catholic University of Tilburg (The Netherlands).

#### 4. Social Development Programming

From the very outset, the Institute has pursued clearly-defined objectives in relation to social development programming, and has carried out various research programmes. These objectives have always, of course, been harnessed to the Institute's more general aims, since the demands of its training programmes, its advisory services and its research targets have had to be taken into account.

/Sociologists have

Sociologists have taken part in each and all of the Institute's training activities. Concern with sociological questions has come to represent an increasingly important element in the Basic Course. Nor has the collaboration in question been confined to Santiago; it has extended to numbers of intensive courses given outside Chile. No less significant a contribution has been made in the special courses, particularly those on health and education. In this last instance, collaboration was very close during the period covered by the agreement with UNESCO on the joint organization of educational planning courses, and was reflected in published works (see annex 8).

Advisory services in the social field have never been able to cover as much ground as could be wished, owing to the perennial problem of shortage of resources. At all events, in response to requests from the United Nations Children's Fund (UNICEF) with which organization the Institute maintains a programme of collaboration, advisory assistance in respect of problems relating to children and youth has been given in several countries, including El Salvador (1965) and Colombia and Paraguay (1969). The Institute has also participated in interdisciplinary missions for the purpose of formulating development plans in Peru, first in 1968 and now again in 1971.

The object of most of the missions referred to has been to provide assistance merely in relation to strictly social problems, with special emphasis on those affecting children and youth, in accordance with the terms of the agreement with UNICEF. In the last few years, however, the necessity of including sociologists in multidisciplinary missions to cooperate in the formulation of national and regional development strategies and plans has become increasingly apparent. Experience has shown that the sociologist can pay an outstandingly useful part.

Research has certainly been the core of the Institute's activities and objectives where social questions are concerned, since this was the field to which least attention was being devoted in planning activities in Latin America. It should be recalled in this connexion that the

/Institute has



Institute has been, up to a point, the successor to ECLA, which in earlier years had undertaken sociological studies that had a powerful impact among intellectual circles in Latin America. For example, the document presented at the tenth session of ECLA (Mar del Plata (Argentina), May 1963), under the title of "The Social Development of Latin America in the Post-War Period" (E/CN.12/660), is still a valuable point of reference for research in this field. Accordingly, the Institute's research programme has been steadily maintained. Its story can be briefly told as follows: in the first place, it was formulated in analytical outline in the document entitled Las condiciones sociales del desarrollo económico, secondly, a programme of specific research was drawn up at a meeting sponsored by UNESCO and held in Mexico in December 1960, and appears in the corresponding publications; and, thirdly, a research programme was presented at the Mar del Plata session, as shown in the relevant Report of the Director-General of the Institute to the Governing Council.

Experience suggests that all the sociological research centres founded in recent years divide their work into three major categories: (a) basic research, which is in principle purely theoretical and is carried out irrespective of the practical results which it may and in the last analysis always does produce; (b) studies of the contemporary social structure of the country concerned, which are, of course, studies in theoretical interpretation, but have more or less immediate practical implications; and (c) studies on practical action relating to the areas where social problems are most acute and call for the application of immediate measures. It would not be impossible to classify the work proposed for the Institute's Social Planning Programme in accordance with this general consensus on the part of the sociological research centres. There can be no doubt, for example, that the research on social planning theory falls, for the time being, under the head of basic research. Most of the research projects, on the other hand, belong to the category of studies of the contemporary social structure--of Latin America in this case. And some of the remainder, like other Institute activities, have their place in the third group, covering the areas of conflict which are of most pressing concern today.

/Of course

Of course, rich and precise as is the content of these various programmes, the Institute has been in no position to implement them in their entirety; but it may be recalled without presumption that their formulation has exerted so strong an influence in intellectual circles in Latin America that they have been largely put into effect through the work of other Latin American research centres.

There are two things that must be noted in this connexion: the place of dialectic in the work done by the Institute under its own programmes, and its role as a clearing-house in Latin America's research activities. With regard to the first point, strong emphasis must be laid on the way in which the Institute has balanced its attention between concrete and functional types of research and the more general quest for over-all historical interpretations of the socio-economic situation in Latin America.

Respecting the second point, the Institute, aware of its own financial and staffing limitations, has made every effort to establish contact with other Latin American or international research centres, thus endeavouring, to some extent successfully, to act as a clearing-house for development sociology in Latin America.

The Institute has been in touch with the Universities of Paris and of Berlin and has collaborated with them in their research on Latin America; similarly, an agreement was concluded with the Ford Foundation and DESAL for the conduct of joint research on the important subject of marginality, but could not be implemented for reasons beyond the Institute's control.

A considerable proportion of the Institute's activities in this field stems from the above-mentioned agreements with UNICEF. This United Nations agency has been and still is giving the Institute generous assistance in its work. The two principal dimensions of the task undertaken in conformity with these agreements have consisted in the seminars, on the one hand, and, on the other, the studies on youth. The UNICEF seminar held at Santiago in 1965 marked a significant milestone in the agency's thinking, and the Institute's contribution to it was of decisive importance.

/A seminar

A seminar on development problems and social programming is to be held in Santiago in October 1971.

The first of the series of studies on youth, which considered theoretical aspects of the topic,<sup>1/</sup> was followed up by empirical research on marginal youth in Chile, El Salvador and Peru, the findings of which are in course of publication under the title Estudios sobre la juventud marginal latinoamericana. In addition, a study carried out in Ecuador will be published later.

Although all the studies prepared are listed in annex 8, it is worth while to note the basic topics dealt with in the past few years: research on social groups of interest, such as industrial entrepreneurs and workers, the lower-income urban sectors and youth groups in selected Latin American countries; analysis of the status and prospects of certain institutions such as the educational and political systems and, to a lesser degree, the family; over-all studies on the social structure of a specific region or country; syntheses of existing sociological research on Latin America, designed to provide a global picture of the region's historical evolution; and theoretical analyses of the relation between economics and sociology in the light of development problems and planning.

##### 5. Economic Integration of Latin America

The Institute has devoted unflinching attention to the problems connected with the economic integration of Latin America, as is testified by several of the studies which it has prepared and published in the course of recent years, and which are mentioned elsewhere in the present report.<sup>2/</sup>

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<sup>1/</sup> For the study in question, see José Medina Echavarría, Filosofía, educación y desarrollo, Textos del ILPES (Siglo XXI Editores, México, 1967), p. 237.

<sup>2/</sup> See section II.3 and annex 8. For a comprehensive survey of the Institute's activities in connexion with the Latin American integration process, see the annex to the report to the Governing Council for 1970.

/Furthermore, integration

Furthermore, integration has been among the subjects dealt with in the training courses, and in some of the intensive courses--notably those held in Central America--a definitely integracionist approach has been adopted.

But over and above these teaching activities and the aforesaid studies and research--of which a considerable proportion has been carried out in collaboration or in close contact with integration agencies such as the Latin American Free-Trade Association (ALALC) or the Permanent Secretariat of the General Treaty on Central American Economic Integration (SIECA), or with institutes specializing in this field, such as INTAL--there is a concrete fact to be recorded: the Institute, together with ECLA, which did so much in the 1950s to foster the idea of integration in Latin America, has always concerned itself with the actual integration process, first through the Central American Common Market, and subsequently during the formation of the Andean Group, which became a fait accompli in 1969 with the signing of the Cartagena Agreement.

As regards Central America, mention has already been made of the study published by UNCTAD.<sup>1/</sup> In 1966 and 1967 the Institute collaborated with SIECA in the preparation of a long-term strategy setting forth various development options for the area based on the integration process under way. To that end, the striking impetus given by the Common Market to the economic growth of the area was balanced against the new problems that had arisen along the road, including, inter alia, over-concentration of inter-Central American trade in two of the five countries, the slow progress of industrial projects classified as of strategic importance, and the inadequate role assigned to the agricultural sector in the integration process. The strategy for Central America drawn up in the years referred to may be found in the document submitted to SIECA.<sup>2/</sup>

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<sup>1/</sup> See above, section II.3 on "Economic Research".

<sup>2/</sup> See "Bases para una estrategia centroamericana de desarrollo" (mimeographed text).

The Institute—as can be seen from the lists of advisory missions and projects presented in annexes 6 and 7—has continued to comply with a variety of requests formulated by the Central American Governments. Some of the missions specifically tackled integration problems, but even those whose object was to deal with purely national questions invariably sought to work on integration-oriented lines within the frame of reference of Central America as a whole.

From the outset the Institute, in conjunction with ECLA, has very closely followed the Andean countries' subregional integration movement. In August 1968, at the request of the Joint Commission of the Declaration of Bogotá, a programme of work on linkage between national development plans and the integration process of the countries signatories to the Declaration of Bogotá (Programa de trabajo sobre las vinculaciones entre los planes nacionales de desarrollo y el proceso de integración de los países de la Declaración de Bogotá) was submitted to the session of the Joint Commission held at Cartagena (Colombia).

In October 1969, when the chiefs of planning offices of the countries members of the Andean Group met at Lima (Peru), they requested the ECLA secretariat and the Institute to prepare a study on criteria and methods for joint programming and on the industrial potential of the subregion, giving due weight to the comparative advantages of the various countries and to the balanced development of the area. This study was presented in May 1970,<sup>1/</sup> at the Second Meeting of Chiefs of Planning Offices.

Since the Board of the Cartagena Agreement was established at Lima in 1970, it has kept in close and constant touch with the Institute and the ECLA secretariat, and has concerted a co-operation agreement with the two agencies which has the support of UNDP. To pursue these activities, which are of special importance for the integration of the Andean subregion,

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1/ See Criterios y posibilidades de desarrollo industrial y planificación conjunta.

and others relating to inter-area co-operation and a future Latin American common market, a Joint ECLA/INSTITUTE Programme for Latin American Economic Co-operation has been organized and placed in the hands of the Deputy Director-General of the Institute.<sup>1/</sup>

## 6. Projects

Roughly speaking, the Institute's activities in respect of projects have been oriented in two directions. On the one hand, it has undertaken theoretical and practical research on various subjects, the findings of which have already found expression in published works (see annex 8) and in the preparation of a guide to project formulation and a handbook for project-designers; and on the other hand, advisory services have been provided to various Latin American Governments. The guide was prepared under an agreement with IDB, and is to be submitted to the Bank for final consideration in September 1971. When published, it will undoubtedly serve as an operational instrument that will guide the formulation of different types and categories of projects at the stage of drawing up the feasibility study or the definitive draft project. The handbook for project-designers has more wide-ranging objectives, being aimed at meeting an obvious need to rationalize the allotment of resources to economic development projects in Latin America.

The Institute has also carried out several technical studies in this field, relating, inter alia, to preinvestment; control of project execution by the critical path method (PERT); integration projects, welfare and project evaluation; project formulation, etc.

With respect to advisory assistance in connexion with projects and preinvestment, the various missions undertaken by the Institute from 1963 to 1971 are enumerated in annex 7 of the present report. Some of them were carried out in conjunction with IDB and FAO.

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<sup>1/</sup> For a comprehensive review of the work done to date, see Informe de actividades en el primer semestre de 1971 (INST/64). See also the programme of work and performance budget for 1971 (INST/L.22) (Spanish only).

## 7. Industrial Planning

In view of the priority it assigned to its work on industrial planning, the Institute set up a specialized unit which has since become one of its Divisions, operating in all three of the Institute's basic fields of activity, training, advisory services and research. Industrial planning was introduced as one of the specialties covered by the training programme. To that end, concurrently with the teaching on the subject given every year in the Basic Course at Santiago and in some of the intensive courses held in various countries, a number of research projects had to be carried out, mainly relating to industrial development problems in the Latin American countries. These studies were crystallized in a book,<sup>1/</sup> as well as in a good many documents, some of which have been published in the Institute's Cuadernos series (see annex 8). In the course of time, the research undertaken and the experience deriving from the provision of advisory services have gradually enriched the content of the specialty, which is always open to changes for the better from year to year. To begin with, planning techniques took a pre-eminent place; they were followed by the long-term objectives or image of industry, and now the primary concern is the handling of industrial policy. This does not mean that teaching on techniques and objectives has been discontinued; on the contrary, it has been given in the context of the management of institutions and instruments to complete an operational system of industrial planning.

The specialty has constituted a veritable pivot for the construction of the research programmes and the strengthening of the advisory services in which the Division has been taking part. The greater share of effort, however, has been expended on research, both in the field of planning and in that of industrial development strategy and problems: structure of production, employment, technology, external relations and integration.

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1/ See Héctor Soza Valderrama, Planificación del desarrollo industrial, Textos del ILPES (Siglo XXI Editores, México, 1966).

Advisory activities, undertaken on occasion in support of those of the Advisory Services Division, have expanded lately both in some of the individual countries--in particular, Mexico--and at the regional level. Advisory assistance is being given to the Andean Group, especially in connexion with industrial development strategy.

#### 8. Agricultural Planning

The Institute set up an agricultural planning unit not only in order to offer this special subject in the training courses, but also to undertake research work and advisory activities. For this purpose, it enjoyed the co-operation of the ECLA secretariat, which lent it a high-level agricultural economist, and of FAO, a number of whose technical experts were assigned to Santiago. For several years the agricultural planning unit, over and above the necessary teaching in the Institute's Basic and intensive courses, devoted its energies to the preparation of a comprehensive manual on agricultural planning in which methodological problems are discussed in depth and various programming techniques are analysed. A provisional text of the manual, which consists of five sizeable volumes, had been completed by 1969 and was undergoing technical revision in preparation for its publication, when ECLA and FAO were obliged by their own needs to recall their economists. The Institute's other agricultural specialists, engaged as they were in the provision of advisory services to various Governments--including that of Chile, with which they were collaborating as described elsewhere<sup>1/</sup>--were unable to complete a final version of the manual. The material contained in it, however, has continued to be used in the training courses, and copies of it have been distributed--with the reservation that they are provisional texts only--to several Ministries of Agriculture at their request.

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<sup>1/</sup> See section II.2 above: "Advisory Services".

/Thus there



Thus there has been an intermission in the Institute's agricultural research work, and up to now its publications have included no Textos or Cuadernos in so important an area of study. This gap will shortly be filled, as an Agricultural Planning Division has been established almost at the close of the second phase. In the broad programme of activities which has been drawn up, and which is to be found in the programme of work and performance budget for 1971,<sup>1/</sup> very high priority is given to the task of bringing up to date the material and experience acquired by the Institute in the past few years and preparing a manual on agricultural planning, the need for which requires no emphasis.

#### 9. Other Activities

##### (a) Natural Resources

The Institute has shown interest from the start in a field of such vital importance as this for economic development, and has incorporated the subject in its training courses and seminar discussions.<sup>2/</sup> An agreement concluded with Resources for the Future, Inc. at the end of 1963 made it possible to strengthen the inadequate resources available to the Institute for the conduct of these activities and to set up a small Natural Resources Unit. Although this Unit has supported the advisory services and co-operated, in the training programme to a considerable extent, the energies of the specialists concerned have been mainly devoted to research, not only on methodological problems,<sup>3/</sup> but also in the form of field studies, as in the case of water resources in Chile. It can be seen from annex 8 that the results achieved are far from negligible, particularly as the studies carried out jointly with Resources for the Future were previously published in English.<sup>4/</sup>

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1/ See INST/L.22 (Spanish only).

2/ See Discusiones sobre planificación, Textos del ILPES (Siglo XXI Editores, México, 1966), p. 96.

3/ See Estevam Strauss, Metodología de evaluación de los recursos naturales, in the Institute's Cuadernos series.

4/ The books by Herfindahl--Natural Resource Information for Economic Development--and Wollman--The Water Resources of Chile--were published in New York by the Columbia University Press.

(b) Human Resources

In close and constant collaboration with the ILO, and subsequently—upon its establishment in Santiago—with the Regional Employment Programme for Latin America and the Caribbean area (PREALC), the Institute has done a good deal of work in this field, through the Human Resources Unit which the ILO's co-operation enabled it to set up. Without prejudice to the advisory activities entrusted to it, some of which, such as the mission in Minas Gerais, were of particular importance, the Unit has concentrated its attention mainly on training and research.

Apart from the teaching of this specialty in the Basic and intensive courses, two special courses on human resources planning were given in 1968 and 1970, one of them being followed by a seminar. As regards research, the Unit collaborated in the ILO Ottawa Plan, and methodological and bibliographical studies on under-employment and unemployment problems were prepared as stepping-stones to an over-all study of human resources in relation to Latin American development.<sup>1/</sup> Several documents which are the fruit of research on this sector will be found listed in annex 8.

(c) Regional and urban problems

In 1970 the Institute launched a systematic programme of research on regional and urban problems in Latin America, in close co-ordination with other international agencies and with specialized national institutions. This programme comprises an introductory study—already completed—followed by a seminar scheduled for early in 1972, both paving the way for five studies on regions in individual countries. The approximate duration of the whole programme will be three years, and its findings are expected to be of use in the provision of advisory assistance, over and above the fact that its implementation will encourage regional research and planning in the Latin American countries.

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<sup>1/</sup> See Esteban Lederman, Los recursos humanos en el desarrollo de América Latina, in the Institute's Cuadernos series.

/(d) Technological

(d) Technological Problems

With the aim of systematizing the expressions of concern for technological problems that have been voiced from time to time in various documents and in internal discussions, the Institute has recently begun to take steps towards drawing up a research programme in this field. It is studying the form that might be taken by macroeconomic research on the economic problems relating to cost, selection and adaptation of techniques in the construction industry, and their correlation with absorption of manpower. It has also already co-operated to some extent with other international agencies in this connexion.

(e) Planning Experiments

At the end of 1970 the Institute received a special donation from the Ford Foundation for the purpose of carrying out a one-year experimental project which may eventually constitute the basis for a programme of research fellowships. It was agreed with the Foundation that the primary objective of the donation in question might be to invite a former Latin American government official with top-level experience in planning to write about his own experience. The first of these invitations was issued to the economist Sergio Molina, ex-Minister for Finance and ex-Vice President of the Chilean Development Corporation (CORFO), with a view to his systematizing and analysing planning problems in the light of his experience as a government official, participating in the Institute's courses and collaborating in the provision of advisory services.

(f) Technical Meetings and Conferences

Among the technical meetings held under the sponsorship of the Institute or with its direct collaboration or the participation of its experts, the following call for special mention:

Seminar on the organization and administration of planning (Santiago, July 1965), in which Latin American government experts and technical specialists from ECIA took part in a personal capacity;<sup>1/</sup>

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<sup>1/</sup> The report of this seminar is reproduced in Discusiones sobre planificación, Textos del ILPES (Siglo XXI Editores, México, 1966).

Annual operational plans (Santiago, December 1966), with the participation of experts from the Governments of France and Argentina and from ECLA;

Second session of the United Nations Committee for Development Planning (Santiago, April 1967) with the participation of the distinguished members of the Committee and of representatives of the ILO, FAC, the World Health Organization (WHO), the International Monetary Fund (IMF), UNCTAD, the Economic Commission for Europe (ECE) and ECLA;

Criteria for evaluation of integration projects (Santiago, August 1967), with the participation of Latin American experts, INTAL, IDB, and MIT (United States);

International Symposium on Industrial Development convened by the United Nations Industrial Development Organization (UNIDO) at Athens (Greece) in November 1967;<sup>1/</sup>

Short-term monetary and financial programming (Santiago, November-December 1967), attended by Latin American government experts and representatives of ECLA, IDB, the Centre for Latin American Monetary Studies (CEMLA) and the Colegio de México;

Third Interregional Seminar on Development Planning (Santiago, March 1968), with the participation of representatives of the United Nations, top-level officials of planning offices in Latin America, Africa, Asia and Europe and representatives of specialized, international and inter-American agencies;

Progress of planning in Latin America (Santiago, March 1968), with the participation of an expert from the Commissariat Général du Plan de France and ECLA specialists;

Infrastructure and integrated development in Latin America (Santiago, April 1968), with experts from IDB and from Argentinian and Chilean institutions at the university level;

Economic integration and development (Santiago, July 1968), with experts from university centres in Argentina, Chile, Colombia, Mexico, Peru and Venezuela, as well as from CELADE.

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<sup>1/</sup> At this Symposium the Institute presented a document entitled "Notes on Industrial Development Strategy in Latin America", which was subsequently published in the Cuadernos series under the title of Consideraciones sobre el desarrollo industrial.

Sixth session of the Joint Commission of the Declaration of Bogotá, Meeting for discussion of the Andean Subregional Integration Agreement, held at Cartagena (Colombia) in July 1968;

Criteria for evaluation of integration projects (Santiago, September 1968), with the participation of representatives of the Massachusetts Institute of Technology (MIT) and CORFO, and of ECLA experts;

Second meeting on short-term monetary and financial programming (Santiago, January 1969), attended by experts from Argentina, France, Uruguay and ECLA:

Seminar held by the Colegio de México on integration-oriented national development (Mexico, August 1969);

Meeting of Chiefs of Planning Offices of countries signatories to the Andean Agreement (Lima, Peru), October 1969);

Seminar for Journalists on Development and Planning in Latin America, organized by ECLA and the Institute under the sponsorship of the United Nations Office of Public Information (OPI) (Santiago, December 1969);

Seminar organized by ODEPLAN to study the regional development of Chile (Concepción (Chile), January 1970);

Seminar on intellectuals and political power in Latin America, organized by the Center for Inter-American Relations (New York, February 1970);

United Nations Panel on Foreign Investment in Latin America (Medellín (Colombia), February 1970);

Seminar organized by the Colombian Institute for Family Welfare (Instituto Colombiano de Bienestar Familiar) and UNICEF (Bogotá (Colombia), February-March 1970);

Assembly of Governors of the Inter-American Development Bank (IDB) held at Punta del Este (Uruguay) in April 1970, at which the Director-General's report entitled Change and Development was presented;

Meeting organized by the Ford Foundation on the problems of education in Latin America (Buenos Aires, May 1970);

/Meeting of

Meeting of Chiefs of Planning Offices of the countries signatories to the Cartagena Agreement (i.e., the Andean Group), held at Lima (Peru) in May 1970;

Meetings of the Board of the Cartagena Agreement (Lima (Peru), July, August and October 1970 and others in the first half of 1971);

Latin American Regional Population Conference (Mexico City, August 1970);

Seminar on Industrial Statistics, convened by ECLA and the United Nations (Santiago, August 1970);

Seminar on development and employment policies, organized by the ILO and the Institute (Santiago, August 1970);

Meeting of the European Co-ordinations Centre for Research and Documentation on Social Sciences, under the International Social Science Council, with a view to setting up a system of exchange between the Institute and the Centre (Vienna (Austria), September 1970);

Inter-regional seminar on labour planning, organized by the ILO (Moscow (USSR), September-October 1970);

Fourth meeting on co-ordination in technical co-operation and pre-investment studies in Latin America, convened by IDB (Washington, September 1970);

Seminar convened by IDB to discuss the report entitled Change and Development (Santiago, October 1970), with the participation of eminent figures from Latin America, the United States and Europe;

Seminar on the sociology of development, organized by UNESCO and FLACSO (Santiago, November 1970);

Seminar on marginality in Latin America, organized by IDB and the Sociedad Chilena de Planificación y Desarrollo (PLANDES), with the collaboration of the Institute (Santiago, November 1970);

Seminar on the utilization of the economic space, organized by the National Planning Institute (Lima (Peru), March 1971).

In addition to the meetings listed, the Institute has taken part in conferences held by ECLA, IDB, the Inter-American Committee on the Alliance

/for Progress

for Progress (CIAP), FAO, UNESCO, the ILO, WHO and UNICEF; in technical meetings convened by the national research centres with which it co-operates; and in the general meetings of CLACSO, of which these centres are members. Nothing has been said here of the innumerable internal meetings and seminars held by the experts of its various Divisions, and with ECLA experts in relation to studies of common interest. (The results of some of these internal discussions have appeared in published form <sup>1/</sup>). Since 1969, monthly meetings of Directors of Divisions have been held to review the progress of work or to discuss a specific project or document.

#### 10. Collaboration with other Agencies and Institutions

Although it has been mentioned in several sections of the present report, the co-operation received by the Institute from several international and inter-American agencies and various national and private institutions merits brief recapitulation here.

Within the United Nations system, needless to say, it is with ECLA that the closest and most constant co-operation has been maintained. Under the aegis of ECLA the Institute was created, and with the ECLA secretariat it carries out joint programmes in a wide variety of fields.

The United Nations Development Programme, over and above its direct substantive support, has provided additional funds through the Office of Technical Co-operation for the financing of lecturers and fellowship-holders in the Basic and intensive courses, and has recently displayed interest in the Institute's collaboration in connexion with pre-investment.

The Institute has co-operated in various special courses with the ILO, which has largely financed its human resources activities, assigning ILO experts to the Institute. Since the establishment of PREALC in Santiago, the Institute has worked with it in several fields of common interest.

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<sup>1/</sup> See Dos polémicas sobre el desarrollo de América Latina, Textos del ILPES, (Editorial Universitaria, Santiago, Chile, 1970). The book contains papers by a number of ECLA and Institute economists, with a prologue by Cristóbal Lara Beautell, Deputy Director General of the Institute.

Several FAO experts have been detailed to the Institute to carry out research work, and the two institutions have co-operated with each other in advisory and training activities.

An agreement was concluded with UNESCO which made it possible to hold a special course on educational planning over a period of several years, but which was terminated in 1968 because UNESCO decided to undertake this activity on its own account. At the end of 1970 and the beginning of 1971 conversations were held with the Organization in question, and there are good ground for hoping that these may shortly lead to further collaboration in the educational field, now with two additional features: a joint mission to study the educational situation in Latin America, and the assignment to the Institute's Social Planning Programme of three experts who will be engaged not merely in teaching activities but essentially in research on educational planning.

Through the Pan American Health Bureau, constant co-operation has been maintained with WHO in respect of the annual special course on health planning. The joint programme has produced excellent results, as can be seen in section II.1 of the present report.

The generous and continuing financial contribution made by UNICEF has enabled the Institute not only to carry forward the programmes and seminars of common interest mentioned in section II.4, but also to strengthen the inadequate resources of the Social Programming Division.

The International Monetary Fund and the Institute have kept up a fruitful exchange of lecturers.

The Institute's collaboration with CELADE deserves special mention. The Research Division of the Institute has benefited by the collaboration of members of the CELADE staff, and the two agencies have worked together uninterruptedly on a wide variety of projects in which demographic questions constituted an essential element in the analysis of more general development problems.

/Within the



Within the inter-American system, IDB has given the Institute unfailing support, not only from the financial standpoint, but in specific studies of common importance for the two institutions, in particular in the field of projects and pre-investment. It is needless to recall that the collaboration of the Director-General of the Institute was exemplified in the report on change and development in Latin America. In conjunction with INTAL, an IDB agency specializing in Latin American integration, several research projects have been carried out, and the Institute detailed one of its officials to INTAL to collaborate in the analysis of the problems relating to the River Plate basin.

The Organization of American States (OAS) has kept in touch with the Institute through programmes of common interest, and has made contributions to its courses in the shape of fellowships. It has also offered its support for one of the planning seminars that are being organized. The Director-General of the Institute has assumed the responsibility of representing ECLA at the annual meetings of CIAP to discuss national development plans, and has collaborated in various evaluation activities in which his cooperation has been requested.

The United States Agency for International Development (AID) has made contributions on different occasions to the fellowships for Institute courses.

At the level of Latin American institutions, the Institute's collaboration with the national research centres members of CLACSO has already been mentioned in section II.3 of the report. Meaningful institutional relations are maintained with this Council, and--apart from the fact that the Director-General is a member of its Executive Committee-- a permanent representative of the Institute attends its meetings. Among the centres belonging to the Council, those with which the Institute has carried out joint studies or has participated directly in the discussion of other research include the Torcuato di Tella Institute (Argentina); the Centre for Statistical and Mathematical Studies of the Universidad de Chile; the Colegio de México; the Universidad de Ingeniería del Perú; and CENDES (Venezuela).

/Attention must

Attention must be drawn to the support given by many Latin American Governments which have requested the services of the Institute, in some cases on a basis of reimbursement, and there is no need to stress the unflagging support of the Government of Chile, which has provided so many operational facilities, and with which the Institute has co-operated in a wide variety of fields, either directly or through State enterprises such as CORFO. At the same time, highly valuable relations have been maintained with many universities and cultural organizations specialising in planning. Apart from those referred to in the preceding paragraph, special mention may be made of the Universities of Concepción and Valdivia in Chile, as well as the Universidad Católica and PLANDES; the Universidad del Sur and the National Development Council (CONADE) in Argentina; the Universidad de la República in Uruguay; the Universidad Nacional Autónoma in Mexico; the Universidade de Campinas in Brazil, etc.

But for the agreement concluded with the United States agency Resources for the Future, Inc., it would have been impossible for the Institute--which lacked sufficient means of its own for the purpose--to furnish the contribution it has made in the field of natural resources, which has taken the specific form of several joint publications in English and Spanish.

The Ford Foundation wished to carry out a joint Institute/DESAL project on marginality; but causes beyond the control of the parties made this impracticable at the time. Recently, however, the Institute has concluded agreements relating to research on planning experience <sup>1/</sup> and arrangements are being made for work in the field of development theory from the sociological standpoint.

Working relations have been established with the Latin American Institute for Social Research (ILDIS), which hold out promising prospects for the studies on urban and regional development undertaken by the Institute.

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<sup>1/</sup> See section II.9 (e) above.

To continue enumerating the Institute's relations and links with other institutions and agencies in Latin America, the United States and Europe would make this brief review of external contacts unending. It cannot be concluded, however, without mention of the co-operation received from the Governments of France, the Federal Republic of Germany and--most particularly--the Netherlands. The support of this last-named Government has been not only significant but virtually uninterrupted.

## 11. Publications

The series known as "Textos del Instituto Latinoamericano de Planificación Económica y Social" ("Textos del ILPES")--in which nine works had been issued by the end of Phase II (see annex 8)--was launched at the beginning of 1966, under agreements negotiated with two important publishing houses, one in Mexico City and the other in Santiago (Chile).

The Institute's Publications Programme was established in January 1967. In addition to the publication of further Textos, at the end of that same year the Institute brought out in Santiago the first of its Cuadernos, which consist of three series: I. Class notes (Apuntes de clase); II. Preliminary research findings (Anticipos de investigación); and III. Practical handbooks (Manuales operativos). By mid-1971 twenty Cuadernos had been issued (see again annex 8).

A start has been made on preparatory work for the publication of an Institute periodical, which will appear early in 1972. Estimated requirements for the third phase of the project include additional staffing resources for this purpose, which will also enable the publications programme to be stepped up in the next few years.

Demand for the Institute's publications has been brisk. Most of the Textos have already run into second editions, and so have many of the Cuadernos. Direct sales of its publications by the Institute have steadily increased year by year, and modest as are the distribution media at its disposal, the results achieved have been very encouraging, especially if the low prices of the Cuadernos are taken into account (see annex 9).

A Publications Committee appointed by the Director-General is responsible for the technical analysis of texts to be issued under the Programme and for submitting recommendations as to their publication.

## 12. Administrative Aspects

### 1. Professional Staff

The Institute absorbed a total of 1,855 man/months during the period of the first phase and 3,012 man/months during the second phase.

### 2. Non-professional staff

The local staff employed accounted for 2,400 man/months in the first phase and 2,832 in the second. It comprised research assistants, statisticians and administrative assistants, secretaries, chauffeurs, messengers and other auxiliary personnel.

### 3. Fellowships

The fellowship-holders were financed by the UNDP, the expanded and regular United Nations programmes of technical assistance, other international agencies, and Governments.

### 4. Equipment

With a view to equipping its offices, the Institute purchased inventoriable equipment, periodically renewable, to an approximate value of 80,400 dollars (see appendix III).

### 5. Premises

During the first phase, the headquarters of the Institute was located in several buildings of which the rent was paid by the Government of Chile. At the beginning of the second phase it came to share with ECLA the offices of the new United Nations Building, in accordance with the agreement concluded. As a result of this new situation, an agreement on common services was concerted between ECLA and the Institute. During the first few years the financing of these services were distributed in proportion to the area occupied by each institution. Later, an aggregate sum was

/fixed on

fixed on the basis of past experience and on the understanding that it would be periodically reassessed.

6. Other Services

Owing to the fact that the same building is shared by the Institute and ECLA, several sections, including, for example, those provided by the Library and the translation section, are common to both establishments and are covered by the above-mentioned agreement.

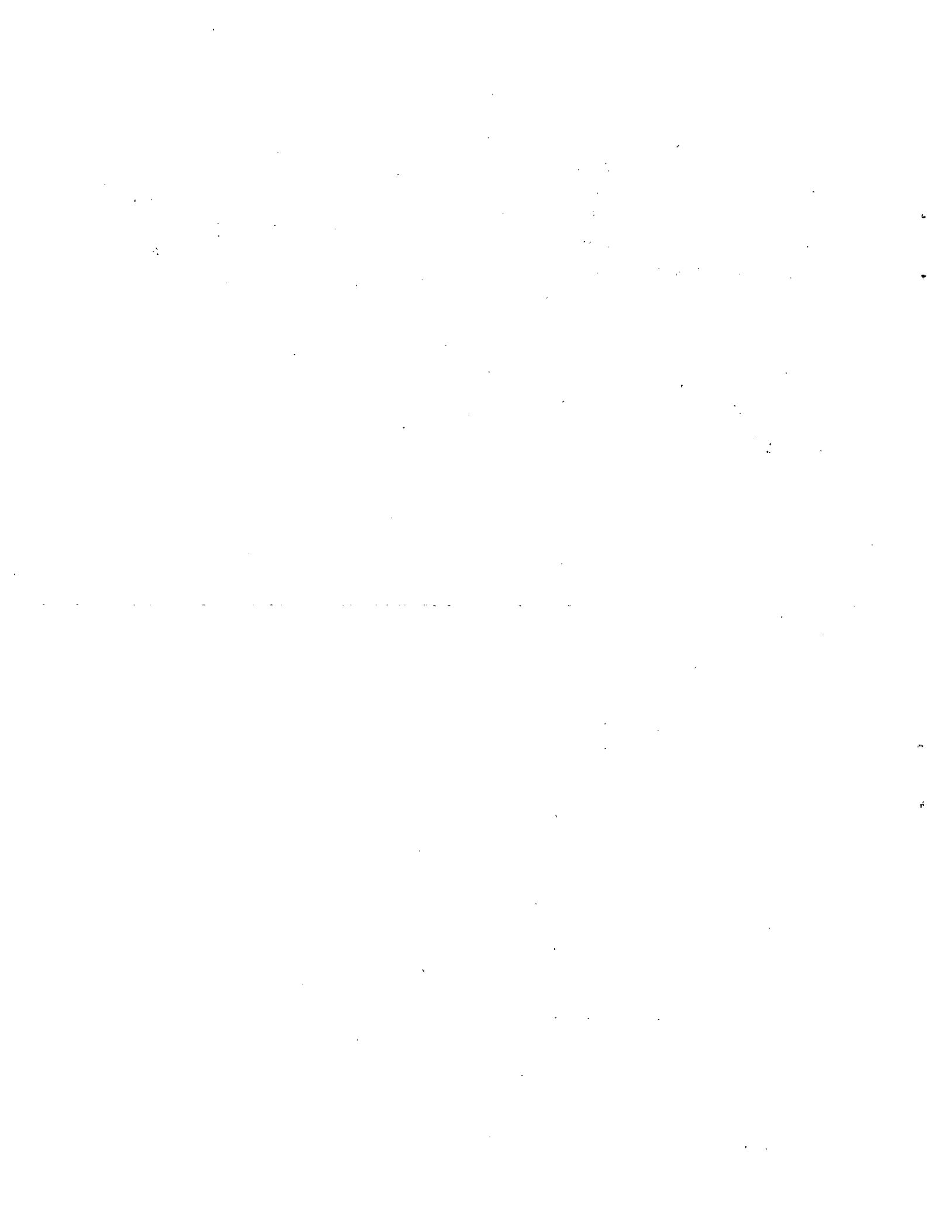
### III. EVALUATION OF RESULTS, AND CONCLUSIONS AND RECOMMENDATIONS

A brief account having been given in section II of the Institute's main activities during the first and second phases of its existence as a UNDP project supported by IDB and the Latin American Governments, it would seem appropriate in a report of this kind to evaluate the results of the activities in question and present the corresponding conclusions and recommendations. It was deemed unnecessary, however, to draft this section of the report, on formal lines, since apart from the fact that the foregoing review of the Institute's work provides a good deal of material on which an appraisal of its results can be based the conclusions and recommendations can be advantageously replaced by perusal of the appended document "Proposals submitted by the Director-General to the Governing Council respecting the future activities and financing of the Institute" (INST/L.18) (see annex 3).

In the proposals formulated in this document the Director-General expresses with precision all that might be said here. It is also worth while to recall that at the time of writing the present report for submission to UNDP—involuntarily somewhat behind schedule, for reasons partly beyond the Institute's control—, not only have the proposals been endorsed by the Governing Council at its thirteenth session (January 1970) and by the States members of ECLA at the session of the Committee of the Whole held in New York in May 1970, but UNDP itself has accepted the recommendations in favour of the continuance and financing of the Institute submitted to it in due course by the joint UNDP/IDB mission appointed to study the problem. The mission's recommendations were based on the conclusions it drew from its own evaluation, but in addition the proposals of the Director-General were constantly taken into consideration and endorsed in its report.

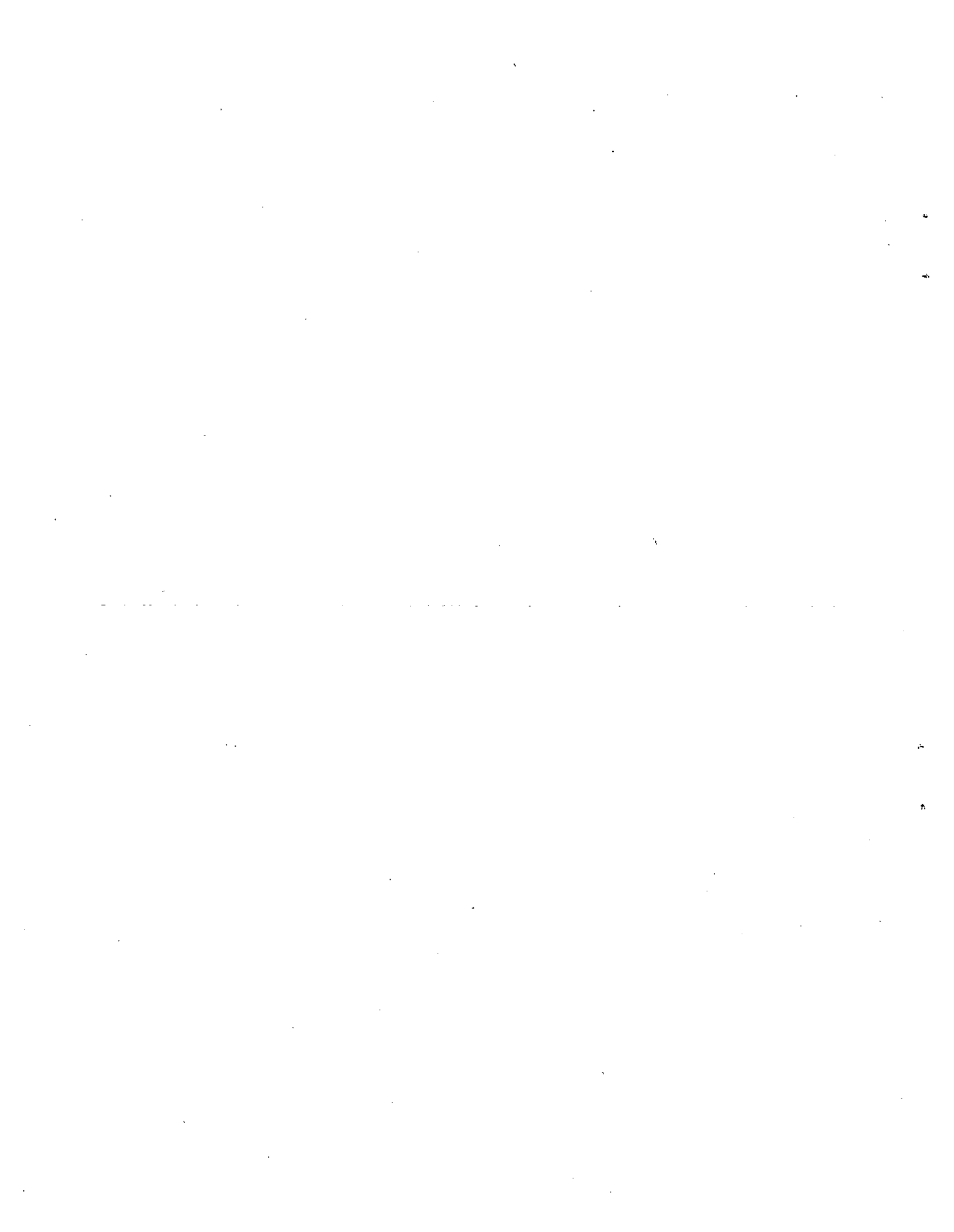
/It seems,

It seems, therefore, pointless to repeat here the evaluation of the Institute's work which has been made in the above-mentioned document, and to put forward recommendations which have already been formulated by the Director-General in his "Proposals". Not only have these been accepted, but they have been taken up in a Plan of Operation which is open for signature by the Governments, and in which the points of view of UNDP and the Institute have been harmonized so as to enable the Institute to proceed with its programme of work and its activities in Latin America vis-à-vis the economic and social development problems of the region.



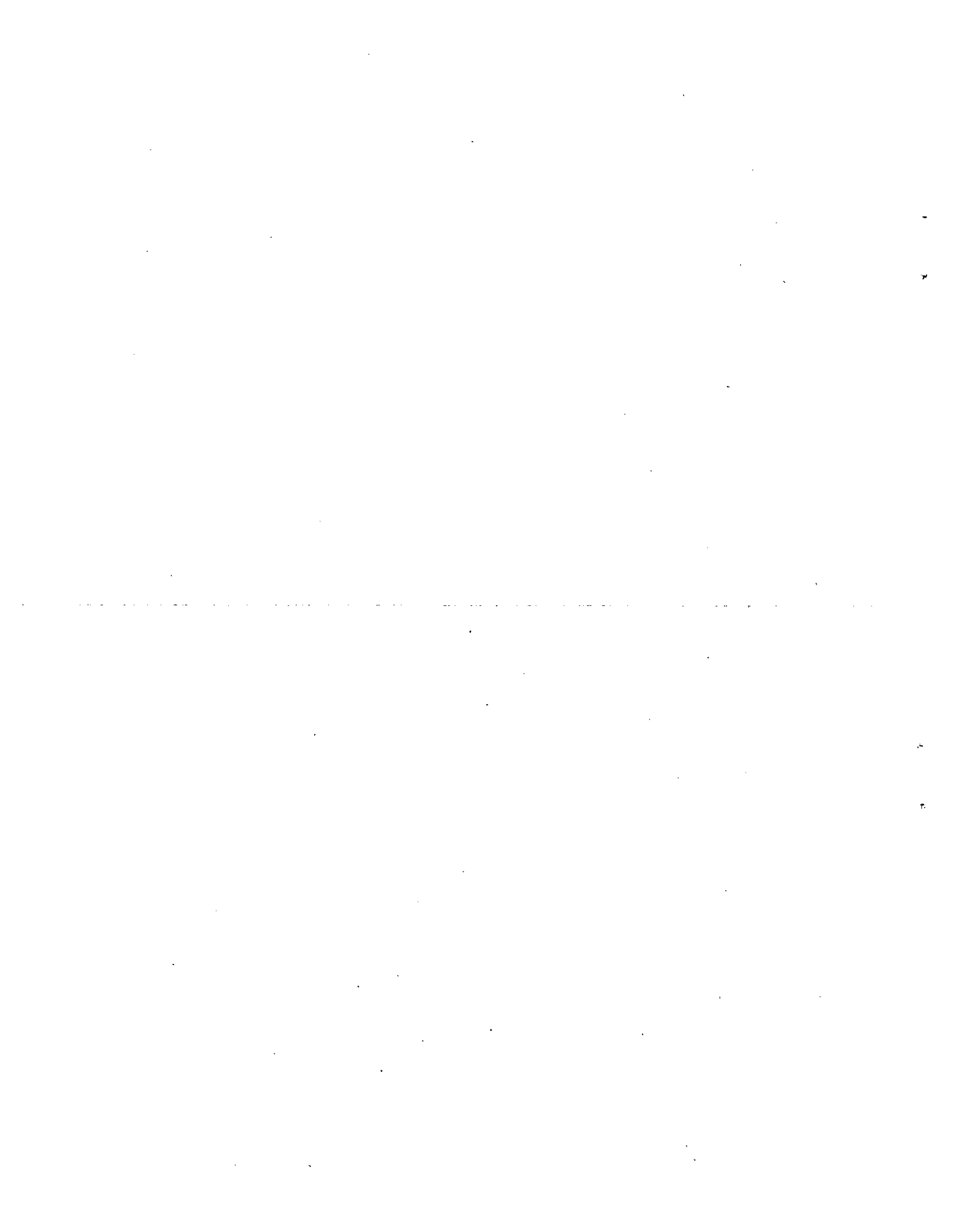


**ANNEXES**



ANNEX I

RESOLUTION 220 (AC.52)



RESOLUTION 220 (AC.52): LATIN AMERICAN INSTITUTE FOR ECONOMIC AND SOCIAL  
PLANNING\*

The Committee of the Whole of the Economic Commission for Latin America.

Noting with satisfaction the document prepared by the Executive Secretary on the Latin American Institute for Economic and Social Planning (E/CN.12/AC.50/7) and submitted in compliance with the provisions of paragraph 1 of Economic Commission for Latin America (ECLA) resolution 199 (IX),

Bearing in mind General Assembly resolution 1708 (XVI), which invites the Governments concerned to establish development planning institutes closely linked to the respective regional economic commissions,

Expressing its appreciation to the United Nations Special Fund and to the Inter-American Development Bank, whose contribution has made possible the establishment of an institute for development planning in Latin America,

Expressing gratification at the prospect that the United Nations, in discharging its responsibilities as Executing Agency, will act through ECLA,

Noting with satisfaction the Special Fund's agreement that the Institute, as an autonomous body under the aegis of ECLA, be located at Santiago, and the generous offer by the Government of Chile to provide appropriate premises,

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\* Note: This resolution is based on resolution 218 (AC.50), with the amendments approved at the ninth session of the Committee of the Whole.

/Expressing the

Expressing the hope that the Regular and Expanded Programmes of Technical Assistance will give additional help by granting United Nations resources and fellowships for training at the Institute, and

Considering the urgent need to expedite economic and social development in the Latin American countries,

Resolves:

1. To establish the Latin American Institute for Economic and Social Planning, which will be responsible for providing, at the request of the Governments concerned, training and advisory services to the countries and areas within the geographical scope of the Commission, and for undertaking research on planning techniques, in accordance with the following aims and functions:

- (a) To raise the technical level of government officials and specialists through training programmes in the form of courses and in-service training;
- (b) To assist Governments in establishing the institutional and technical organization required for the more efficient programming of their economic and social development policies;
- (c) To assist Governments, at a purely technical level, in preparing their economic and social development programmes;
- (d) To carry out the theoretical studies required for the improvement of planning techniques used in Latin America.

2. To establish for the Institute a Governing Council, having the following functions:

- (a) To lay down general rules governing the action of the Institute in matters entrusted to it;
- (b) To review and approve work programmes and the relevant budgets;
- (c) To submit to ECLA, each year, a progress report on the work of the Institute.

/3. To

3. To provide that the Governing Council shall be composed in the manner and subject to the stipulations stated below:

- (a) Eleven members of recognized technical ability: eight of these members shall be nationals of eight different Latin American countries and shall be elected by ECLA, one member shall be appointed by the President of the Inter-American Development Bank, one member shall be appointed by the Secretary General of the Organization of American States and one member shall represent the Secretariat of ECLA, as international organizations working in the economic and financial field in Latin America;
- (b) In electing the eight members mentioned above, care shall be taken to ensure equitable geographical distribution;
- (c) Members of the Governing Council shall be elected or appointed at regular ECLA sessions, as provided for in sub-paragraph (a) above, for a term of two years, and may be re-elected or re-appointed for successive terms;
- (d) The Director-General of the Institute, mentioned in paragraph 4 below, shall be an ex-officio member of the Governing Council, with the right to participate, without vote, in its deliberations;
- (e) The Governing Council shall elect a chairman from among the eight members mentioned in sub-paragraph (b) above and shall adopt rules of procedure for its meetings, which shall be held at least twice a year.

4. To create the post of Director-General, the incumbent to be appointed by the Secretary-General of the United Nations after prior consultation with the Governing Council and to be entrusted with the direction and administration of the Institute, in accordance with the instructions issued by the Governing Council and with the following stipulations and functions:

/(a) To

- (a) To submit the programmes and budget of the Institute to the Governing Council;
- (b) To execute the programmes and to undertake the expenditure envisaged in the budget;
- (c) To select and appoint the staff of the Institute;
- (d) To select the fellows for the Training Programme;
- (e) To conclude with Governments and with other national or international agencies such contracts or other arrangements as may be necessary for making available the services of the Institute, it being understood that the arrangements with national bodies shall be with the approval of the Governments concerned;
- (f) To accept on behalf of the Institute contributions from Governments, international organizations and private foundations and institutions for the purposes of financing its activities;
- (g) To co-ordinate the work of the Institute with that of other international, regional and bilateral programmes in related fields;
- (h) To attend the meetings of the Governing Council;
- (i) To report to the Governing Council on the activities of the Institute and on the execution of its work programme.

In the exercise of his powers and the discharge of his responsibilities, the Director-General may reach agreement with the specialized agencies as to methods of co-operating with the Institute in the respective fields of such agencies.

5. To establish an Advisory Committee, to be composed of a representative of the ECLA Secretariat, a representative appointed by the Inter-American Development Bank, a representative appointed by the Organization of American States, and representatives of other organizations substantially contributing to the activities of the Institute and invited by the Governing Council to be represented on the Advisory Committee.

/The functions



The functions of this Committee shall be to advise the Director-General on matters relating to the work of the Institute such as the Training Course curriculum and fellowships, the work of the advisory groups, and, in particular, the co-ordination of the activities of the Institute with those of other international organizations assisting Latin America in economic planning and social development and in the training of specialists in these areas. The Advisory Committee shall be permanent in character, and shall meet at least once a month at the headquarters of the Institute.

The Committee of the Whole of the Economic Commission for Latin America,

Further resolves:

1. That the first election of the members of the Governing Council referred to in paragraph 3 (a) of part A of this resolution shall take place at an extraordinary meeting of the Committee of the Whole, to be held at Santiago on 21 March 1962 with this exclusive end in view. The members thus appointed shall remain in office until the tenth session of the Commission. With a view to facilitating the convening of this extraordinary meeting, it is agreed that the Secretariat shall not be required to abide by the provisions laid down in the rules of procedures of the Commission in respect of documentation, prior notice and other arrangements.
2. That the Governing Council of the Institute shall approve a Plan of Operation for the United Nations Special Fund project in accordance with the provisions of the present resolution and, should the occasion arise, shall authorize the Chairman of the Governing Council to sign it.
3. That the Governing Council shall submit to ECLA, prior to its 1966 session, a proposal designed to ensure the continuity of the Institute, in accordance with the aims referred to in paragraph 7 of ECLA resolution 199 (IX).

/4. That

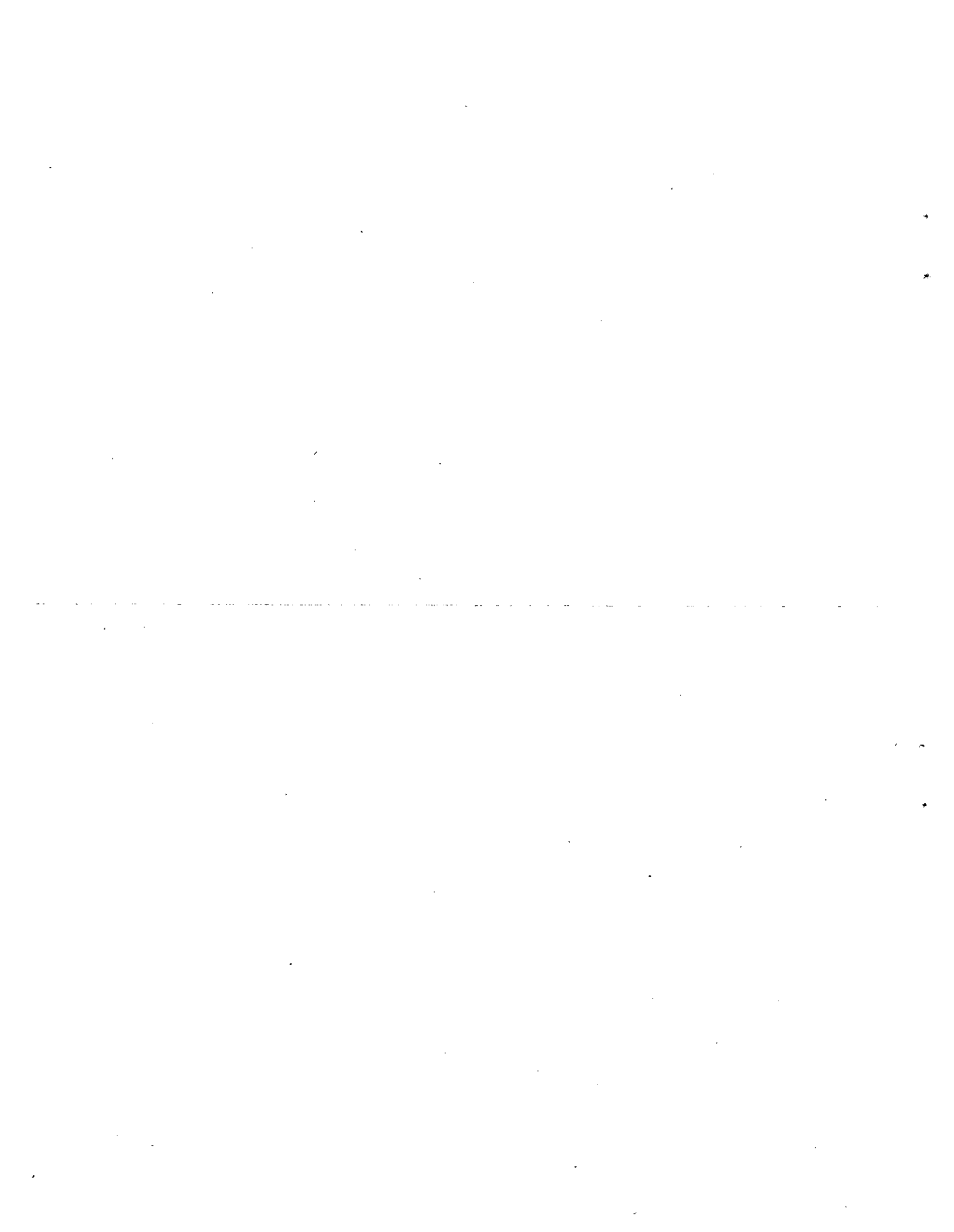
4. That the Director-General of the Institute, after prior consultation with the Governing Council, shall reach agreement with the Executing Agency and the United Nations Special Fund on any change in the budget contained in the Plan of Operation of the Special Fund project.
5. That, as long as the Special Fund contribution continues, the Director-General of the Institute, in addition to reporting to its Governing Council, shall report directly to the Executing Agency in accordance with the provisions of the Special Fund project.
6. That the Director-General may also request the co-operation of the Resident Representatives of the Technical Assistance Board, who are also programme directors of the Special Fund, in regard to the provision of such training and advisory services as may be agreed upon with the Governments concerned.
7. That, for the purpose of furthering the aims of the Institute, the Director-General may, in consultation with the Tripartite OAS/ECLA/IDB Committee, consider what co-operation might be afforded by these organizations with respect to any requests that Governments may make for training and advisory services.
8. To urge the Latin American Governments to submit to the United Nations Special Fund separate requests for advisory services, as provided in paragraph 5 of document E/CN.12/AC.50/7.

6 June 1962

/ANNEX 2

ANNEX 2

MEMBERSHIP OF THE GOVERNING COUNCILS OF THE INSTITUTE FROM 1962 TO 1971



MEMBERSHIP OF THE GOVERNING COUNCILS OF THE INSTITUTE FROM 1962 TO 1971\*

1962\*\*

Luis Escobar Cerda (Chile)  
Celso Furtado (Brazil)  
Felipe Antonio Galarza (Bolivia)  
Plácido García Reynoso (Mexico)  
Héctor Hurtado (Venezuela)  
Bernal Jiménez Monge (Costa Rica)  
Germánico Salgado (Ecuador)  
Alejandro Solari (Argentina)

1963\*\*\*

Luis Escobar Cerda (Chile)  
Alberto Fuentes Mohr (Guatemala)  
Celso Furtado (Brazil)  
Plácido García Reynoso (Mexico)  
Héctor Hurtado (Venezuela)  
Bernal Jiménez Monge (Costa Rica)  
Manuel San Miguel (Argentina)  
Angel Valdivia (Peru)

1965\*\*\*\*

Roberto Campos (Brasil)  
Roque Carranza (Argentina)  
Alberto Fuentes Mohr (Guatemala)  
Plácido García Reynoso (Mexico)  
Gustavo Guerrero (Nicaragua)  
Enrique Iglesias (Uruguay)  
Sergio Molina (Chile)  
Alfonso Patiño (Colombia)

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\* The only names given are those of the members of the Council elected by the States member of ECLA under the terms of resolution 220 (AC.52). The other three members of the Council are the President of IDB, the Executive Secretary of ECLA and the Secretary-General of OAS, or such representatives as they may appoint.

\*\* Elected at the fourth extraordinary session of the Committee of the Whole of ECLA (Santiago, Chile, March 1962).

\*\*\* Elected at the tenth session of ECLA (Mar del Plata, Argentina, May 1963).

\*\*\*\* Elected at the eleventh session of ECLA (Mexico City, May 1965).

1967\*

Helio Beltrao (Brazil)  
Alberto Fuentes Mohr (Guatemala)  
Plácido García Reynoso (Mexico)  
Gustavo Guerrero (Nicaragua)  
Enrique Iglesias (Uruguay)  
José Antonio Mayobre (Venezuela)  
Sergio Molina (Chile)  
Manuel San Miguel (Argentina)

1969\*\*

Helio Beltrao (Brazil)  
Carlos Manuel Castillo (Costa Rica)  
Plácido García Reynoso (Mexico)  
Enrique Iglesias (Uruguay)  
Sergio Molina (Chile)  
Luis Enrique Oberto (Venezuela)  
Alfonso Rochac (El Salvador)  
Manuel San Miguel (Argentina)

1971\*\*\*

Roberto Arenas Bonilla (Colombia)  
Gladstone Bonnick (Jamaica)  
Carlos Manuel Castillo (Costa Rica)  
Enrique Iglesias (Uruguay)  
Gonzalo Martner (Chile)  
Luis Enrique Oberto (Venezuela)  
Gert Rosenthal (Guatemala)  
Leopoldo Solís Manjárez (Mexico)  
Juan V. Sourrouille (Argentina)  
Joao Paulo Reis Veloso (Brazil)

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\* Elected at the twelfth session of ECLA (Caracas, Venezuela, May 1967).

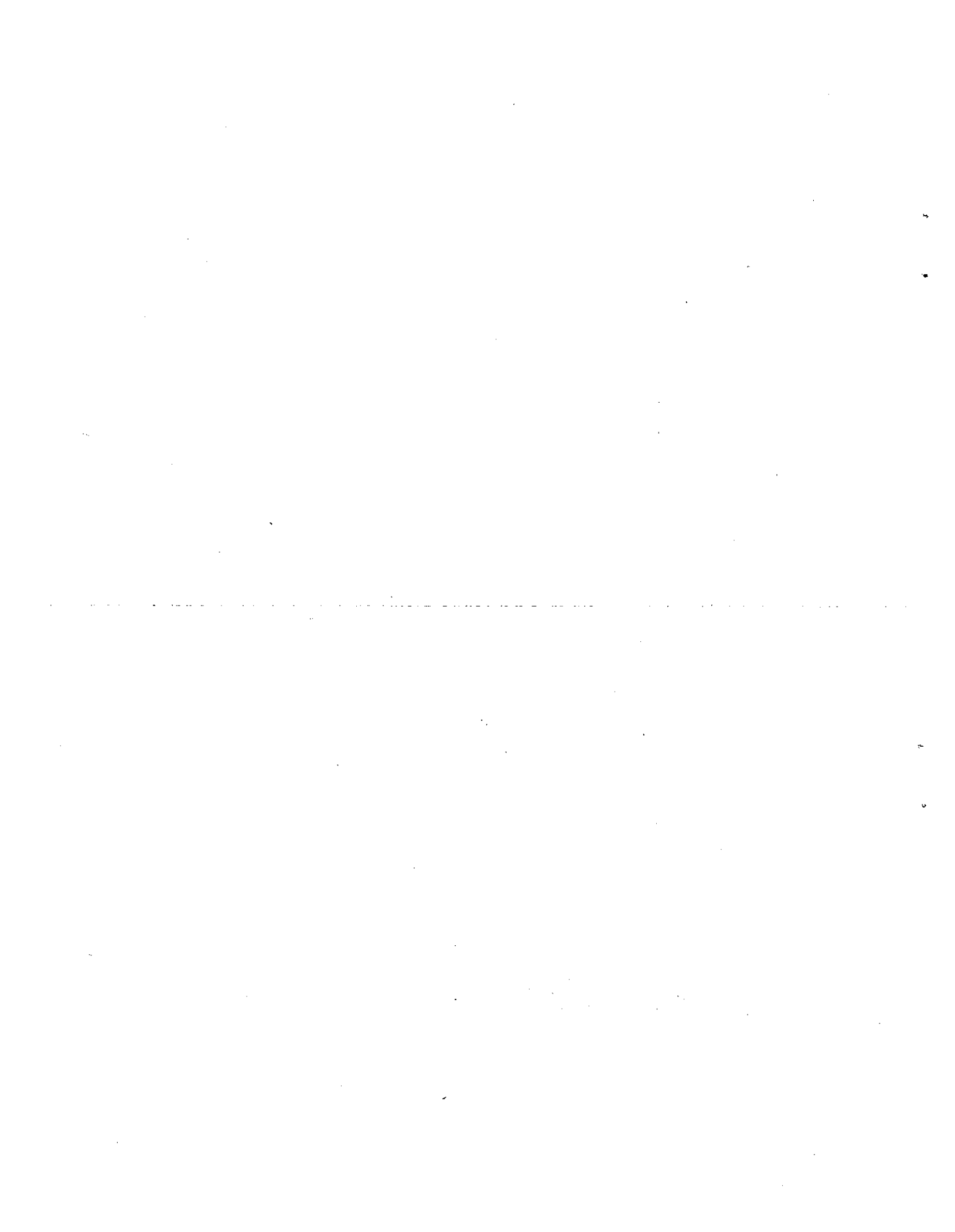
\*\* Elected at the thirteenth session of ECLA (Lima, Peru, Apr 1 1969).

\*\*\* Elected at the fourteenth session of ECLA (Santiago, Chile, April-May 1971), at which the number of members of the Governing Council who are national of Latin American countries and are elected by the Commission was increased to 10 (see resolution 299 (XIV)).

ANNEX 3

PROPOSALS SUBMITTED BY THE DIRECTOR-GENERAL TO THE GOVERNING  
COUNCIL RESPECTING THE FUTURE ACTIVITIES AND  
FINANCING OF THE INSTITUTE \*

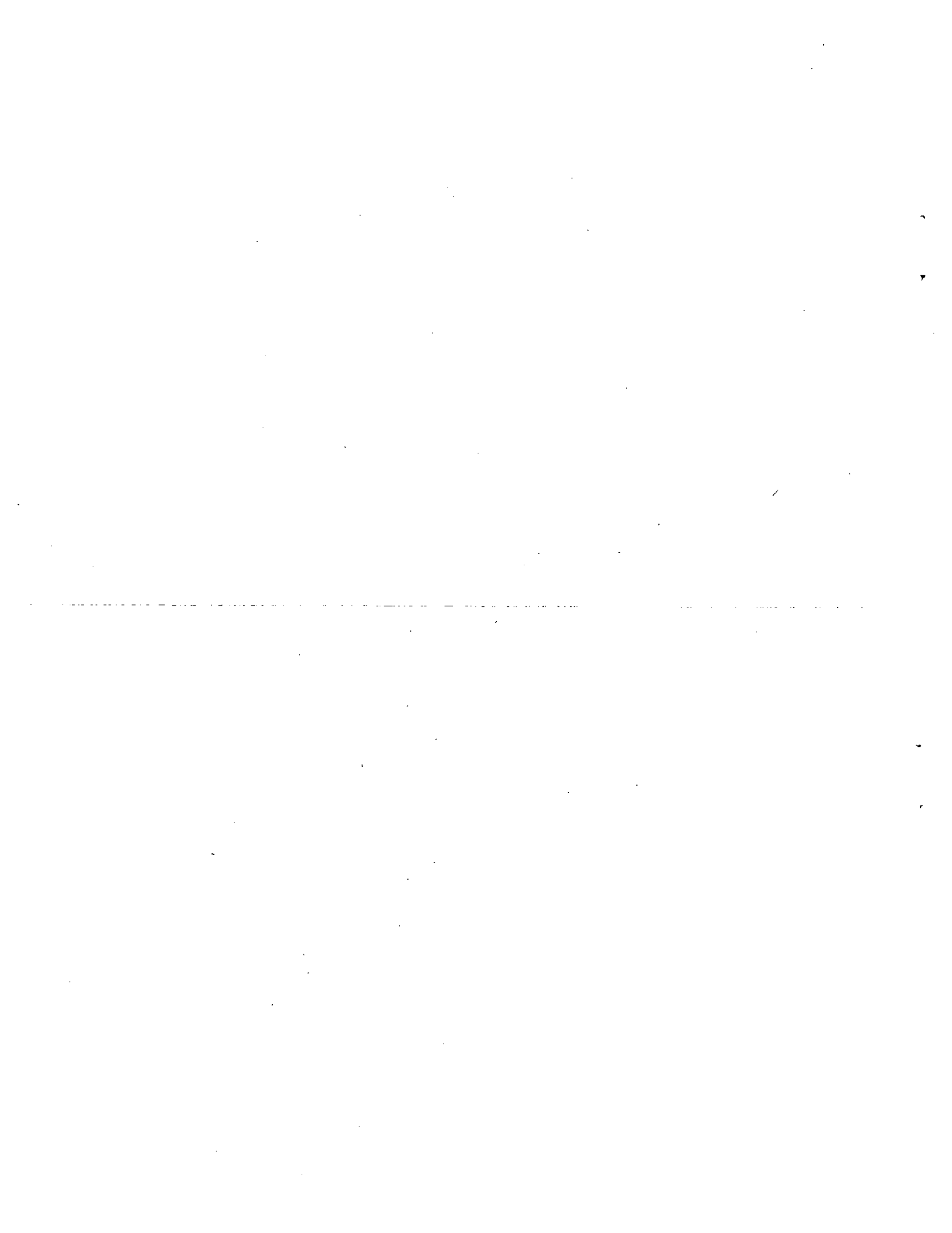
\* Document INST/L.18 presented to the thirteenth session of the  
Governing Council (Santiago, Chile, 8-9 January 1970)





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## INTRODUCTION

The time has now come for the Institute to begin preparing for the third phase of its activities. To that end, the course they have followed thus far must be reviewed and thought must be given to the lines on which they should be conducted in the future. It is also essential to consider the best ways of placing the financing of the Institute on a permanent footing. A clear idea must therefore be formed of the directions its action is to take in the next few years and of the role it will be called upon to play in Latin America.

Accordingly, it was decided to hold a special meeting of the Governing Council for the purpose of exchanging views, on an entirely informal basis, with regard to the Institute's current problems, its future, and the basic guidelines for its programme of work.

This meeting <sup>1/</sup> was exceptionally useful. It provided an opportunity not only for frank and open discussion of Latin American problems, but also for clarifying many ideas with respect to the Institute's activities and for assembling some highly constructive suggestions and views as to its programme of work and ways of giving it the financial stability it must have in the future.

Because of its informal character this meeting was not called upon to adopt resolutions or formulate recommendations. The members of the Council suggested, however, that the Director-General, in co-operation with the President of the Governing Council and the Executive Secretary of ECLA, should take up and analyse the ideas put forward, with a view to presenting, at the next regular meeting of the Council (Santiago, Chile, 8 and 9 January 1969),

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1/ It was held in the ECLA Office at Mexico City on 12 and 13 September 1969, and was attended by the following persons:

a) Members of the Governing Council

Enrique Iglesias (Chairman)

Carlos Manuel Castillo, Secretary-General of the Permanent Secretariat of the General Treaty on Central American Economic Integration (SIECA)

Plácido García Reynoso, Under-Secretary for Industry and Trade, Mexico

(cont.)

/proposals concerning

proposals concerning the Institute's future activities and the solution of its financing problems.

The following pages are designed to serve this latter purpose. Suggestions are advanced with regard to the Institute's principal activities and new guidelines for its work, always bearing in mind the role incumbent upon it as a United Nations agency vis-à-vis Latin America's economic and social development problems. It is hoped that this review will provide the bases for realistic consideration of the best ways of settling the question of the future financing of the Institute.

### 1. Training

At the beginning of the nineteen-fifties, ECLA, taking advantage of its stock of experience and its knowledge of Latin America's problems, initiated training courses on economic development under the direction of Jorge Ahumada. The Institute assumed responsibility for these courses early in the present decade, and has expanded them in both number and scope. The training activities carried on in Santiago, comprising the Basic Courses and the various special courses, together with the intensive courses that have been held in the great majority of the Latin American countries, may be described as the most serious effort hitherto made in the region to impart knowledge in the sphere of development planning and to encourage and promote studies on the subject.

In round figures, more than 5,000 professionals have already attended the various Institute courses. The Basic Course, the special courses on educational, health, housing and human resources planning and on annual operational plans, the special course held for trade union leaders, and the intensive courses given in different countries, which have dealt with

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1/ (cont.)

Sergio Molina, Vice-President, Development Corporation (CORFO), Chile

Luis Enrique Oberto, Director, Planning Office, Venezuela

Cecilio Morales, Representative of the Inter-American Development Bank (IDB)

Carlos Quintana, Representative of ECLA

Walter Sedwitz, Representative of the Organization of American States (OAS)

(cont.)

/general planning

general planning and development problems and techniques and with specific aspects of industrial and agricultural planning over-all programming, trade policy and economic integration, project analysis, performance budgeting, etc., have all contributed, in varying degrees, to the technical training of the thousands of Latin American professionals concerned. Scattered throughout the region, many of them hold key posts with their governments or in public administration, universities and the private sector, and their influence has had a multiplier effect on the Institute's work, making it of noteworthy importance for the whole of Latin America. Evidence of this is also to be found in the Latin American universities, many of which have introduced curricula and texts inspired or prepared by the Institute. The same is true of various training activities in the Latin American countries which were initiated with the Institute's collaboration and now continue under the direct responsibility of national institutions.

The contribution which the Institute has made in this field fulfills one of the central purposes for which it was established. Its activities have met a crying need. Today, the situation with regard to technical training in the specialties concerned has changed completely in most of the Latin American countries. There are still serious deficiencies, but it is satisfactory to note that many countries are making a sustained and well-directed effort to fill the gaps. The Institute courses may therefore be considered to have largely attained their objective in respect of this first essential stage of basic training in planning and development. Without shelving that function altogether, the Institute should indubitably now embark upon a new phase of training activities. The decision to make a pause in its teaching work in 1970 will afford it an opportunity of

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1/ (cont.)

b) Institute staff members

Raúl Prebisch, Director-General

Cristóbal Jara, Deputy Director-General

Francisco Giner de los Ríos, Secretary of the Institute

(cont.)

/taking the

taking the first steps in that direction. In mapping out its new course of action it will have to make the fullest possible use of the experience acquired both inside and outside the region, and a prerequisite for this is to systematize the existing knowledge of Latin America's situation and problems, as well as to probe them more deeply.

This cannot be a self-contained undertaking however. The Institute must also have ample contact with other circles, so that the analysis of problems and experiences can be enriched and made more realistic by taking account of other perspectives and different points of view. It would seem that a good way to put this idea into practice will be to organize a programmed series of seminars at which such problems and experiences can be considered in objective and open discussion. The aim will be to secure the participation of economists, sociologists and other specialists from inside and outside Latin America, and of government officials concerned with economic policy and planning activities in the various countries, so as to include among the topics of discussion not only the march of ideas at the academic and theoretical level, but also the views based on practical action to deal with Latin America's main development problems.

These activities will begin in 1970 with a number of seminars which will include, for example, a meeting of directors of planning offices and heads of development institutions to review current planning problems in their

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1/ (concl.)

c) Other participants

Ildegar Pérez Segnini, Executive Director, IDR  
Manuel Balboa, Deputy Executive Secretary, ECLA  
Joseph Moscarella, Director, ECLA Office, Mexico  
Porfirio Morera Batres, Deputy Director, ECLA Office, Mexico  
René Montserrat, Deputy Director, Department of Economic Affairs, OAS  
Aldo Solari, Social Affairs Division, ECLA  
Israel Wonssewer, Professor, Faculty of Economic Sciences, Uruguay

The following members of the Governing Council regretted that they were unable to attend: Mr. Helio Beltrao, Minister for Planning, Brazil; Mr. Alfonso Rochac, Minister of Economic Affairs, El Salvador; and Mr. Manuel San Miguel, Under-Secretary for Economic Affairs, Argentina.

/broadest context

broadest context, and more specifically those which relate to plan implementation. It is hoped that this seminar will initiate a system of periodic meetings which will make it possible to institutionalize, in some degree, close linkage between the various national planning offices, and between them and the Institute.

The reorientation of the Basic Course has been under consideration within the Institute for some time.<sup>1/</sup> It should be recalled that when this course was first started, little was known about the problems of under-development. Today, in contrast, the stock of knowledge is much greater—although still inadequate—and other training centres and institutions are operating in Latin America side by side with the Institute. It is felt, therefore, that the time has come to raise the level of the Basic Course, and to focus its attention on the study of the main development problems in the Latin American countries and the best policies for dealing with them. A major part of the activities of such a Basic Course would consist in individual research on subjects chosen by the participants, and internal discussion with economists and sociologists in ECLA, IIPES and other Latin American institutions. Rather than transposing and transmitting ready-made know-how and techniques which have already been sufficiently widely disseminated, the aim would now be to discuss ideas and to adopt an imaginative and far-reaching approach to the continued study of Latin American development problems and of practical ways of influencing the existing state of affairs.

For this purpose, it may be desirable to limit the number of participants to lengthen the training period where appropriate, and to share with the trainees the research work on economic and social development carried out by the Institute, and the dialogue on Latin American problems which the above-mentioned seminars will promote. Unique importance would seem to attach to the selection of participants. The course should attract professionals who already have a sound and comprehensive training, and possess a good academic background or well-attested practical ability and experience. This tightening-up of the requirements will necessarily

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<sup>1/</sup> See "Bases de la reorientación del Programa de Capacitación" (INST/L.14), presented at the twelfth meeting of the Governing Council, held in Mexico on 9 and 10 December 1968.

entail changes in present conditions with respect to the amount of the fellowship grants and the periods that should be covered.

Another idea which is under consideration--and which was also discussed at the informal meeting of the Governing Council in Mexico--is that the Basic Course should be converted into a higher-level training course which could confer a diploma after two years of intensive study and the preparation of a thesis such as that required to obtain a doctorate. If this is considered to be a wise course, the necessary steps could be taken to establish the academic equivalence of these studies and to share with the universities concerned the responsibility of conferring doctorates in economic development or in planning.

All this forms part of the process of evolution and change which the Basic Course has been undergoing ever since ECLA held the first of its kind. The idea of associating the subjects taught in the Course with the current thinking that has had the strongest impact on the economic situation of the region has had much to do with these changes. One of the permanent features of this programme however, is the fact that Latin America's problems and their interpretation constitute the focal point of the whole substantive content of the Course, and the object to which the knowledge and experience it draws on are applied. In the coming phases of more fundamental change, care must be taken not to lose sight of the valuable lesson thus to be learnt from the past.

The Course on Health Planning has been so successful that the Institute has been encouraged to continue the co-operation thus established with the Pan American Sanitary Bureau and the World Health Organization (as it would have liked to do with UNESCO following the joint course on educational planning that was organized for several years). It would seem that in addition the special courses need to be diversified so as to include a number of Latin American problems about which comparatively little is known and the ideas that exist have not been duly systematized. Some specific areas, such as transport and communications, energy and natural resources, regional development, the problems of the relatively less developed countries, and others of particular significance, must be dealt with, in order to give a fuller and deeper insight into the whole development process in Latin America.

/Through its



Through its intensive courses, the Institute has done a great deal of work embracing most of the Latin American countries. Since 1962, fifty-four courses have been held in sixteen countries. In some, such as Brazil, the Central American countries, and Mexico, they have been repeated annually, and by this time several classes have graduated. These courses have served to introduce and spread a better-integrated fund of information on development and planning, and at the same time have dealt with specific subjects in each country, such as agriculture, industry, economic integration, project evaluation, etc.

There is a bigger demand for intensive courses than the Institute is able to supply. By October 1969, it had received fifteen requests to hold such courses in 1970. The best way of reconciling this demand with a realistic view of the Institute's resources and of the need to concentrate their application would be to encourage national institutions to assume responsibility for organizing and running such courses, as indeed is already happening in some cases. The Institute could provide guidance and advisory assistance for such national activities. In addition, the national courses might be combined with seminars at which the principal development concepts and problems could be brought to notice and discussed. The Institute's association with the universities in the various countries would be a specially significant feature in this connexion. In any event, if such a policy is to be put into practice it would seem advisable to promote the establishment of Institute sub-centres in some countries or groups of countries, similar to the centre which the Government of Brazil has asked the United Nations to set up to meet its immense needs. Brazil's request, submitted when it signed the Plan of Operations, not only represents solid support for the Institute, but also opens up the way to satisfying the demand for courses in Brazil.

## 2. Advisory services and projects

The Institute's advisory work has fulfilled a number of aims. Assistance has been provided in the formulation of plans and programmes in most countries of the region, and in some cases in the designing of long-term development strategies as a framework for clarifying the basic purposes of plans. The Institute has also contributed to plan implementation by strengthening national planning machinery, studying sectoral and regional questions in progressively greater depth, and improving the operational efficiency of such basic tools as techniques for short-term planning, programme and performance budgeting, public investment planning, etc.

These intensive activities have helped to metamorphose the whole planning picture in Latin America. Most countries now have planning agencies, many of them staffed by teams of technically qualified national personnel. The day of the mission long-drawn-out now seems to be past, and, as the Institute has been endeavouring to do in recent years, procedures must be sought that are more in line with the countries' present needs, although without ruling out, where justified by the circumstances, activities that may be exceptional in terms both of the resources absorbed and of the time consumed.

Advisory services must be adapted to the characteristics and circumstances of the country requesting them, and their intensity and duration must depend upon the nature of the problems concerned. On the one hand, thought should be given to the possibilities of sending missions to countries for relatively short periods; the teams would comprise both generalists and specialists in different sectors of economic activity, and would assist governments, through dialogue, in the exchange of ideas on basic topics relating to development strategy. In such cases, comparison of the experts' experience with that of national officials might help to clarify and solve national problems. In certain circumstances, governments—as has been shown by the results of recent missions of this type—want this kind of objective discussion

as a means to forming their opinions and implementing their own policy decisions. Because of the needs involved, it is advisable for such missions to be carried out by experienced Institute and ECLA staff.

On the other hand, as has been indicated, advisory missions of longer duration could be sent to tackle basic technical problems similar to those dealt with formerly by advisory groups, although it is clear that, given the progress made in most countries, the time spent on such work will not need to be as long as before. In view of the scope of their activities, and the scantiness of the Institute's resources, it would seem advisable for such missions to be carried out in conjunction with ECLA and the regional technical assistance experts of the United Nations and other agencies. Enlisting the co-operation of outside experts—apart from enriching the Institute's experience with other points of view—would make it possible to channel technical assistance resources that are at present scattered throughout Latin America into activities that are more concentrated and probably of greater benefit to governments.

Furthermore, the Institute is tending to devote increasing attention to the provision of advisory services relating to integration, not only by reason of its knowledge of the development problems of individual countries and the region as a whole, but also as a result of the basic research it has been undertaking on such matters as policies for development with integration, the trade gap, the prospects afforded by integration for the speeding-up of industrial development, criteria for the analysis of multi-national projects, etc. When the Institute's future activities in this field are under consideration, it must be borne in mind that in Latin America sub-regional agreements are being concluded within the over-all integration system of the Latin American Free-Trade Association (LAFTA). The example of the pioneer Central American integration movement has recently been followed by the Andean Group, the Caribbean countries and—with a slightly different purpose—the River Plate Basin Group.

The Institute followed with great interest the events leading up to the signing of the Andean Subregional Agreement and, at the request of the Joint Committee of the Declaration of Bogota, prepared in co-operation with ECLA a document on ways and means of linking national development plans with a view to subregional integration, which was submitted to the Committee at the meeting it held in Cartagena (Colombia) in August 1968. Recently the Institute participated in the meeting of heads of planning agencies of the Andean Group (Lima, October 1969), and was requested to draft, in conjunction with ECLA, a preliminary document on criteria and methods for joint programming and other questions relating to the co-ordination of the Andean countries' plans, and to provide technical advisory services for meetings of heads of planning agencies. The Institute is prepared to co-operate actively in any aspect of the planning and integration of the Andean Group where its assistance may be required.

It should also be mentioned that the Institute has made arrangements to co-operate with ECLA in work connected with integration in the Caribbean area.

Similarly worthy of note is the provision of advisory assistance in development planning for regions within countries, which answers a real and growing need. In addition to the longer-term work underway in the state of Minas Gerais (Brazil), the Institute is co-operating with ECLA—in response to a request from the Bolivian Government—in studying the development potential of the Santa Cruz area, in connexion with the Puerto Busch project.

As noted at the informal meeting in Mexico City, the Institute should play a more active part in the country analyses undertaken by the Inter-American Committee on the Alliance for Progress (CIAP). With this end in view, the President of CIAP has invited the Institute's participation, and the Director-General will be attending the meetings of the Committee, where he will also represent ECLA, at the request of the Executive Secretary. This will involve not only participation in the Committee's plenary meetings, but also, where possible, co-operation in the preparatory technical studies upon request. Another interesting

/suggestion also

suggestion also made at the informal meeting was that relations with the Inter-American Development Bank should be strengthened by providing it with advisory assistance in the organization of missions concerned with economic development questions.

The Institute's advisory function has enabled it to keep in close touch with developments in respect of planning and economic policy in Latin America, and to co-operate with national efforts in these fields. The indications given in the foregoing paragraphs provide a suitable basis for re-examining the ways in which the Institute should provide advisory services, as part of its essential task of contributing to the development of planning and ensuring the maintenance of unbroken contact with real conditions in the countries of the region. Moreover, its advisory activities will have to be closely linked to the seminars and exchange of ideas that were described in general outline at the beginning of this report.

There is no need to stress the major significance of projects within the Institute's work, since one of the most serious obstacles to planning is precisely the lack of projects to give concrete form to the priorities laid down in the plans.

The activities of the Institute in this field, although they have received encouragement and support, chiefly from the Inter-American Development Bank (IDB), have been much restricted by the lack of resources. Nevertheless, it has provided technical assistance to a number of countries--Bolivia, Brazil, the Dominican Republic, Ecuador, Paraguay and Venezuela--and to the Central American area, and it has co-operated in the formulation of some important national and regional projects. With regard to agricultural projects, enough experience has been acquired in the course of field work for a practical guide to the formulation of projects for the integrated development of agricultural areas to be published in the near future. Moreover, some work has been done on the analysis and evaluation of integration projects.

The Institute's activities in this field will be focused mainly on two undertakings, one of which has already been started, while the other has recently been proposed and holds out very promising prospects.

/The first

The first of these tasks is the preparation of a guide and a manual on projects. Work on these--which has already begun--is receiving substantial support from IDB. Given the amount of resources allocated to this project and the co-operation it is hoped to obtain from other national and international agencies, the guide and the manual may be expected to serve as very useful practical tools in the formulation, evaluation and execution of projects in Latin America.

The second task, which the Institute intends to embark upon forthwith, stems from a suggestion made at the informal meeting of the Governing Council in Mexico City regarding the possibility of the Institute's entering the field of pre-investment. Experience has shown the need to find some way of linking the formulation of development plans and policies with the execution of specific projects. Pre-investment programmes might meet this need, and the Institute will have to make efforts to extend its activities to this field, as another form of response to the countries' interest in making their plans more operational.

The Institute has welcomed this suggestion, which was made by representatives of the Inter-American Development Bank, with great interest, and since the Mexico City meeting it has exchanged ideas with the Bank and with some governments in the region as a first step towards undertaking work in this field.

### 3. Research

The current situation in Latin America with regard to research on development problems and policy is very different from that prevailing a few years ago. Not only has the basic economic and social context changed, but there has also been a very sharp increase in awareness of the causes and implications of the region's failure to speed up its rate of growth. In addition, the number of international and national agencies carrying out studies of Latin American conditions has risen significantly. Today, a number of countries have national research centres with the basic capacity to undertake work of this kind. The establishment of the Latin American Council for Social Sciences (CLACSO), as a co-ordinating agency for all such centres, is an example of the possibilities for co-operation among them and paves the way for these important nuclei to concentrate their pooled efforts on the key problems of Latin America's development at its present stage.

The Institute has had opportunities of observing that the region is now better equipped to undertake studies which would have been quite beyond its capacity ten years ago. The progress made in research, conducted jointly with national centres, on integration-oriented development policies is a striking example of how much has been achieved.

The increase in knowledge of the complexities of the Latin American scene, and the explicit consideration of new problems, mean that any research carried out on the region as a whole must be based on a solid ground work of national data, which invest approaches and conclusions with additional depth and detail.

Moreover, several international and inter-American agencies---in particular IDB, OAS and CIAP---each from its own vantage-point, are making important contributions to the analysis of economic and social policies. The growing interest in the region's problems, and recognition of the fact that these problems have their own peculiar features, and therefore cannot be solved by the mechanical application of theories worked out at

/the 'centre',

the 'centre', have had a salutary effect on the way in which the causes and implications of under-development are interpreted, and this has brought with it an enhanced awareness of the real situation in Latin America.

It is important to recall that the research undertaken by ECLA over the past twenty years constitutes a very sound basis for the Institute's research work. All that need be added is that the Institute itself, although it has been in existence for only a few years and the resources it can earmark for research are meagre, has already made significant, albeit partial, contributions to the understanding of such important questions as industrial development and employment problems, the trade gap, and integration, as well as to the designing of suitable instruments for the implementation of development policies, in such fields as planning techniques, project formulation and evaluation, and programme and performance budgeting.

In brief, it may be said that the frame of reference for the Institute's future research will be constituted by four main components. First, given the greater complexity of existing conditions and the increased awareness of the basic problems of development, research topics must be selected with care and analysed in depth, to which end attention must be concentrated on key questions. Secondly, the Institute's research work is closely linked to the entire system of ideas developed both by ECLA and by other agencies, which has to be constantly overhauled and brought up to date, to show the critical areas on which emphasis should be placed and research focused. Pursuant to this approach, the Institute must make more and more use of the increasing research capacity that has been growing up in Latin America, and promote joint activities in fields which are considered of basic importance for an understanding of the economic and social phenomena of the region and for policy proposals. Fourthly, the Institute should maintain very close contacts with other international agencies (IDB, CIAP, OAS, FAO, UNESCO, etc.) and with academic centres abroad that are carrying out studies on Latin America.

/These indications



These indications should serve as a guide for the Institute's research activities, which in the last analysis, however, will be based on an interpretation of the economic and social development of Latin America as seen in a present-day perspective, which will make its essential aspects more clearly discernible. With this end in mind, the Institute will focus its efforts in 1970 on attempting to systematize the ideas that have emerged over the past twenty years in a series of interpretations of the economic and social development of Latin America although so far no effort has been made to marshal them methodically. This will have to be done in a spirit of objective criticism, discarding anything that experience has shown to be valueless, and identifying existing lacunae positive contributions. The undertaking is expected to culminate in the production of a book, in which both Institute and ECLA economists will collaborate.

The work done in this connexion will have to be consistent with present-day Latin American needs and realities, and the approach adopted must be strictly scientific and objective, in line with the traditions of freedom of thought that have always characterized the Institute's activities.

#### 4. Publications

The publication of textbooks and manuals is of major importance both for training programmes and in order to satisfy the increasingly urgent need to make the Institute's work more widely known.

Our first printed publications appeared barely three years ago, and several texts have already been brought out in book form and in the various series of Cuadernos. The staff is working hard on about fifteen more titles that are to be published in the near future.

Emphasis must be placed on the publication of textbooks and manuals. Technical handbooks must be prepared in the main branches of sectoral planning, as has already been done in respect of industrial planning and performance budgeting; work is under way on annual operational plans, public sector, planning, monetary and financial programming, and project design and analysis. For training purposes, however, the manuals must also cover other fields, since they will be of the greatest use as instruments of diffusion in the universities and other teaching centres in the Latin American countries.

New approaches and interpretations relating to various aspects of development and planning can be published in the series of preliminary research findings (anticipos de investigación) which the Institute is already bringing out in its Cuadernos. But it is also planning to publish a periodical which will be livelier and is sure to be more widely read, thus stimulating public discussion, from which new ideas will doubtless emerge. This periodical will also comment on the activities of the planning offices in order to serve as a means of communication between them, and will report on the results of controversies and discussions on economic and social topics relating to Latin America, while at the same time supplying information on the Institute's main efforts in the fields of research, advisory assistance and teaching.

All these publications, including the periodical, will serve as a link between the Institute and the universities and research centres within and without the region, and will make the Institute familiar to the public at large. The need to bring out its publications in other languages, particularly Portuguese and English, has been much felt, and this aim must be achieved as quickly as possible.

/5. The future

5. The future of the Institute and its financing problems

At the informal meeting held in Mexico City, the subjects of discussion included not only the lines on which the Institute might in future conduct its main activities, but also its financial problems. It should be recalled that from the standpoint of financing the Institute's existence has been divided into two phases. During the first of these, which was of five years' duration, the basic financing consisted in an allocation from the United Nations Special Fund and a contribution made by the Inter-American Development Bank (IDB) on behalf of the governments. In the course of this initial phase, additional financing was obtained from the Special Fund, with "counterpart" contributions from the Latin American governments, for the establishment of the Advisory Services Division. In the second phase, which began on 1 July 1967 and is scheduled to last four years, the Institute is again being financed as a Special Fund project, with a substantial contribution from the Inter-American Development Bank, and "counterpart" contributions pledged directly this time by the governments of the region.

The vital importance of these financial contributions must be clearly emphasized, and the fullest and most appreciative recognition must be accorded to the generous support given by the Special Fund and the Inter-American Development Bank, as well as to the substantial backing received from the governments of the region. Nevertheless, as was pointed out at the Mexico meeting, formulas must be devised which will enable the Institute to continue its activities on permanent bases, and no longer on the shaky financial footing signified by dependence on periodic negotiations for funds, since financial instability involves, inter alia, waste of effort and lack of the right atmosphere for work.

The Institute has already demonstrated the importance of its activities in Latin America. And these activities must be founded on a bedrock of intellectual independence; for only thus will it be able to play a really significant part in the elucidation and solution of

/Latin America's

Latin America's serious development problems. If it is to enjoy this intellectual independence, which is essential to its work, the Institute must be guaranteed permanent financing and spared financial vicissitudes, at least in so far as its basic cadres are concerned. This is why it was so strongly urged at the Mexico meeting that the sources of financing should be international organizations such as the United Nations or the Inter-American Development Bank, and that the risks implicit in dependence on sporadic contributions should be averted.

In this connexion, it is worth recalling a passage in the Mason-Iglesias report prepared during the negotiations relating to the second phase of the Institute:

"During Phase II it is expected that Latin American governments will make a substantial direct contribution. We don't believe, however, that the whole or even a major part of the Institute's expenditure can be financed from this source. To attempt to secure agreement from twenty governments to a programme of long-term financing is, we think, to attempt the impossible and an insistence that this be done is equivalent to an insistence that the Institute be dissolved. We would hope that individual governments would continue their direct contributions and even increase them, but we do not expect that a majority of the financing will come from this source".

Since the date of initiation of the Second Development Decade promoted by the United Nations is close at hand, an endeavour must be made to ensure that the Institute's next phase--scheduled to begin on 1 July 1971--is established for a much longer period than the first two. As a United Nations Agency already doing effective work in the field of planning, the Institute will undoubtedly be instrumental in furthering the aims of the Second Development Decade in Latin America, since planning is bound to play a vital role in government efforts to attain appropriate development targets.

/The foregoing

The foregoing remarks pave the way for a preliminary analysis of a future financing system which will be conducive to greater continuity in the Institute's basic work and will safeguard its intellectual independence. Pursuant to the suggestions put forward at the informal Mexico meeting, various financing procedures have been under study.

Before setting forth possible alternatives for financing the Institute as from mid-1971, the bases on which its future activities should be organized must be defined. To that end, it is needful to bear in mind the objectives and lines of action formulated in the present report with a view to improving and expanding the Institute's capacity to provide services for the countries of the region, both through the study of crucial development problems and proposals for policies to overcome them, and through direct action. It has been suggested that these ends might be served by basing the structure of the Institute on a permanent nucleus comprising the senior executive staff, the personnel engaged in training and research, and those responsible for directing advisory services and work on projects.

A further requisite will be a supporting team whose continuity is ensured for several years, and with whose help the Institute can undertake and even expand the direct service activities which it has been developing to an increasing extent, particularly in order to meet the requests of governments and international agencies for advice on planning and projects, in line with the guiding principles laid down in section 2 of the present report.

Preliminary estimates have been made of the financial resources that would be required, firstly for the basic nucleus, and secondly for the supporting team dealing with advisory services and projects. These estimates, which are set out in detail in tables 1 and 2, amount to annual sums of approximately 1 157 million dollars for the nucleus and 517 000 dollars for the supporting team.

The best means of obtaining the Institute's essential objectives might lie in the suggestion that the nucleus and the supporting team should be incorporated in the United Nations Secretariat. This would not appear to be a viable solution over the short term, in view of the

/financial limitations

financial limitations which are hampering the United Nation's activities in general. Accordingly, it is felt that an alternative proposal in respect of sources of financing, should be put forward, to provide a basis on which the Council can discuss and map out the action that should be taken to establish the Institute's key activities on sounder and more permanent bases. The alternative possibility in question would be to seek financing for the basic nucleus from the United Nations Development Programme, the Institute being regarded as a continuing project sui generis, with phases of longer duration than the first two. It is considered that a suitable duration would be the period covered by the Second Development Decade. If this second alternative were adopted, financing for the supporting team would be obtained from other sources. One suggestion is that the United Nations Office of Technical Co-operation (OTC) might supply the Institute with financing for the personnel engaged in providing advisory assistance in planning, and that the Inter-American Development Bank might finance the staff concerned with pre-investment activities and projects. This financing would have to cover a minimum period of five years, so that the supporting teams could duly fulfil their role as such.

With respect to the financing of the Institute as a United Nations Development Programme (Special Fund) project, it must be pointed out that it is customary in the case of such projects for governments to make cash contributions. The Institute's experience in Phase II has been enlightening in regard to the difficulties of securing payment of such contributions under this system. The problem should be given special consideration, for while this is a troublesome way of obtaining funds, on the other hand expenditure far heavier than the cash contributions payable is incurred by the countries in the shape of financing for activities which the Institute undertakes at the request of governments in the fields of training, advisory assistance and research. For example, when the Institute holds a training course, the sponsoring governments or national institutions defray the local costs, continue to pay the salaries of participating government officials /and sometimes

and sometimes in addition finance fellowships for the duration of the course. In the case of advisory services provided for individual countries, the same observation holds good if the cost borne by governments for the assignment of counterpart technicians to collaborate with the Institute's team of experts in the field, and the local cost of transport, secretarial assistance, etc., are duly assessed. It often happens, too, that the work is continued at the Institute headquarters, in which case the countries finance the travel and subsistence expenses of their teams of experts. The same applies to research projects where the participation of groups of experts from the countries and institutions with which the Institute is collaborating keeps specialists engaged in joint activities for long periods.

The real impact is difficult to measure, since it does not lend itself to precise assessment in quantitative terms, but approximate figures can be established which give some idea of the scale of the support given by the countries of the region to the Institute's work. If a more flexible criterion were applied, these figures could be taken to represent the value of the counterpart contribution that the governments should make to this UNDP project, which, by its very nature as an economic and social instrument in Latin America within the framework of the United Nations, and in view of the broad objectives it pursues in respect of improving development conditions in the various countries, does in fact seem to constitute a project sui generis.

For illustrative purposes, table 3 presents a statement of the accounts that have been kept of the countries' contributions to the different activities.

Apart from the work done by the basic nucleus and the supporting team, it is conceivable that, as has happened hitherto, other activities may be undertaken for which ad hoc financing will be required. These will include, for example, advisory services and projects for which payment is made, either by the governments themselves or under special agreements with national and international financing institutions.

/On the

On the other hand, for certain special training and research activities, the Institute might obtain funds from foundations, universities and other sources, as in the case of the generous donation made by the Government of the Kingdom of the Netherlands. The possibility should be studied in detail and depth, and from the Governing Council's discussion of its modifications or even different alternatives will no doubt emerge, which will enable the Office of the Director-General to lay down clear-cut guidelines for the intensive consultations which will have to take place during the first half of the coming year, to ensure the Institute the basic financing it needs if it is to fulfil the objectives underlying its establishment.



b. Relations with other agencies

One of the Institute's most striking features has been the close co-operation it has maintained with numerous international organizations, national development institutions, universities and research centres. Their material support has enabled it to undertake much more far-reaching activities in the past than would have been possible with its own limited resources. Even more noteworthy, however, is the fact that its linkage with such agencies has kept all its activities, without exception, in direct and lively contact with a wide range of experience in respect of economic and social policies and with the thinking generated in those fields. Yet its firm intention to establish a freer exchange of views with centres and leading figures inside and outside Latin America has not been completely fulfilled.

Even at the risk of omitting to mention other examples of valuable co-operation, emphasis must be placed on the resolute support given by the Inter-American Development Bank, not only because of its substantial contribution to the over-all financing of the Institute, but also because of the backing it has provided for several of the Institute's activities and the positive attitude which its directors have always adopted towards joint projects. The Institute believes that it has been equally responsive, co-operating with the Bank whenever its collaboration has been requested, as shown by the participation of the Director-General and other staff members of the Institute—and of ECLA—in the study on economic development policy and the mobilization of financial resources. The pre-investment field, which is at present being explored, offers another promising area for a task of the greatest importance in relation to the aims of both institutions.

In addition, as mentioned above, the necessary conditions have been created for a closer association with the Organization of American States (OAS) and, in particular, with the Inter-American Committee on the Alliance for Progress (CIAP) in the study of development trends and plan implementation in the Latin American countries, which will no doubt bring mutual benefit to the organizations concerned.

/The Institute

The Institute will maintain and even strengthen the firm relations with the agencies of the United Nations family which have been established in recent years. Thus, joint work is being carried out with the Pan American Health Office, through the Pan American Health Programme established within the framework of the Institute, in the training of health planners and in research aimed at closer integration between economic development planning and the needs and targets of health plans. With the International Labour Organisation it is working in the fields of employment and human resources planning. Without the continuing generous support of the United Nations Children's Fund (UNICEF), the Institute would have been unable to do much in connexion with social development, particularly as regards the burning problems of Latin American youth. Successful results have been obtained from the agreement with the Latin American Demographic Centre (CELADE) respecting the incorporation of population problems in the research which is being conducted in conjunction with national centres co-ordinated by the Latin American Council for Social Sciences (CLACSO), on the aforementioned important subject of integration-oriented development policies. Constructive relations have also been maintained with the Food and Agriculture Organization of the United Nations (FAO), the United Nations Industrial Development Organization (UNIDO), the United Nations Conference on Trade and Development (UNCTAD), the United Nations Research Institute for Social Development (UNRISD), the United Nations Educational, Scientific and Cultural Organization (UNESCO) and other United Nations agencies. The International Monetary Fund (IMF) has co-operated continuously in the Institute's teaching activities.

The Institute's concern with economic integration problems in Latin America is also evident in its close relations with the Latin American Free Trade Association (LAFTA). In Central America it has collaborated with SIECA in devising bases for a development strategy for the area as a whole, in the study of the area's trade gap, and in promoting multinational projects; it has embarked upon a highly promising collaboration with the Andean Group, mainly in connexion with the co-ordination of member countries' plans and with the industrial aspects of integration in this subregion; and support has also been given to ECLA in its integration activities in

/the Caribbean

the Caribbean countries. In the work undertaken by the Institute in the field of integration, close contact has always been maintained with the activities of the Institute for Latin American Integration (INTAL).

Support has also been received from the Agency for International Development of the United States Government and the Government of the Federal Republic of Germany in financing fellowships for the Institute courses; from the Organization for Economic Co-operation and Development (OECD) in carrying out a survey on the industrial entrepreneur in Mexico; from the Université de Paris in research on labour sectors; and from the French Government, which contributed valuable experience in short-term planning. Thanks to the co-operation of the Chilean Development Corporation (CORFO), agreements have been concluded on collaboration in budgeting and social questions, and discussions are in process concerning new lines of activity in connexion with projects.

The Government of the Kingdom of the Netherlands has also provided substantial contributions which in the last few years have enabled the Institute to expand its research potential on a considerable scale, and in the course of this year it made another generous donation for use as from 1970, which prompts the Director-General to express special gratitude for so exceptional a distinction and proof of confidence in the Institute.

Lastly, the United Nations Development Programme (UNDP) and the United Nations Secretariat--through the Office of Technical Co-operation (OTC)--have not only made a decisive contribution on the material plane, but have given the encouragement and stimulus required for a resolute approach to continuing and increasingly constructive action on the Institute's part in the future.

The hospitality and facilities extended by the Government of Chile have unquestionably been an important factor in the development of the Institute's work.

As noted throughout the analysis of the Institute's activities and the proposals for their future orientation, the tightening-up of co-ordination and collaboration with ECLA has been a permanent and highly favourable feature. The proposed guidelines for the Institute's future action should take into account this essential aspect of the relationship between the

/two agencies,

two agencies, so that they can both provide Latin America with interpretations of its development problems, propose specific economic and social policies for overcoming them, and carry out direct activities in support of the governments' efforts in that direction.

The Director-General would like to reaffirm his gratitude for the support received from national and international institutions in the form of resources and suggestions for improving the Institute's work. He also states his firm determination to strengthen still further the links with those agencies, and extend them to others. The attainment of this goal should help the Institute to concentrate its efforts in the spheres of greatest importance for development and planning, and enable it to absorb experience and ideas--wherever they may be applied or generated--which will be of use in tackling more successfully than in the past the problems that beset the development of Latin America.

Table 1

ESTIMATED ANNUAL COSTS OF THE INSTITUTE  
FROM 1 JUNE 1971

	<u>Staff</u> (Number)	<u>Annual Cost</u> (dollars)
1. <u>Basic Unit</u>		<u>1 157 000</u>
1.1 <u>Professionals</u>	<u>37</u>	<u>736 000</u>
Director-General's Office	6	166 000
Training Programme	8	137 000
Research Division	12	209 000
Advisory Services Division	6	127 000
Projects Division	3	64 000
Publications Division	2	33 000
1.2 <u>Consultants</u>		<u>60 000</u>
1.3 <u>Secretariat</u>	<u>14</u>	<u>73 000</u>
1.4 <u>Administrative Services</u> <sup>a/</sup>	<u>11</u>	<u>48 000</u>
1.5 <u>Official travel</u>	-	<u>60 000</u>
1.6 <u>Equipment and supplies</u>	-	<u>50 000</u>
1.7 <u>Other administrative expenditure</u> <sup>b/</sup>	-	<u>80 000</u>
1.8 <u>Publications fund</u>	-	<u>50 000</u>

a/ This estimate has been made on the assumption that a large part of the administrative expenditure of the Institute (personnel, finance, general services, etc.) would be absorbed by ECLA.

b/ Maintenance of building, light, heating, etc.

Table 2

	<u>Staff</u> (Number)	<u>Annual Cost</u> (Dollars)
2. <u>Supporting team</u>		<u>517 000</u>
2.1 <u>Professionals</u>	<u>18</u>	<u>351 000</u>
Advisory Services Division	9	161 000
Projects Division	5	86 000
Sectoral experts	5	104 000
2.2 <u>Consultants</u>		<u>60 000</u>
2.3 <u>Secretariat</u>	<u>7</u>	<u>36 000</u>
2.4 <u>Official travel</u>		<u>40 000</u>
2.5 <u>Equipment and supplies</u>		<u>30 000</u>

Summary of tables 1 and 2

1. Basic unit	1 157 000
2. Supporting team	<u>517 000</u>
	1 674 000

Table 3

ESTIMATED INDIRECT CONTRIBUTIONS BY GOVERNMENTS IN 1969

(As of 31 December 1969)

	<u>Training</u>	<u>Research</u>	<u>Advisory services</u>	<u>Projects</u>	<u>Total</u>
	(Dollars)				
Argentina	3 700	4 000	-	-	7 700
Bolivia	51 173	-	-	-	51 173
Brazil	137 363	-	57 400 <sup>a/</sup>	-	194 763
Chile	28 380	4 200	32 500	-	65 080
Colombia	2 400	-	-	-	2 400
Costa Rica	3 300	-	-	-	3 300
Cuba	5 380	-	-	-	5 380
Ecuador	2 650	-	12 700	-	15 350
El Salvador	9 600	-	-	-	9 600
France	2 000	-	-	-	2 000
Guatemala	4 100	-	-	-	4 100
Honduras	5 570	-	900	400	6 870
Mexico	35 750	5 000	-	-	40 750
Panama	36 600	-	-	-	36 600
Paraguay	3 900	-	-	-	3 900
Peru	29 717	6 300	1 900	300	38 217
Trinidad and Tobago	1 600	-	-	-	1 600
United Kingdom	2 000	-	-	-	2 000
Uruguay	3 900	-	-	-	3 900
Venezuela	<u>19 500</u>	<u>11 100</u>	<u>-</u>	<u>1 000</u>	<u>31 600</u>
	388 283	30 600	105 400	1 700	525 983

<sup>a/</sup> The figures for advisory services to Minas Gerais (Brazil) in October-November 1969 are estimates.





ANNEX 4

LIST OF INTENSIVE COURSES AND SPECIAL COURSES GIVEN  
BY THE INSTITUTE FROM 1962 TO THE PRESENT TIME



LIST OF INTENSIVE COURSES AND SPECIAL COURSES GIVEN BY  
THE INSTITUTE FROM 1962 TO THE PRESENT TIME\*

I. INTENSIVE COURSES

<u>Country</u>	<u>City</u>	<u>Subject</u>
<u>1962</u>		
Brazil	Rio de Janeiro	Economic development problems
Bolivia	La Paz	Economic development problems
Mexico	Mexico City	Economic development problems
Uruguay	Montevideo	Economic development problems
Paraguay	Asunción	Economic development problems
Peru	Lima	Economic development problems
<u>1963</u>		
Brazil	Belem	Economic development problems
	Rio de Janeiro	Economic development problems
	Curitiba	Economic development problems
Mexico	Mexico City	Planning and development and a short course on educational planning
Uruguay	Montevideo	Economic development problems
Ecuador	Quito	Economic development problems
Peru	Lima	Economic development problems
Central America	San José	Economic development problems
Dominican Republic	Santo Domingo	Economic development problems
<u>1964</u>		
Brazil	Belo Horizonte	Economic development problems
	Porto Alegre	Public sector programming and agricultural programming
	Fortaleza	Public sector programming and regional programming
Peru	Lima	Training common to all participants and the following specialties: agricultural programming, transport programming, industrial programming and public sector programming

\* For further details on the courses listed here, see the report of the Director-General of the Institute to the Governing Council (half-yearly at first and afterwards yearly).

Central America	Guatemala	Training common to all participants and the following specialties: agricultural programming and industrial programming
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1965

Brazil	Belem	Economic development problems
	Florianapolis	Economic development problems
	Recife	Economic development problems
Bolivia	La Paz	Economic development problems
Central America	Tegucigalpa	Central American integration
Ecuador	Guayaquil	Economic development problems
Mexico	Mexico City	Economic development problems
Peru	Trujillo	Economic development problems

1966

Colombia	Bogotá	Agricultural planning
Brazil	São Paulo	Industrial programming
	Vitoria	Project preparation and evaluation
	Salvador	Regional planning and project preparation and evaluation
Mexico	Mexico City	Agricultural planning and public sector planning
Central America	Managua	Central American integration and project preparation and evaluation
Dominican Republic	Santo Domingo	Planning and development

1967

Brazil	Fortaleza	Public sector planning and agricultural programming
	Curitiba	Human resources planning and industrial planning
	Rio de Janeiro	Industrial planning
Mexico	Mexico City	Industrial planning and budget programming
Dominican Republic	Santo Domingo	Economic development problems

1968

Brazil	Belem	Agricultural planning and human resources planning
	Porto Alegre	Agricultural planning and public sector planning
	Recife	General programming
Chile	Santiago	Operational plans and programme and performance budget techniques
Mexico	Mexico City	Basic Course, agricultural planning and budget programming

/Ecuador

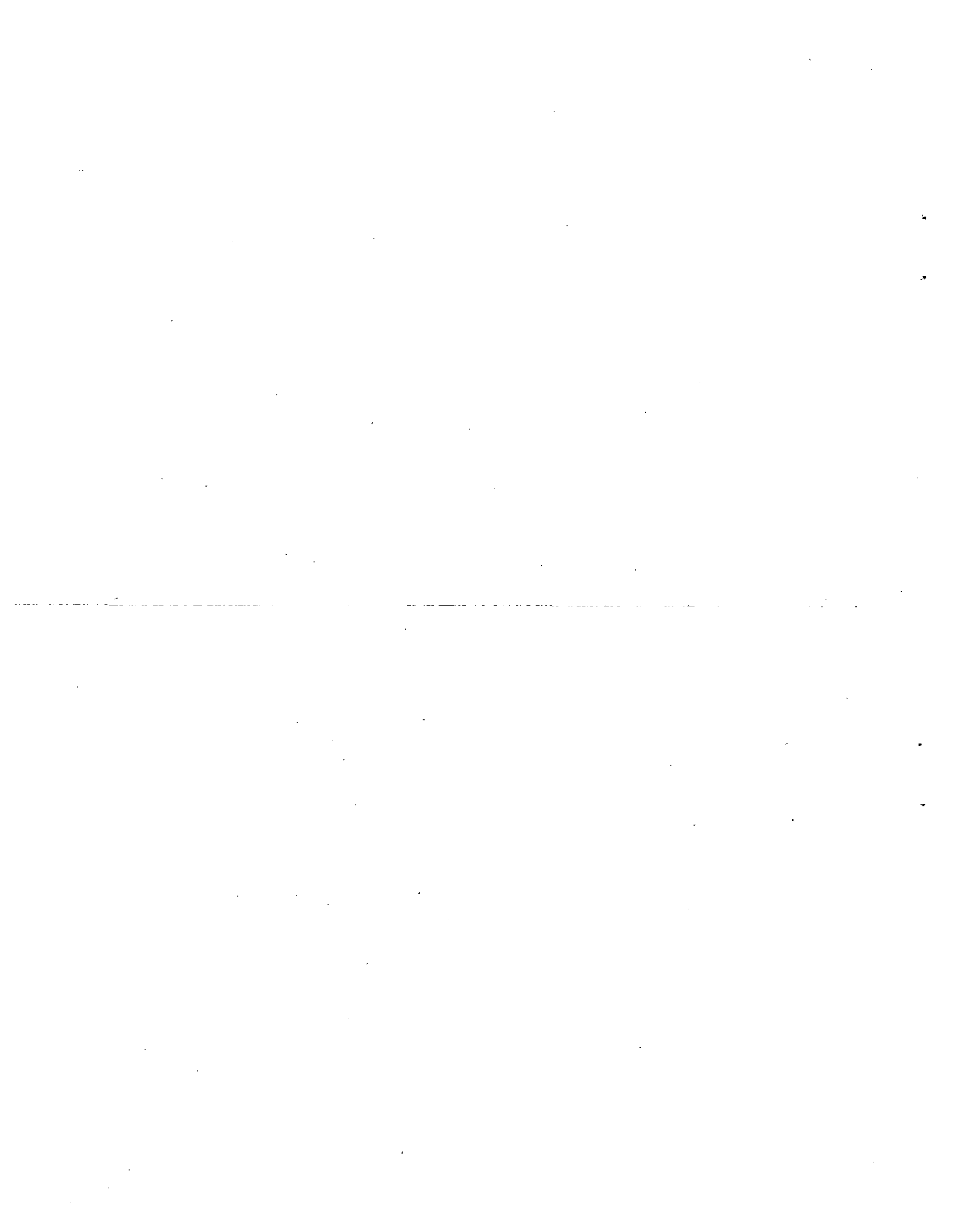
Ecuador	Cuenca	Economic development problems
Bolivia	La Paz	Operational plans
Central America	San Salvador	Planning and development, and trade policy
<u>1969</u>		
Brazil	Rio de Janeiro	Housing planning
	Vitoria	Planning and development
	Brasilia	Agricultural planning
Bolivia	Santa Cruz de la Sierra	Economic development problems
Mexico	Monterrey	Economic development problems
Peru	Lima	Planning, and the following specialties: external sector, industrial planning and public sector planning
Central America	Panama	Annual operational plans
<u>1970</u>		
Brazil	Manaos	Economic development problems
	Belo Horizonte	Industrial planning
	Campinas	General planning
Mexico	Mexico City	National accounts
Peru	Lima	Economic development problems. Training common to all participants, and the following specialties: external sector and regional planning
<u>1971</u>		
Brazil	Brasilia	Regional development programming
	Bahia	Development and economic planning
Bolivia	La Paz	Economic development problems
Peru	Lima	Development planning

II. SPECIAL COURSES

<u>Year</u>	<u>Course</u>	<u>Date</u>	<u>City</u>	<u>Country</u>
1962	Health planning	9-8/12-21	Santiago	Chile
	Educational planning	9-24/12-14	Santiago	Chile
1963	Health planning	9-2/12-6	Santiago	Chile
	Educational planning	7-8/10-18	Santiago	Chile
1964	Health planning	9-7/12-11	Santiago	Chile
	Educational planning	8-17/11-6	Santiago	Chile
1965	Health planning	9-6/12-11	Santiago	Chile
	Educational planning	8-15/11-5	Buenos Aires	Argentina
1966	Health planning	9-12/12-16	Santiago	Chile
	Educational planning	8-1/10-21	San José	Costa Rica
	Housing planning	5-2/7-22	Santiago	Chile
	Economic development and planning for trade union leaders	4-4/5-14	Santiago	Chile
1967	Health planning	9-11/12-15	Santiago	Chile
	Educational planning	10-2/12-7	Santiago	Chile
1968	Health planning	8-5/11-22	Santiago	Chile
	Annual operational plans	26-2/4	Santiago	Chile
	Human resources planning	9-23/12-13	Santiago	Chile
1969	Health planning	7-28/11-14	Santiago	Chile
1970	Health planning	7-27/11-13	Santiago	Chile
	Human resources planning	5-18/8-28	Santiago	Chile
	Regional planning	8-31/10-3	Santiago	Chile
1971	Regional planning	8-2/11-12	Santiago	Chile

ANNEX 5

PROSPECTO CURSO DE DESARROLLO Y PLANIFICACION 1971

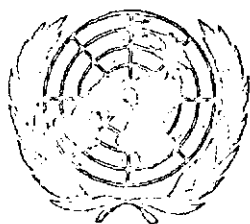




INSTITUTO LATINOAMERICANO DE PLANIFICACION ECONOMICA Y SOCIAL

CURSO DE DESARROLLO Y PLANIFICACION

1971



Santiago de Chile

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CURSO DE DESARROLLO Y PLANIFICACION

1971

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INSTITUTO LATINOAMERICANO DE PLANIFICACION ECONOMICA Y SOCIAL

Director General

Raúl Frebisch

PROGRAMA DE CAPACITACION

Director

Ricardo Cibotti

Subdirector

Arturo Núñez del Prado

Oficial de Programas

Josie Carr

\*

Jefe Administración y Finanzas

Alfonso Arboleda

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## CURSO DE DESARROLLO Y PLANIFICACION

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El Instituto Latinoamericano de Planificación Económica y Social es un organismo creado bajo la égida de la CEPAL y establecido el 1º de julio de 1962 como proyecto del Fondo Especial de las Naciones Unidas y con el apoyo del Banco Interamericano de Desarrollo (BID). Tiene por objeto proporcionar, a solicitud de los gobiernos respectivos, servicios de capacitación y asesoramiento en América Latina, y realizar investigaciones sobre planificación. Sus funciones principales son:

1. Ampliar los conocimientos técnicos de los funcionarios y especialistas latinoamericanos mediante cursos de capacitación y adiestramiento directo en el servicio.
2. Ayudar a los gobiernos a establecer las organizaciones institucionales y técnicas requeridas para llevar a cabo más eficazmente la planificación del desarrollo económico y social.
3. Asistir a los gobiernos, en un plano técnico, en la preparación de sus programas de desarrollo económico y social.
4. Efectuar los estudios necesarios para el mejoramiento de las técnicas de planificación aplicadas en América Latina.

#### PROGRAMA DE CAPACITACION

Las actividades de capacitación del Instituto, de las cuales este prospecto detalla la parte correspondiente al Curso de Desarrollo y Planificación a realizarse en 1971, incluyen también cursos intensivos - que se cumplen en los diversos países a petición de sus respectivos gobiernos - y cursos especiales sobre otros temas vinculados a la planificación general del desarrollo.

## CURSO DE DESARROLLO Y PLANIFICACION

### Estructura y contenido general

#### I. FUNDAMENTOS Y OBJETIVOS DEL NUEVO CURSO

1. Como ya se expuso en repetidas oportunidades, en documentos internos, informes al Consejo Directivo, discusiones en general, etc., el Programa de Capacitación tuvo como finalidad permanente colaborar en la formación de los cuadros técnicos para los mecanismos y procesos de planificación de los países latinoamericanos. Ello se realizó atendiendo a las condiciones reales en que se han desarrollado dichos procesos y en ocasiones, adelantándose a su evolución. El cambio que experimentó el Curso Básico en 1962 respondió, en gran medida, a este tipo de inquietud. Asimismo, tal transformación se apoyó en la experiencia acumulada durante el período previo, no sólo en lo que respecta a la investigación de los problemas del desarrollo latinoamericano, sino también en lo referente a los trabajos de asesoría en los países. Desde 1962 se realizaron continuas modificaciones en diferentes materias de dicho Curso, que respondieron a causas similares.

2. Durante 1970 se redujo la actividad docente del Instituto, y hubo oportunidad de examinar a fondo la estructura y los programas del Curso Básico, tanto en la etapa de formación común como en las especialidades. Este análisis sirvió de base para elaborar una nueva estructura del Curso de Desarrollo y Planificación.

3. Los antecedentes anotados se caracterizan por un trasfondo que se relaciona con la evolución de los procesos económicos, sociales y políticos registrados en la última década y con el papel que la planificación estuvo desempeñando.

Es indudable que durante los últimos años se advirtieron modificaciones en el comportamiento de los agentes económicos y grupos sociales. En algunos casos se notan cambios importantes, como los referidos a las actitudes de la juventud. En otros se consolidan ciertas tendencias, que presentan variaciones con relación al período de postguerra, como las vinculadas al capital extranjero, la industrialización y el financiamiento externo. Se intentan procesos de integración multinacional. En algunos países se logran tasas de crecimiento elevadas sin que aparentemente se modifiquen sus bases estructurales. Se agudizan problemas como los del subempleo, marginalidad y condiciones sociales de vastos sectores de población. Nuevos grupos políticos adquieren gravitación; se ensayan diversos esquemas de gobierno. Las universidades adoptan procesos de reforma que no sólo abarcan los contenidos académicos de sus facultades, sino que tienden

también a redefinir su papel y función con respecto a la sociedad. Además, en el ámbito internacional, tanto en lo político como en lo económico, han ocurrido cambios considerables.

Sin pretender que lo anterior constituya una lista exhaustiva y mucho menos una interpretación de los hechos que afectaron América Latina durante el pasado decenio, no deja de evidenciarse que la política de desarrollo que un país quiera llevar a la práctica posee nuevas características, está sujeta a condicionantes y restricciones diferentes y opera en un ámbito social distinto.

4. En lo que respecta a los procesos de planificación, después de la Carta de Punta del Este se crearon mecanismos en prácticamente todos los países de la región y la idea misma de la planificación fue aceptada y promovida en los medios oficiales. Sin embargo, como es fácil comprobar, en el transcurso del decenio algunos de esos mecanismos se tornaron menos importantes dentro de la administración pública, van quedando aislados de la esfera política y tienen una intervención poco definida en la adopción de decisiones. También, paradójicamente, elevan su nivel técnico en el ámbito de ciertos aspectos metodológicos.

5. Dentro de este nuevo contexto de problemas, algunos de antigua data pero que fueron adquiriendo especial significación, el Instituto ha trazado líneas de política que revelan claramente la firme intención de seguir colaborando en el progreso del pensamiento económico y social en América Latina. Son ejemplos pertinentes la investigación que se inicia sobre la reinterpretación del desarrollo de la región y sus principales opciones futuras, los trabajos sobre análisis de la integración latinoamericana, tanto regional como subregional; las investigaciones sobre tecnología y urbanismo; los estudios sobre los aspectos relativos a la planificación regional, y otros que se relacionan con el campo social, etc.

El nuevo Curso de Desarrollo y Planificación pretende responder a las inquietudes antes planteadas. Para ello se cuenta con la experiencia positiva y valiosa que suministran las labores docentes realizadas durante casi un decenio y los resultados de las investigaciones efectuadas durante ese lapso. Además, al mismo fin apuntan las actuales investigaciones.

6. De acuerdo con las preocupaciones hasta aquí planteadas, se ha venido perfilando para este Curso un objetivo que se relaciona con un tipo de función, en el ámbito de la administración pública que debe ser promovida y perfeccionada. Se trata de facilitar la vinculación entre los centros de decisión política del gobierno y los equipos técnicos que

operan en diferentes niveles de la administración. No es común encontrar que exista, entre los medios políticos y los técnicos, un sistema de fluidas relaciones que permitan tras-pasos de información oportuna, planteamientos de condicionantes técnicas a las opciones políticas, definición de marcos de referencia políticos que encuadren las alternativas técnicas, etc. Reconociendo que la racionalidad del ámbito político no coincide con la propia del ámbito técnico, deben buscarse formas o funciones que permitan darle la mayor coherencia posible.

Facilitar dichas relaciones es inherente a la eficacia y viabilidad de la planificación. Por ello, en el Curso se considerará la función antes enunciada dentro del marco de los mecanismos y procesos de planificación, lo que evidentemente condiciona el tratamiento de dicho proceso, ya que implicará abordar una temática que supera el campo puramente metodológico. Así, se estima que el análisis y la discusión de importantes problemas del desarrollo latinoamericano en sus aspectos económicos y sociopolíticos debe conformar, al igual que los aspectos puramente técnicos, uno de los principales elementos del Curso. De la misma manera, se tratará de orientar las cátedras y los seminarios de discusión hacia un planteamiento integral del desarrollo y la planificación, evitando la parcialización sectorial de esos procesos, pero sin desconocer que inevitablemente habrá que ir enfocando con criterio lógico temas que tendrán cierto grado de especificidad.

7. Es necesario destacar, finalmente, el marcado interés para que el diálogo y el intercambio de experiencias entre participantes y funcionarios del Instituto constituyan en este Curso una modalidad permanente en el examen de los problemas, tanto generales como particulares, que afectan al desarrollo latinoamericano. Superfluo parece insistir sobre la innegable ventaja que significa este expediente en la interpretación del sub-desarrollo y en la evaluación de políticas para superarlo.

Con el propósito de que el postulante tenga una clara idea de los objetivos, nivel y mecanismos del Curso, se ofrece en seguida una exposición pormenorizada del mismo. De esta manera se pone a su alcance anticipadamente no sólo la información mínima indispensable, sino también elementos de juicio sobre sus contenidos, criterios y finalidades, todo ello para su mejor y más oportuna orientación.

## II. ESQUEMA GENERAL DEL CURSO

1. Se ha previsto que este Curso comprenda tres tipos principales de actividades docentes: un programa académico, un programa de seminarios de discusión de los principales proble



mas del desarrollo de América Latina, y un conjunto de investigaciones que realizarán los participantes bajo el sistema de tutoría. Estas tres actividades son complementarias y se realizarán simultáneamente a lo largo de todo el período que abarcará el Curso.

2. Las consideraciones que han llevado al planteamiento de tales actividades pueden sintetizarse así:

a) Se ha observado que en muchos países las oficinas de planificación no responden con agilidad a los requerimientos de los gobiernos en la búsqueda de soluciones a problemas concretos a corto, a mediano o a largo plazo. Estas oficinas parecen centrar su atención sobre aspectos más vinculados a las metodologías de proyecciones y otras técnicas similares del cálculo económico, descuidando, en parte, la identificación y dilucidación de problemas que el proceso de desarrollo debe superar y que, en algunos casos, constituyen la clave de situaciones realmente críticas.

b) Lo anterior implica, en esencia, como ya se advirtió, una actitud que dificulta la vinculación de los mecanismos de planificación con los centros de decisión a nivel político. Es oportuno subrayar que éstos, por su propia naturaleza, plantean el proceso de desarrollo en términos de soluciones a problemas contingentes.

c) El Instituto, en los últimos años, encaró numerosas investigaciones en el ámbito económico y social y adquirió experiencia en sus labores de asesoría relacionadas con enfoques, análisis y planteamientos de líneas de solución a varios problemas cruciales para definir políticas de desarrollo.

d) La experiencia de los cursos anteriores del Programa de Capacitación, especialmente en cuanto a las actitudes de los mejores alumnos de cada grupo, indica una clara tendencia al análisis y la discusión en profundidad acerca de la interpretación de los problemas del subdesarrollo.

De todos modos, no puede estructurarse un curso alrededor de la discusión de problemas fundamentales, donde los participantes aporten su experiencia, sin realizarlo dentro del contexto de un conocimiento teórico, conceptual y práctico, si se pretende que en estas discusiones predominen la profundidad, el rigor y la objetividad. Por ello es necesario un programa de cátedras que brinde los conocimientos antes indicados, sin desconocer que en un período limitado como el del Curso sólo es posible transmitir a los participantes los fundamentos conceptuales y teóricos que les permitan continuar perfeccionándose en el futuro. Más aún, como la dinámica de los problemas observados durante las últimas décadas no tiene

por qué detenerse, es posible prever el surgimiento de nuevos problemas cuyo análisis se facilitaría si se cuenta con dicha base conceptual y teórica. Asimismo, la experiencia de los cursos anteriores muestra que la realización por los alumnos de monografías y trabajos de investigación, además de satisfacer una inquietud plausible, constituye un recurso docente muy eficaz, sobre todo en un curso donde con seguridad estos trabajos enriquecerán las discusiones previstas.

### III. PROGRAMA ACADÉMICO

A continuación se enuncian las características principales de cada uno de los tres grandes bloques que conforman el programa académico.

#### 1. Curso central introductorio (primer bloque)

Este curso central introductorio tendrá como objetivo una presentación de los principales problemas del desarrollo económico y social de América Latina, haciendo una interpretación integrada de los mismos donde se adviertan sus vinculaciones y sus mutuos condicionamientos.

Abarcará una introducción donde se destacarán los efectos de la insuficiencia dinámica de los sistemas económicos de los países latinoamericanos en lo referente a la estratificación social y a la distribución del ingreso. Se puntualizará la necesidad de una adecuada interpretación de la realidad regional, en lo que concierne a los problemas del desarrollo económico, sociopolítico y cultural, poniendo en evidencia los juicios de valor que esto implica.

En una segunda parte se examinarán los variados aspectos de las relaciones entre centro y periferia, entre los cuales cabe mencionar: la evolución de los conceptos de dichas relaciones, las contradicciones que plantea el proceso de propagación de la tecnología, la desintegración de la periferia frente a la evolución del comercio internacional, los efectos de las fluctuaciones en la relación de los términos de intercambio, las modalidades de la cooperación financiera internacional, etc., para abordar finalmente un análisis de la dependencia de los países periféricos.

Dentro de este contexto se pasará a estudiar el funcionamiento de los sistemas económicos de los países latinoamericanos, destacando los factores que afectan el crecimiento económico, los cambios en la estructura del empleo, los ele

mentos que influyen sobre la distribución del ingreso, los principales problemas del desarrollo agrícola, las características y efectos de los procesos de industrialización. Se examinará, por último, el papel de las fuerzas del mercado y de la intervención estatal.

La cuarta parte de este curso central abordará los aspectos más generales de una estrategia de desarrollo, revisando en primer lugar sus elementos conceptuales, para discutir luego las políticas económicas y sociales en materia de reforma de estructura, movilización social, educación, acumulación de capital, etc. También se analizará la función que en las estrategias de desarrollo tienen la integración económica, el comercio exterior con los países del centro, las transferencias financieras y la absorción de tecnologías, para insertar finalmente los procesos de planificación en el diseño de estrategias.

La última parte se refiere a la política y el desarrollo. En este ámbito se examinará la compatibilidad de los objetivos del desarrollo y la imagen de la sociedad futura; asimismo se expondrán los aspectos políticos que implica la necesidad de incrementar la acumulación de capital y mejorar la eficiencia de la gestión económica, y finalmente se discutirán aspectos de los procesos de desarrollo relacionados con la estructura y modalidades del poder político.

## 2. Interpretación de la realidad latinoamericana y sus perspectivas (segundo bloque)

### A. Aspectos económicos

El conjunto de temas de Desarrollo Económico estará integrado por tres partes fundamentales: interpretaciones del desarrollo de América Latina, evolución de las economías latinoamericanas e identificación de los principales problemas económicos de la región. Se trata, como ya se dijo, de complementar y profundizar los temas que abarcan las primeras partes del curso central introductorio.

En este sentido, el contenido de las tres partes ya mencionadas se articulará en torno a los temas que a continuación se esbozan:

a) La primera parte incluirá una revisión detallada de la interpretación contenida en ese curso central, analizando la evolución de los planteamientos de la CEPAL y examinando tanto sus principales aportes teóricos y proposiciones de política económica como su coherencia interna. Además se expondrán enfoques alternativos, surgidos dentro y fuera de la región, examinándolos también críticamente y contrastándolos con la interpretación antes mencionada.

b) Dentro del marco de referencia de las interpretaciones del punto primero, se estima pertinente presentar y discutir una descripción cuantitativa de los aspectos económicos estructurales más característicos de la realidad latinoamericana contemporánea. Esto será encarado por tipos de problemas y mediante el análisis de sectores, para lo cual se cuenta con el abundante material que se ha venido elaborando en el Instituto, en la CEPAL y en otros organismos. Este análisis debe hacerse necesariamente a un nivel más detallado, que incluya el examen de casos específicos reveladores de la gran diversidad de situaciones que presenta la región.

c) La descripción anterior permite identificar ciertos problemas fundamentales - por ejemplo: formas de industrialización, capital extranjero y sus efectos, problemas agrarios, problemas de empleo, etc. - que afectan a los países de la región. Se tratará asimismo de determinar las respuestas y los tipos de políticas ensayadas para encarar dichos problemas.

d) Complementariamente, tanto el enfoque antes anotado como la experiencia recogida en la enseñanza de estos temas, revelan la necesidad de que el contenido descrito en los puntos precedentes sea complementado con el examen de los aspectos teóricos y prácticos de las relaciones económicas internacionales, con el análisis detallado de la evaluación y perspectivas de los principales sectores económicos y sociales, y con un riguroso conocimiento de historia económica que permita enriquecer las interpretaciones y análisis mencionados, a la vez que esclarecer mejor las situaciones contemporáneas.

## B. Aspectos sociales

a) Dentro de este bloque el conjunto de temas relacionados con la Sociología del Desarrollo debe orientarse a proporcionar una formación y una información que permitan a los participantes:

- i) Comprender adecuadamente el origen social de las opciones que se planteen en su actividad;
- ii) Determinar las consecuencias sociales más importantes que en diversos órdenes puedan tener las decisiones adoptadas, así como juzgar su viabilidad en función de la forma originaria en que fueron pensadas o de las deformaciones que pueden padecer;
- iii) Comprender las resistencias y obstáculos sociales que pueden plantearse durante los procesos de ejecución de las decisiones;

iv) Adquirir la aptitud que permita decodificar los supuestos sociales -- explícitos o implícitos -- de la bibliografía económica.

b) Los contenidos de este conjunto de temas se agruparán alrededor de las siguientes cuestiones fundamentales:

- i) Una parte conceptual de carácter introductorio destinada a esclarecer y precisar nociones cuyo manejo es esencial para la comprensión de la perspectiva sociológica, como las de estructura, poder, estratificación, grupos, instituciones, etc.;
- ii) El cambio social; cambio social y desarrollo; cambio social espontáneo, inducido y planificado. Principales teorías sobre el cambio social; las tesis de filiación positivista y sus representantes en el siglo XIX; las tesis de filiación marxista; análisis de las ideas de Marx sobre el cambio social y sus causas; las diversas interpretaciones del pensamiento de Marx y su influencia sobre las tesis relativas al cambio social en el pensamiento posterior; la interpretación weberiana del cambio;
- iii) Las interpretaciones globales del desarrollo de América Latina. Las interpretaciones de filiación weberiana. Las interpretaciones de base estructural-funcionalista. Las interpretaciones basadas sobre la idea de dependencia;
- iv) Los supuestos ideológicos de las interpretaciones sociológicas;
- v) Los agentes del cambio social y la significación que les atribuyen las diversas escuelas interpretativas con respecto al desarrollo, empresarios, organizaciones obreras, partidos políticos, etc.;
- vi) El Estado, la sociedad política y el desarrollo;
- vii) Las tipologías y los indicadores del desarrollo;
- viii) La noción de desarrollo y el problema de la articulación de las variables económicas y sociales. Los factores de estructuración de la imagen que la sociedad tiene de sí misma y de su futuro.

c) Las interpretaciones teóricas serán analizadas con relación a sus supuestos, lo que obliga a distinguir entre los postulados propiamente científicos de que parten y los supuestos ideológicos que las informan, cuando éstos existen; el análisis considerará su coherencia interna y las grandes líneas que trazan con respecto a la función de los agentes. Se examinará, por último, las relaciones entre la interpretación teórica y las posibilidades de validación empírica, tanto en lo que se refiere al tipo de investigaciones que pudieran

confirmarlas o refutarlas como al estado actual de ese proceso. A su vez, el estudio de los agentes del desarrollo deberá relacionarse con las diferentes orientaciones teóricas y con el material empírico reunido, tratando de mostrar sus logros y sus insuficiencias.

d) La discusión de las interpretaciones del desarrollo, de las evidencias empíricas existentes y de las distintas situaciones estructurales en los países requiere que los participantes manejen ciertos conocimientos básicos de historia social de América Latina y perciban el sentido que la perspectiva histórica puede brindar a los más diversos problemas.

No se trata del estudio de la historia por sí misma, sino por ser y hasta dónde es una herramienta indispensable para comprender más cabalmente el proceso de desarrollo de América Latina.

### 3. Planificación y política económica (tercer bloque)

a) La idea predominante en la concepción de este bloque es el análisis y discusión de un conjunto de bases conceptuales comunes tanto a la planificación del desarrollo como a la política económica. La observación sobre los procesos registrados en los países latinoamericanos, tanto en uno como en otro campo, refuerza significativamente la necesidad de una temática común.

Es evidente que, atendiendo a los instrumentos y técnicas, pueden establecerse distinciones nítidas entre ambas materias y que la indispensable enseñanza de estos aspectos también debe hacerse en forma diferenciada. Una parte importante de la temática de este bloque comprenderá los principales instrumentos de la política económica y las técnicas de planificación. Este tratamiento diferenciado se verá enriquecido si se parte de la concepción común antes indicada, la cual facilitará que los planes a mediano plazo contengan elementos instrumentales de la política económica y que los planes operativos a corto plazo, a su vez, excedan las consideraciones puramente instrumentales y contemplen las orientaciones básicas de la planificación a largo y a mediano plazo. La falta de un análisis integrado de la política económica y de la planificación ha llevado, en muchos casos, a una identificación ficticia de "lo monetario" con el corto plazo y de "lo físico" con plazos más prolongados. Por otra parte, la incorporación de los aspectos sociales tanto al análisis y evaluación de los procesos de planificación y política económica como el examen de alternativas que plantean las estrategias, ayudará a profundizar y hacer más realistas los planteamientos sobre dichos procesos.

b) Se estoca a continuación el contenido de este bloque en sus aspectos más significativos:

- i) La primera parte se destinará a reseñar los orígenes y evolución de los procesos de planificación tanto en el área socialista como en el área no socialista; se elegirán para ello los países más representativos y se insistirá especialmente en la experiencia latinoamericana. Este panorama comprenderá, en cada caso, el alcance de la planificación, destacando las tareas asignadas, sus condicionantes históricas, las finalidades esenciales perseguidas y la estructura institucional de los mecanismos de planificación. Se tratará de vincular todo esto a la influencia que han ejercido las distintas corrientes de pensamiento económico en materia de argumentos para justificar que se haya adoptado la planificación y su desenvolvimiento posterior. Así mismo se reseñarán las principales técnicas de planificación utilizadas en esos casos (por ejemplo: balances de materiales, esquemas contables en valor, técnicas estadísticas y econométricas y modelos de planificación);
- ii) Paralelamente se analizarán las principales características de la evolución de los procesos de política económica en los casos considerados en el punto anterior, destacando qué papel jugó la planificación durante las diferentes etapas de dicha evolución;
- iii) Los dos puntos anteriores constituyen un antecedente indispensable para abordar los problemas teóricos de la política económica y de la planificación, problemas teóricos que también serán tratados en forma paralela y complementaria.

- En lo concerniente a política económica comprenderá:

- . Análisis de los diferentes conceptos de política económica.
- . Estudio de los supuestos y desarrollos teóricos que fundamentan las distintas modalidades de política económica.
- . Examen de los comportamientos de los principales agentes de la actividad socioeconómica y su influencia en la adopción de decisiones.
- . Definición y estudio de los diferentes instrumentos de política económica y de sus áreas de influencia.

Análisis, en profundidad, de algunos de los procesos más significativos de política económica en los países latinoamericanos.

- En lo referente a planificación comprenderá:

- Examen de las diferentes concepciones sobre planificación, tanto en lo relativo a sus aspectos formales como a su vinculación con el sistema político, social y administrativo. En este sentido se pondrá especial atención en temas como la asignación de recursos, la participación social y las alternativas vigentes de organización de la unidad de producción.
- Estudio de las diferentes "dimensiones" de la planificación: global, sectorial y regional, por una parte, y la planificación a largo, a mediano y a corto plazo, por la otra.
- Examen de instrumentos de planificación tales como las técnicas para recopilación y análisis de información, los modelos de planificación, las técnicas para la ejecución de planes (modelos de experimentación numérica y simulación, presupuesto por programa, presupuesto económico nacional, etc.) y las técnicas para evaluación y control de planes (muestreo, casos típicos, contraste de hipótesis, etc.).

iv) Atributos de una política económica planificada. En este punto se plantearán los aspectos formales y los sustantivos de una efectiva vinculación entre los procesos de política económica y de planificación, tanto en lo que se refiere a la adopción de decisiones y a la operatividad de las medidas como a las modalidades de trabajo de los equipos técnicos, su conformación institucional y sus relaciones de coordinación dentro del ámbito de la administración pública.

v) Por último se profundizará el análisis de los problemas y de las técnicas de planificación de los principales sectores económicos y sociales, y se discutirá la aplicación de los instrumentos de política económica; para ello, cuando sea pertinente, se recurrirá al estudio de casos. Formarán parte de este bloque, asociado a la temática de planificación, la preinversión y evaluación de proyectos, así como algunas materias de apoyo que permitan desarrollar con rigor la enseñanza sobre instrumentos de planificación.



#### IV. PROGRAMA DE SEMINARIOS DE DISCUSION SOBRE PROBLEMAS DEL DESARROLLO LATINOAMERICANO

El programa de seminarios de discusión de los principales problemas del desarrollo consiste en un planteamiento general de los problemas, un análisis en profundidad de los mismos y una tercera parte destinada a discutir sobre las modalidades y funcionamiento de los mecanismos de planificación.

1. El planteamiento general comprenderá los siguientes aspectos que serán presentados en forma integrada:

a) Con relación al ámbito económico interesará destacar los problemas del crecimiento, las relaciones económicas internacionales, los problemas de empleo, productividad y recursos humanos, la distribución de la riqueza y del ingreso, así como algunos otros tipos de problemas de interés general para la mayoría de los países, como los efectos de las variaciones en los niveles y sistemas de precios. Se estimulará además la crítica y discusión en torno a la estructura agraria, la estructura industrial, el sector externo y el sector público.

b) En lo concerniente al ámbito social se discutirán problemas que pertenecen al campo de la estructura sociopolítica y se relacionan con las características de los procesos de cambio social.

c) De la consideración de los dos puntos anteriores surgirá un diagnóstico general que servirá de base para discutir la evolución y las perspectivas socioeconómicas de América Latina.

Aunque el enunciado de los puntos anteriores induce a pensar que las discusiones se orientarían hacia el estudio de la región como un todo, se tratará de especificar las diferencias según los países para hacer más realistas los planteamientos y aprovechar la experiencia de los participantes.

2. La segunda parte de este programa se dedicará a la profundización del análisis de problemas importantes del desarrollo de América Latina. Aquí será necesario remitirse al estudio de casos concretos, pues el tratamiento de un problema desde el punto de vista regional puede disimular las singularidades muchas veces indispensables para llegar a cabales interpretaciones y esbozar de esta manera alternativas de solución.

El conjunto de temas que se presenta a continuación constituye una relación provisional que permite percibir el contenido que tendrá esta parte del Curso.

a) Funcionamiento y evolución de las economías latinoamericanas. Interesará destacar la estructura de la producción y las formas de concentración de la propiedad de las unidades productivas, para examinar sus efectos sobre la distribución

del ingreso, la ocupación, la absorción de tecnologías, las variaciones de los precios y, en general, sobre las relaciones con el exterior y el potencial de crecimiento de la economía.

b) Relaciones económicas y financieras internacionales. Aquí se estudiará la influencia sobre el desarrollo latinoamericano que tienen las tendencias de las economías del "centro" y las del comercio "centro-periferia"; el comportamiento del capital extranjero y su tratamiento, y en general, el financiamiento externo; las nuevas formas de actividad de las empresas multinacionales y los problemas de liquidez internacional.

c) Principales problemas sociales de América Latina. Se destacarán los que influyen más directamente sobre la evolución económica de la región y la formulación de políticas de desarrollo.

d) Políticas de desarrollo. Se procurará plantear este tema en dos niveles: uno, general, analizará las modalidades vigentes en América Latina en cuanto a esquemas políticos y opciones reales de desarrollo; otro examinará políticas económicas y sociales más específicas, tales como las políticas sectoriales (agricultura, industria, etc.), la política laboral y de empleo, las políticas de sectores sociales (educación, salud, etc.), la política de población, etc.

e) Estudios de problemas específicos. Hay el propósito de abordar el análisis de algunos problemas concretos - tales como tecnología, inflación, empleo, etc. - que hayan sido objeto de investigación por el Instituto.

3. La tercera parte de este programa está destinada a discutir las modalidades y el funcionamiento de los mecanismos y procesos de planificación, así como sus vinculaciones con los centros de decisión y los organismos de ejecución. En este sentido se ha previsto que los participantes intervengan en un Seminario de Planificación que el Instituto está organizando. También se tratará de reflexionar sobre las formas que en el futuro podrían adquirir estos procesos tanto en sus aspectos institucionales como metodológicos.

## V. ASPECTOS DOCENTES Y REQUISITOS DE LOS PARTICIPANTES

1. Como ya se indicó, el diálogo permanente, el estrecho contacto entre profesores y participantes y las discusiones en seminarios, constituirán el recurso didáctico preferido. Se pretende reducir el número de clases expositivas e intensificar las lecturas dirigidas, para cumplir los requisitos del programa académico. Asimismo se vigorizará la labor de tutoría para la realización de investigaciones.

2. El planteamiento general ya expuesto en la sección II y las consideraciones recién enunciadas requieren que el número de

participantes sea reducido, estimándose que no debe exceder de quince. Esto a su vez implica que no se podrá mantener un equilibrio anual en la distribución geográfica de los seleccionados. Si se considera la duración total de la tercera fase del Instituto, podrían atenderse las demandas de todos los países. Más aún, tampoco debe descartarse que después de esta primera experiencia sea posible reclutar en otros años un número ligeramente mayor de participantes.

3. Para llevar a cabo esta actividad con las características enunciadas es indispensable que los participantes posean un elevado nivel de conocimientos sobre estas disciplinas, que hayan acumulado cierta experiencia vinculada directamente a los problemas que abarcará el Curso y que reúnan condiciones personales que faciliten el diálogo y el trabajo en equipo. La preselección no se circunscribirá a las oficinas de planificación, sino que abarcará también la administración pública en general y los centros universitarios.

4. Con el Programa de Capacitación, a cuyo cargo está el Curso, colaborarán en forma intensa los funcionarios de otras divisiones del Instituto y de la CEPAL, y se contempla además la colaboración de profesores de otros organismos nacionales e internacionales.

## VI. ASPECTOS FORMALES

### 1. Trámites de admisión

La admisión al Curso de Desarrollo y Planificación requiere dos trámites administrativos distintos, que competen a organismos diferentes.

El primero de esos trámites tiene por objeto obtener la aprobación de la solicitud de admisión al Curso por parte del Comité de Selección del Instituto. Para cumplir este requisito será necesario solicitar de la oficina del Representante Residente de las Naciones Unidas el formulario TAO-1(2-59) SP \*/ y proporcionar en detalle las informaciones que en él se solicitan. Este formulario, en triplicado, deberá ser firmado por la autoridad competente del Gobierno solicitante y presentado al Representante Residente, quien lo tramitará ante el Instituto.

El formulario consta de cinco partes:

La parte I está destinada a la presentación oficial del postulante por parte del Gobierno.

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\* Estos formularios son utilizados por las Naciones Unidas para solicitar becas, pero el Instituto los emplea para que el postulante solicite su inscripción en el Curso.

La parte II será llenada por el Representante Residente del Programa de las Naciones Unidas para el Desarrollo acreditado en el país del candidato.

La parte III, con la historia profesional del candidato y los programas de estudio cursados, deberá ser contestada por el postulante.

A la pregunta 17 (página 5) se debe responder: "Programa de Capacitación del Instituto Latinoamericano de Planificación Económica y Social, Curso de Desarrollo y Planificación".

Los candidatos deberán presentar asimismo los siguientes documentos:

- i) Enumeración completa y detallada de todas las asignaturas comprendidas dentro de la formación universitaria del postulante (se consideran insuficientes las referencias breves a programas o planes de estudio normales);
- ii) Certificado de calificaciones obtenidas en la Universidad;
- iii) Certificado de graduación.

La parte IV debe ser contestada por una autoridad nacional que tenga a su cargo la selección de becarios al exterior o, cuando no exista una entidad que desempeñe esas funciones, por un alto jefe del organismo donde trabaja el postulante.

El examen médico al que se refiere la parte V es requisito indispensable que deben cumplir todos los candidatos.

El segundo trámite se refiere a la obtención de becas para los postulantes aceptados por el Comité de Selección. Como se desea tener la seguridad de que el postulante seleccionado está en condiciones físicas y mentales para seguir un intenso ritmo de trabajo, será preciso enviar al Instituto una radiografía del tórax y exámenes completos de laboratorio. Los gastos que ello ocasione correrán por cuenta del participante.

El Instituto no otorga becas en forma directa porque no dispone de fondos para hacerlo. Por lo tanto, los candidatos seleccionados para participar en el Curso de Desarrollo y Planificación obtendrán el financiamiento de sus estudios mediante los mecanismos de becas que tienen la Oficina de Cooperación Técnica (OTC) de las Naciones Unidas y otros organismos internacionales. Los candidatos que no obtengan alguna de las becas mencionadas y hayan sido aceptadas por el Comité de Selección del Instituto deberán obtener financiamiento de los gobiernos que los presenten u optar, en forma personal, a las que conceden fundaciones estatales o privadas. Por cualquiera de estos medios deberán acreditar ante la Dirección del Curso

la existencia de un financiamiento adecuado que les permita dedicarse a tiempo completo a las exigencias del Curso.

## 2. Selección

Las solicitudes de inscripción se recibirán hasta el 15 de abril de 1971, fecha en que el Comité de Selección del Instituto iniciará su estudio y evaluación. Con posterioridad funcionarios del Instituto visitarán los distintos países con objeto de entrevistar a los candidatos seleccionados.

## 3. Iniciación, duración y lugar

El Curso de Desarrollo y Planificación se iniciará el 1° de junio y tendrá una duración de siete meses.

El Curso se realizará en la sede del Instituto Latinoamericano de Planificación Económica y Social, Edificio Naciones Unidas, Av. Dag Hammarskjöld, Santiago de Chile.

## 4. Normas de funcionamiento

Las normas de funcionamiento persiguen el propósito de obtener un eficiente desarrollo de las actividades del Curso. Por ello deberán observarse rigurosamente todos los alumnos.

Los participantes están obligados a dedicarse por entero y con exclusividad a las labores del Curso. De ahí que no puedan intervenir en actividades comerciales, políticas o de cualquier otra naturaleza. La Dirección del Curso se reserva el derecho de suspender definitivamente a los participantes que no cumplan estas normas y a quienes no alcancen un mínimo de aprovechamiento y comportamiento.

a) Horario de clases: El horario de clases, controles, seminarios y conferencias será preparado por la Dirección del Curso y comunicado con la debida antelación.

b) Asistencia: Es obligatoria la asistencia a clases, seminarios, conferencias y otras actividades del Curso.

Para obtener un certificado de asistencia se exigirá un mínimo de 90 por ciento de concurrencia a clases, seminarios, etc. Tres atrasos se considerarán como una inasistencia.

c) Exámenes y calificaciones: Todos los participantes deberán rendir los exámenes y efectuar las pruebas de control de lecturas y aprovechamiento que establezca la Dirección.

El aprovechamiento alcanzado por los participantes en las diferentes materias será evaluado mediante controles de conocimiento y lectura, exámenes escritos y orales, así como mediante trabajos sobre temas que serán desarrollados individualmente o en grupos, según establezca la Dirección en cada caso.

Los exámenes, pruebas de suficiencia, trabajos, monografías, participación en seminarios, etc. serán calificados de acuerdo con la siguiente escala: A - Distinguido; B - Bueno; C - Aprobado; D - Reprobado.

d) Aprobación del Curso: Para aprobar el Curso será necesario que el participante obtenga como mínimo la nota C (aprobado) en cada una de las materias. Además de los resultados parciales de los exámenes, para la aprobación del Curso se tomará en cuenta el grado de asimilación del material de lectura, la calidad de los trabajos prácticos, la participación en las discusiones y el cumplimiento de las horas de trabajo.

Las calificaciones serán confidenciales y comunicadas individualmente al participante.

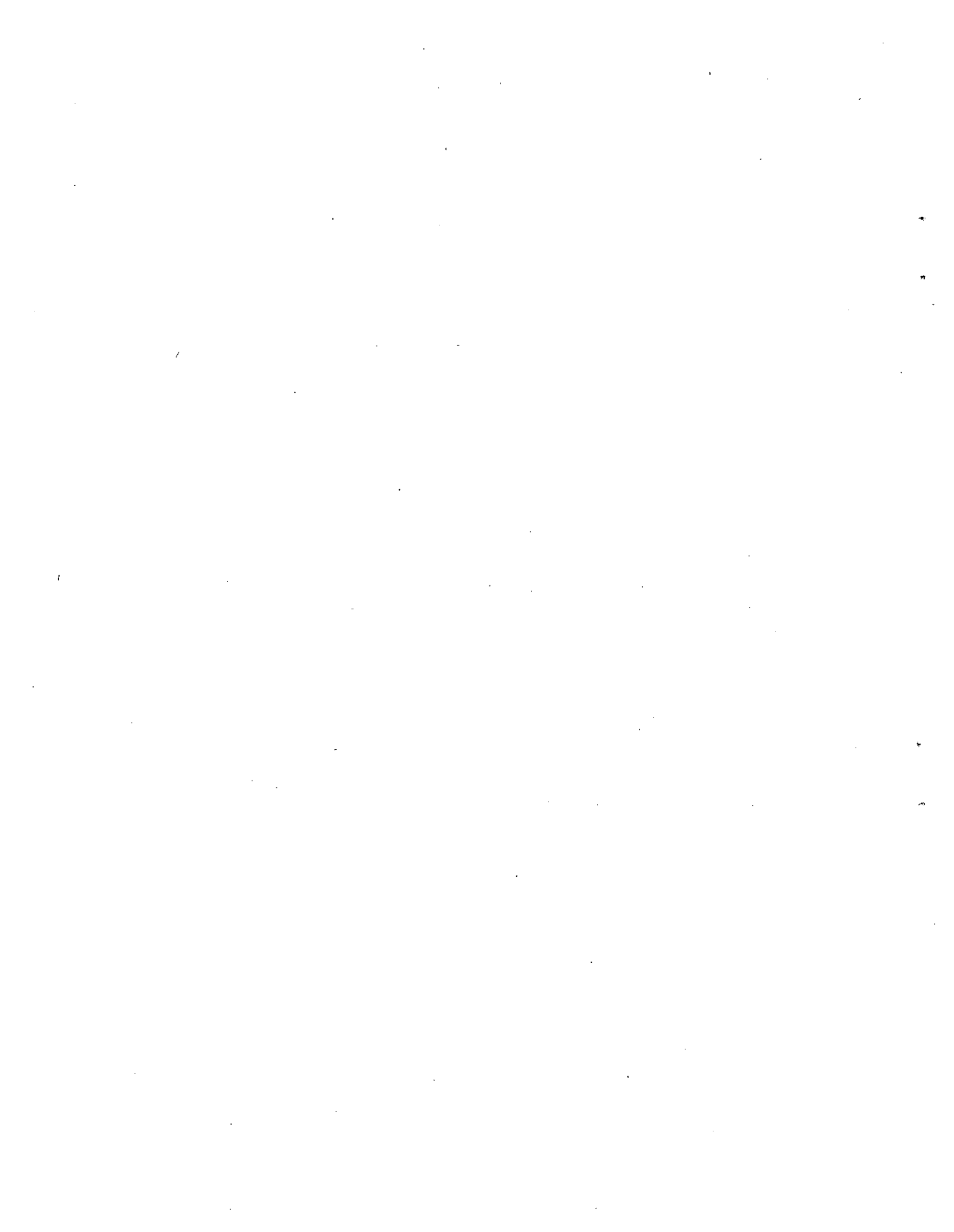
Los participantes que hayan cumplido con todos los requisitos aquí establecidos obtendrán el certificado correspondiente, donde quedará constancia de ello. Los participantes que no hayan cumplido con el requisito de aprobación, pero sí con el de asistencia, recibirán un certificado en el que conste este hecho.



Annex 6

LIST OF ADVISORY ASSISTANCE MISSIONS UNDERTAKEN BY THE  
INSTITUTE FROM 1962 TO THE PRESENT TIME





LIST OF ADVISORY ASSISTANCE MISSIONS UNDERTAKEN BY THE INSTITUTE  
FROM 1962 TO THE PRESENT TIME\*

<u>1962</u>	<u>1963</u>	<u>1964</u>
<u>Advisory Groups</u>		
<u>Country</u>	<u>Field of co-operation</u>	
(1) Uruguay	Economic diagnosis Formulation of a three-year plan	
(2) Peru	Public investment plan 1964-1965	
(3) Bolivia	Two-year investment plan Long-term plan	
(4) Paraguay	Introduction of performance budget system Diagnosis of the various sectors of the economy Two-year development plan 1965-1966	
(5) Central America	Organization and putting into operation of planning offices in each of the five countries of the area Economic diagnosis and formulation of public investment plans for each of the Central American countries	
(6) Ecuador	Introduction of performance budget system	
<u>1965</u>		
(1) Bolivia	Two-year development plan Administrative and financial reforms Research on natural resources	
(2) Paraguay	Revision and completion of the Two-Year Development Plan and preparation for its implementation Research on natural resources	
(3) Chile	Economic and social planning	
(4) Dominican Republic	Formulation of a provisional diagnosis and an over-all development strategy	
(5) Peru	Formulation of a performance budget system for 1966 Formulation of Economic and Social Development Plan 1967-1970	
(6) Uruguay	National Development Plan	
(7) Central America	Introduction of regional performance budget system and establishment of common bases for the formulation of national budgets	
(2) Argentina	Methodological aspects of presentation of performance budget	

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\* For further details on the missions listed here, see the report of  
the Director-General to the Governing Council of the Institute.

<u>Country</u>	<u>Field of co-operation</u>
(9) Panama	Preparation of preliminary draft of a budget law
(10) Ecuador	Preparation of agricultural projects for the coastal belt

1966

(1) Colombia	Planning
(2) Central America	Annual operational plans Development strategy
(3) Dominican Republic	Development strategy Budget formulation
(4) Chile	Agricultural programming
(5) Peru	National accounts
(6) Brazil	Budget techniques
(7) Panama	Budget techniques
(8) Paraguay	First steps in formulation of a development strategy
(9) Argentina	Operational plans
(10) Uruguay	Operational plans
(11) Venezuela	Operational plans

1967

(1) Central America	Completion of development strategy Budget techniques
(2) Paraguay	Completion of development strategy
(3) Venezuela	Development strategy for the Andean area and its zone of influence
(4) Chile	Development strategy for the regions of northern Chile known as the Norte Grande and Norte Chico Budget techniques (extension of application of the performance budget to the Central Government)
(5) Dominican Republic	Three-year public investment plan and revision of development strategy Formulation of public sector budget for 1968 Advisory assistance to the Dominican Corporation of State Enterprises (CORDE) in completion of plan for rehabilitating State enterprises
(6) Brazil	Analysis of Master Plan prepared by the Superintendencia de Desenvolvimento do Nordeste (SUDENE)
(7) Uruguay	Performance budget techniques Preparation of Annual Plan for 1968

1968

- (1) Venezuela Development strategy in the framework of subregional integration
- (2) Peru Development strategy in the framework of subregional integration  
Annual operational plans  
Advisory assistance to the National Office for the Rationalization of the Public Administration (ONRAP) in administrative reforms
- (3) Chile Formulation of agricultural development plan
- (4) Brazil Advisory assistance to the State of Minas Gerais and the State of São Paulo in programme and performance budgeting
- (5) Uruguay Performance budget system  
National accounts
- (6) Mexico Advisory assistance to the Universidad Autónoma de México in connexion with introduction of performance budget system
- (7) Chile Budget techniques
- (8) Dakar Budget techniques
- (9) Tanzania Budget techniques

1969

- (1) Brazil Development strategy for the State of Minas Gerais  
Establishment of performance budget system  
National accounts
- (2) Ecuador Development strategy in the framework of subregional integration
- (3) Peru Formulation of a technical assistance programme
- (4) Honduras Operational plans
- (5) Chile Advisory services to CORFO in connexion with introduction of performance budget system

1970

- (1) Brazil Development strategy for the State of Minas Gerais  
Performance budget system  
Planning: exploratory mission to São Paulo
- (2) Bolivia Development strategy
- (3) Andean Group Studies and analyses for formulation of development strategy
- (4) Argentina Advisory services to the province of Córdoba in connexion with operational plans
- (5) Guatemala Operational plans
- (6) Chile Advisory services to CORFO in connexion with performance budget system

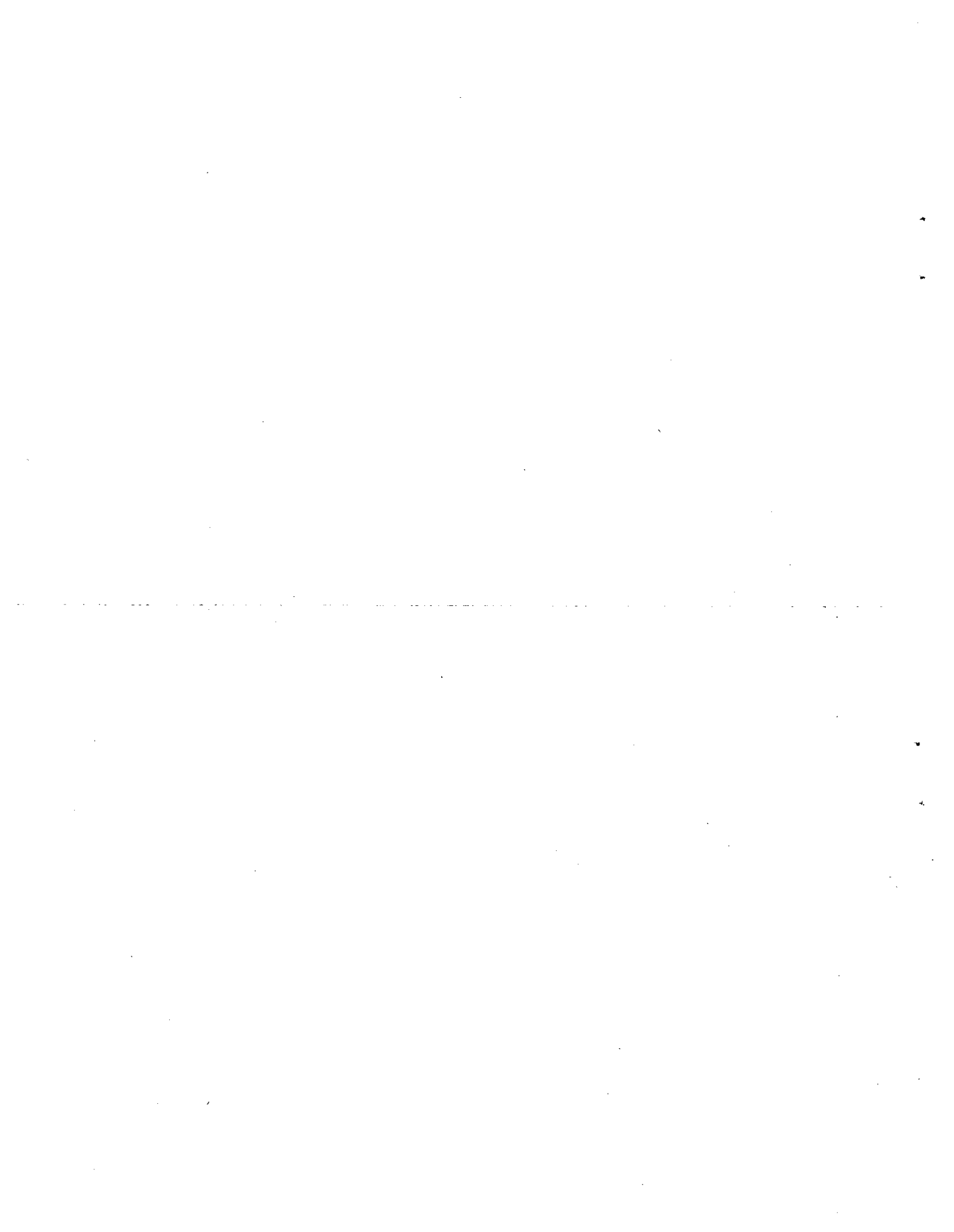
/1971

1971

- (1) Brazil Completion of advisory services to the State of Minas Gerais in connexion with strategy and operational plans
- (2) Argentina Continuation of advisory services to the province of Córdoba in connexion with operational plans
- (3) Chile Advisory services to CDEPLAN in connexion with operational plans and to CORFO in relation to performance budget system
- (4) Guatemala Operational plans
- (5) El Salvador and Costa Rica Planning: exploratory mission
- (6) Andean Group Continuation of advisory services in connexion with strategy

ANNEX 7

PROJECT MISSIONS UNDERTAKEN BY THE INSTITUTE FROM 1963 TO 1970



PROJECT MISSIONS UNDERTAKEN BY THE INSTITUTE FROM 1963 TO 1970\*

- 1963            Paraguay. Collaboration with the planning office of Paraguay in an over-all compilation of investment proposals, as part of planning operations.
- 1965            Uruguay. Advisory services to the Commission on Investment and Economic Development (CIDE) - Uruguay's planning agency - in connexion with the identification and presentation of basic projects under the investment plan. The study carried out was issued in a separate volume as part of Uruguay's first Development Plan.
- 1965-66        Uruguay. Advisory assistance to CIDE in the analysis of the machinery for generation, decision-making and action in respect of projects, as a basis for setting in motion a mechanism for project programming and promotion whereby the public sector's activities in this field can be oriented and co-ordinated, in line with the Development Plan.
- 1965-66        Ecuador. Joint mission with IDB for the preparation of a project relating to agricultural diversification and reconstruction of marginal banana-growing areas in the central part of the coastal belt.
- 1966-67        Paraguay. Joint mission with IDB and FAO to prepare an integrated development project for the Eje Este de Colonización (eastern land settlement nucleus).
- 1967            Argentina. Advisory assistance to an inter-Ministerial commission dependent on the Ministry of Economic Affairs in connexion with the possibility of undertaking integrated development projects for rural areas as a means of contributing to diversification of production and to development in the province of Tucuman.

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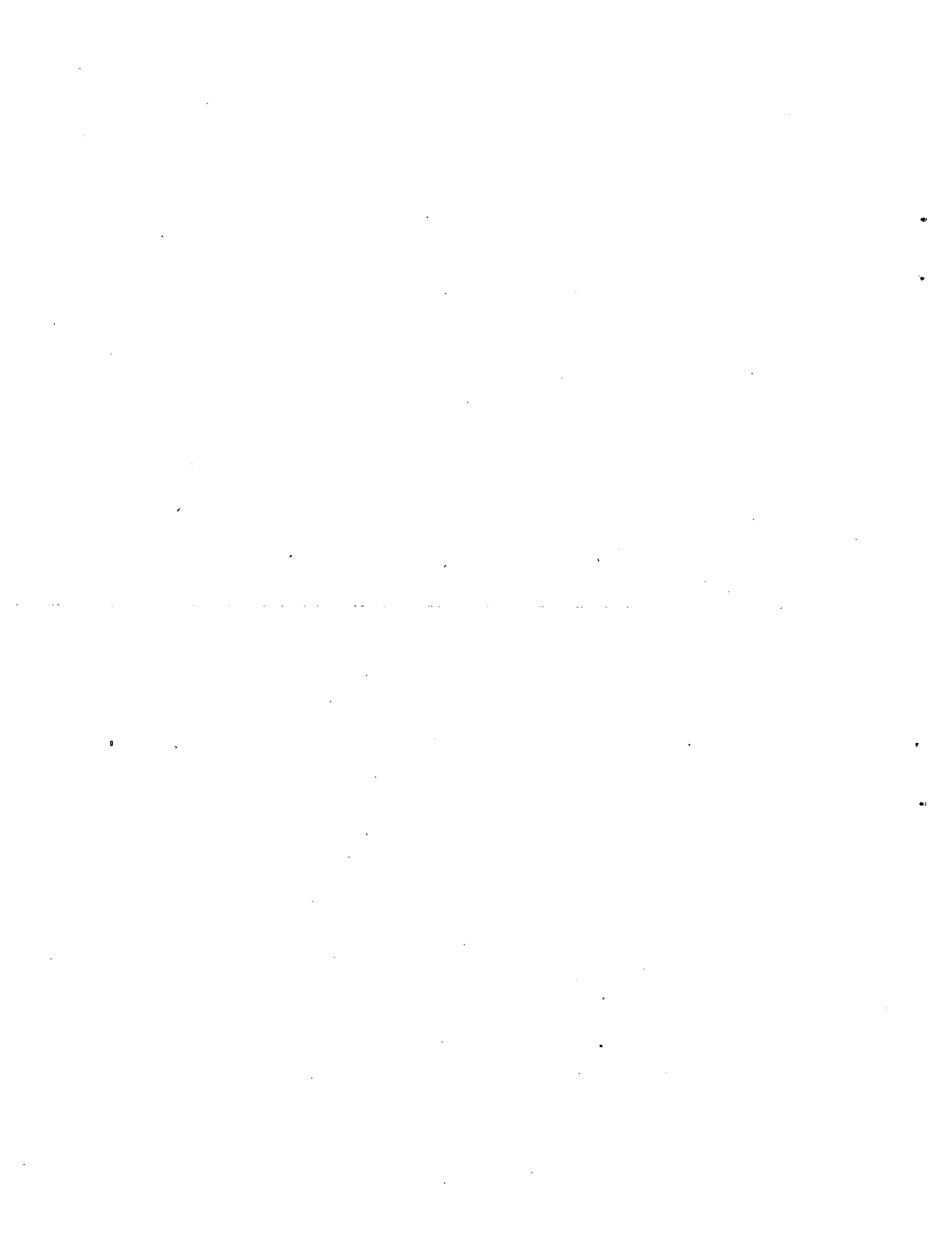
\* The space devoted to this brief description of the missions carried out bears, of course, no proportion whatever to the amount of time and effort they took up. For the relevant details see the reports to the Governing Council.



- 1967 Brazil. Joint mission with IDB and other international agencies to lay down the bases of a programme for the integrated development of the Reconcavo Bahiano, including identification of the projects of greatest importance for that purpose.
- 1968 Central America. Joint mission with IDB to advise Central American Governments and integration agencies on the identification of projects of multinational interest in frontier zones, in particular the Gulf of Honduras, the Gulf of Fonseca and the San Juan river basin.
- 1968 Central America. Advisory services to SIECA in connexion with machinery for the identification and promotion of multinational investment projects as a means of giving dynamic impetus to the Central American Common Market.
- 1968-71 Venezuela. Advisory assistance to the Andes Development Corporation (CORPOANDES) in the preparation and execution of a project for the integrated development of the high western plain (Alto Llano Occidental) in the Andean area.
- 1969 Honduras. Advisory assistance to the Government in connexion with the establishment of machinery for the programming and promotion of development projects in the framework of national planning processes.
- 1969 Bolivia. Advisory services to the Ministry of Planning in relation to the establishment of criteria for the selection of development projects calculated to broaden the objectives of the Plan.
- 1970-71 Venezuela. Advisory assistance to CORPOANDES in the preparation of the bases for an integrated development project relating to the Motatan-Cenizo area in the Andean region.
- 1970 Peru. Advisory assistance to the National Planning Institute in connexion with the establishment of a national pre-investment system.
- 1970 Peru. Advisory services to the Reconstruction and Rehabilitation Committee concerned with the area affected by the May 1970 earthquake, in connexion with the programming of projects linked to the relevant activities. This work is being continued through a United Nations technical assistance project under the guidance of the Institute.

ANNEX 8

LIST OF PRINTED PUBLICATIONS AND MIMEOGRAPHED DOCUMENTS ISSUED  
BY THE INSTITUTE DURING PHASE I AND PHASE II



LIST OF PRINTED PUBLICATIONS AND MIMEOGRAPHED DOCUMENTS ISSUED BY THE  
INSTITUTE DURING PHASE I AND PHASE II \*

I. PRINTED PUBLICATIONS

A. Textos of the Latin American Institute for Economic and Social  
Planning \*\*

"Discusiones sobre planificación", 152 pp.

1st. edition, Mexico 1966 - 6,000 copies

2nd. edition, Mexico 1968 - 3,000 copies

"Planificación del Desarrollo Industrial", Héctor Soza Valderrama,  
380 pp.

1st. edition, Mexico 1966 - 6,000 copies

"Filosofía, educación y desarrollo", José Medina Echavarría, 336 pp.

1st. edition, Mexico 1967 - 6,000 copies

2nd. edition, Mexico 1970 - 3,000 copies

"Planificación y presupuesto por programas", Gonzalo Martner,  
532 pp.

1st. edition, Mexico 1967 - 6,000 copies

2nd. edition, Mexico 1970 - 2,000 copies

"La brecha comercial y la integración latinoamericana", 302 pp.

1st. edition, Mexico 1967 - 5,000 copies.

"El subdesarrollo latinoamericano y la teoría del desarrollo",  
Oswaldo Sunkel and Pedro Paz, 406 pp.

1st. edition, Mexico 1970 - 5,000 copies

"Dos polémicas sobre el desarrollo de América Latina", 238 pp.

1st. edition, Santiago, Chile 1970 - 4,000 copies

"El sector público en la planificación del desarrollo", Ricardo  
Cibotti and Enrique Sierra, 280 pp.

1st. edition, Mexico 1970 - 5,000 copies

"Los recursos naturales en el desarrollo económico", Orris G.  
Herfindahl, 298 pp.

1st. edition, Santiago, Chile 1971 - 4,000 copies

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\* Some of the documents shown as mimeographed (or in ditto) are for  
internal circulation only, not for general distribution.

\*\* Published in association and under an agreement with the Institute,  
by the Editorial Siglo XXI (Mexico) and the Editorial Universitaria  
(Santiago, Chile).

In the press

"Estadística básica para planificación", Arturo Nuñez del Prado

"Estudios sobre la juventud marginal latinoamericana", Adolfo Gurrieri, Edelberto Torres Rivas and others

In course of preparation

"El planeamiento de la educación", Simón Romero Lozano and Sebastián Ferrer.

"Discusiones sobre programación monetario-financiera".

"Contabilidad social", Manuel Balboa.

"Planificación operativa anual".

B. Cuadernos of the Latin American Institute for Economic and Social Planning \*

Series I. Apuntes de Clase (Class Notes)

- Nº 1 - "Teoría y programación del desarrollo económico", Jorge Ahumada, 96 pp.  
1st. edition, 1967 - 3,000 copies  
2nd. edition, 1970 - 3,000 copies
- Nº 2 - "Asignación de recursos, programación lineal y teoría económica", José Ibarra, 52 pp.  
1st. edition, 1967 - 3,000 copies  
2nd. edition, 1970 - 3,000 copies
- Nº 3 - "Cinco modelos de crecimiento económico", Pedro Paz and Octavio Rodríguez, 104 pp.  
1st. edition, 1968 - 3,000 copies  
2nd. edition, 1970 - 3,000 copies
- Nº 4 - "Control de la ejecución de proyectos por el método del camino crítico (PERT)", Antonio Baltar, 56 pp.  
1st. edition, 1968 - 3,000 copies  
2nd. edition, 1971 - 3,000 copies (in the press)
- Nº 5 - "Estadística básica para planificación", vols. 1 and 2, Arturo Nuñez del Prado, 200 pp.  
1st. edition, 1969 - 3,000 copies  
2nd. edition, 1971 - 1,000 copies

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\* Printed internally by the offset method in the ECLA/INSTITUTE Documents Reproduction Unit (Santiago, Chile). The number of pages corresponds, where the case arises, to the second edition.

Series II. Anticipos de Investigación (Preliminary Research Findings)

- Nº 1 - "El marco histórico del proceso de desarrollo y de subdesarrollo",  
Osvaldo Sunkel, 40 pp.  
1st. edition, 1967 - 3,000 copies  
2nd. edition, 1968 - 3,000 copies  
3rd. edition, 1970 - 3,000 copies
- Nº 2 - "Consideraciones sobre la estrategia de industrialización  
de América Latina", 50 pp.  
1st. edition, 1967 - 3,000 copies  
2nd. edition, 1970 - 3,000 copies
- Nº 3 - "La infraestructura en la planificación del desarrollo",  
Ricardo Cibotti, 64 pp.  
1st. edition, 1968 - 3,000 copies  
2nd. edition, 1971 - 3,000 copies
- Nº 4 - "Metodología de evaluación de los recursos naturales",  
Estevam Strauss, 84 pp.  
1st. edition, 1969 - 3,000 copies
- Nº 5 - "Análisis de proyectos de integración", Benjamín Hopenhayn  
and Héctor Fernández, 52 pp.  
1st. edition, 1968 - 3,000 copies
- Nº 6 - "La programación monetario-financiera y su relación con el  
desarrollo económico", 56 pp.  
1st. edition, 1968 - 3,000 copies
- Nº 7 - "El planeamiento de la educación", Simón Romero Lozano and  
Sebastián Ferrer, 148 pp.  
1st. edition, 1969 - 3,000 copies
- Nº 8 - "Consideraciones sobre ocupación industrial", 80 pp.  
1st. edition, 1969 - 3,000 copies
- Nº 9 - "Los recursos humanos en el desarrollo de América Latina",  
Esteban Lederman, 84 pp.  
1st. edition, 1969 - 3,000 copies  
2nd. edition, 1971 - 3,000 copies
- Nº 10 - "Los recursos hidráulicos de Chile, Nathaniel Wollman, 128 pp.  
1st. edition, 1969 - 3,000 copies
- Nº 11 - "Notas sobre integración, bienestar y evaluación de  
proyectos", Louis Lefeber, 36 pp.  
1st. edition, 1969 - 3,000 copies  
  
"Notes on Integration, Welfare and Project Evaluation",  
Louis Lefeber, 32 pp.  
1st. edition, 1970 - 3,000 copies
- Nº 12 - "Notas sobre formulación de proyectos", 196 pp.  
1st. edition, 1970 - 3,000 copies

/Series III.

Series III. Manuales Operativos (Practical Handbooks)

- Nº 1 - "Manual de medición de costos por programas", 100 pp.  
1st. edition, 1967 - 3,000 copies  
2nd. edition, 1971 - 3,000 copies
- Nº 2 - "La planificación de la encuesta industrial", Retórico  
Fretes Garay, 92 pp.  
1st. edition, 1971 - 3,000 copies

In course of preparation

"Dos ensayos sobre educación y empleo en América Latina",  
Aldo Solari.

"El sindicalismo chileno", Adolfo Gurrieri and Francisco Zapata.

II. MIMEOGRAPHED DOCUMENTS

A. Official documents \*

- INST/1 G Resolutions  
INST/2 G Plan of operation  
INST/3 G Latin American Institute for Economic and Social Planning  
Programme of work 1962-63  
INST/4 G Rules of Procedure of the Governing Council  
INST/15 G Report of the Director General of the Institute to the  
Governing Council  
INST/16 G Curso de Capacitación en Planificación de la Salud  
1962, Informe Final de los Codirectores  
INST/17 G Curso de Capacitación en Planificación de la Educación,  
1962, Informe Final de los Codirectores  
INST/20.  
Rev.1 L Agreement on Co-operation between the Latin American  
Institute for Economic and Social Planning and UNESCO  
INST/24 L Report of the Director-General of the Institute to the  
Governing Council  
INST/25 L Work programme for 1964.  
INST/27 L Segundo Curso de Capacitación en Planificación de la  
Salud, 1963. Informe Final de los Codirectores

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\* L = Limited distribution; G = General distribution.

The gaps observable in the numbering are due to the elimination of  
internal documents, agenda for meetings, summary records, prospectuses  
of courses, etc., which would make this list longer still.

- INST/29 L Agreement on co-operation between the Institute and Resources for the Future, Inc.
- INST/31  
Rev.2 G Work programme for 1965
- INST/33 L Report of the Director-General of the Institute to the Governing Council
- INST/35 L Tercer curso de capacitación en planificación de la salud, 1964. Informe Final de los Codirectores.
- INST/38 L Informe sobre las actividades del Instituto en el primer trimestre de 1965
- INST/41 G Report of the Director-General of the Institute to the Governing Council  
Rev.1
- INST/42 G Work programme for 1966  
Rev.1
- INST/43 G Colaboración con la Escuela de Economía y Administración de la Universidad de Concepción
- INST/49 G Evolución y orientaciones del Instituto
- INST/51 L Informe sobre las actividades del Instituto de enero a abril de 1966.
- INST/53 L Report of the Director-General to the Governing Council
- INST/54 L Latin American Institute for Economic and Social Planning: Programme of work and programme and performance budget for 1967
- INST/57 Las reformas presupuestarias para la planificación de América Latina
- INST/62 L Training Programme of the Latin American Institute for Economic and Social Planning.
- INST/L.2\* Report of the Director-General to the Governing Council
- INST/L.3 Report of the Director-General of the Latin American Institute for Economic and Social Planning on the Institute's programme of work for 1968
- INST/L.4 Latin American Institute for Economic and Social Planning: Performance budget for 1968
- INST/L.6 El planeamiento de la educación: aspectos conceptuales y metodológicos, Simón Romero Lozano, D. Carelli, F. Escondrillas y S. Ferrer
- INST/L.8 Report of the Director-General to the Governing Council
- INST/L.9 Reflexiones en torno a los problemas actuales de la planificación en América Latina
- INST/L.11 Report of the Director-General to the Governing Council
- INST/L.12 Note by the Director-General on the status of government contributions to the Second Phase of the Institute's activities
- INST/L.13 Latin American Institute for Economic and Social Planning: Programme of work and performance budget for 1969
- INST/L.17 Bases for the reorientation of the Training Programme  
Report on the activities of the Institute in 1969

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\* In 1968 a change was introduced in the serial numbers of official documents.



- INST/L.17 Report on the activities of the Institute in 1969.  
Add.1 Administration and finance
- INST/L.18 Proposals submitted by the Director-General to the  
Governing Council respecting the future activities  
and financing of the Institute
- INST/L.19 Latin American Institute for Economic and Social Planning:  
Programme of work and performance budget for 1970
- INST/L.21 Report on the activities of the Institute in 1970
- INST/L.22 Programa de trabajo y presupuesto por programas del  
Instituto para 1971

B. Documentation for seminars

Seminar on short-term monetary and financial programming

Santiago, Chile, 28 November to 1 December 1967

- INST/S.1/L.1 Algunas consideraciones sobre la programación monetario-  
financiera de corto plazo - ILPES
- INST/S.1/L.1 Observaciones sobre el uso de funciones y modelos  
Add.1
- INST/S.1/L.2 La asistencia financiera externa como instrumento  
de programación - Experiencia reciente de Guatemala,  
Gert Rosenthal
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- Add.6 La exportación de manufacturas
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ANNEX 9

SALES OF INSTITUTE TEXTOS AND CUADERNOS BETWEEN  
1 JANUARY 1967 AND 15 MAY 1971

Annex 9

SALES OF INSTITUTE TEXTOS AND CUADERNOS BETWEEN  
1 JANUARY 1967 AND 15 MAY 1971 \*

<u>Year</u>	<u>Escudos</u>	<u>Dollars</u>
1967	5.836.46	867.34
1968	29.437.32	4.303.23
1969	45.537.24	7.219.30
1970	113.770.47	9.878.81
1971 **	<u>35.360.53</u>	<u>2.829.61</u>
<u>Total</u> Escudos	229.942.02 ***	Dollars 25.098.29

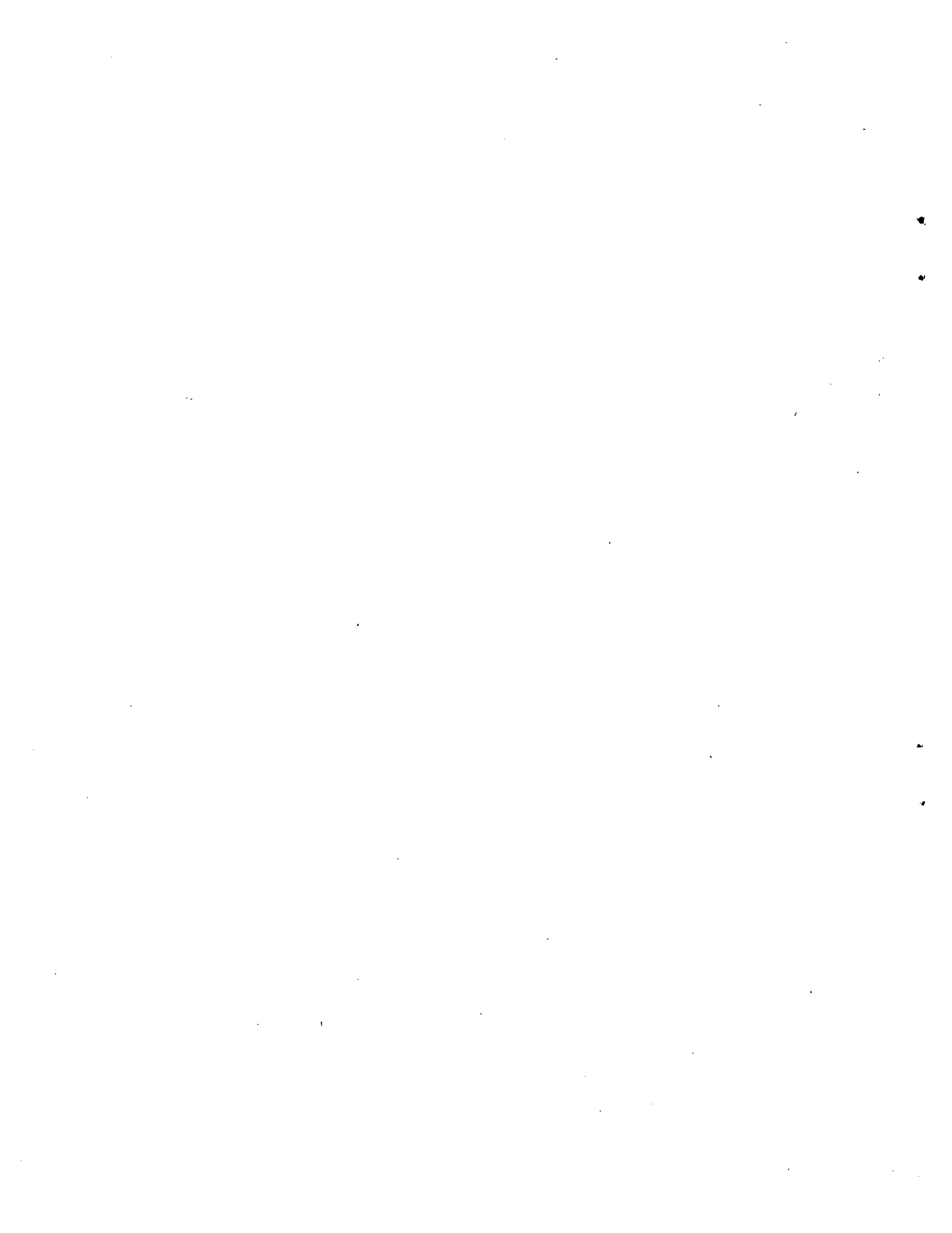
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\* The figures given in this table represent total net receipts from sales of publications with 15, 20 or 35 per cent discount, as the case may be.

\*\* 1 January to 15 May.

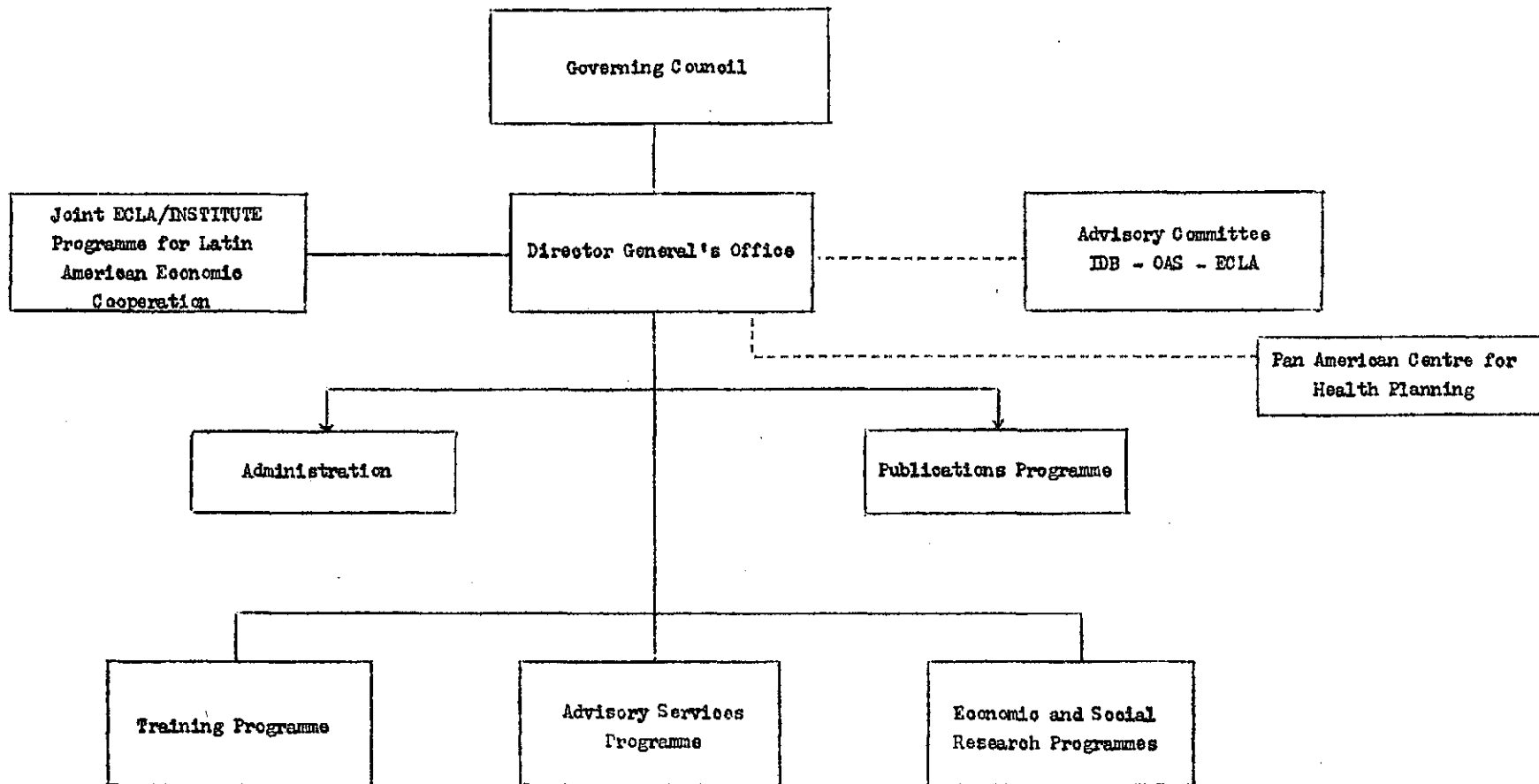
\*\*\* At the United Nations exchange rates in force during the years under consideration, this figure is equivalent to 20,741.70 dollars. The sum total of the two columns would therefore be 45,839.99 dollars.

APPENDIXES

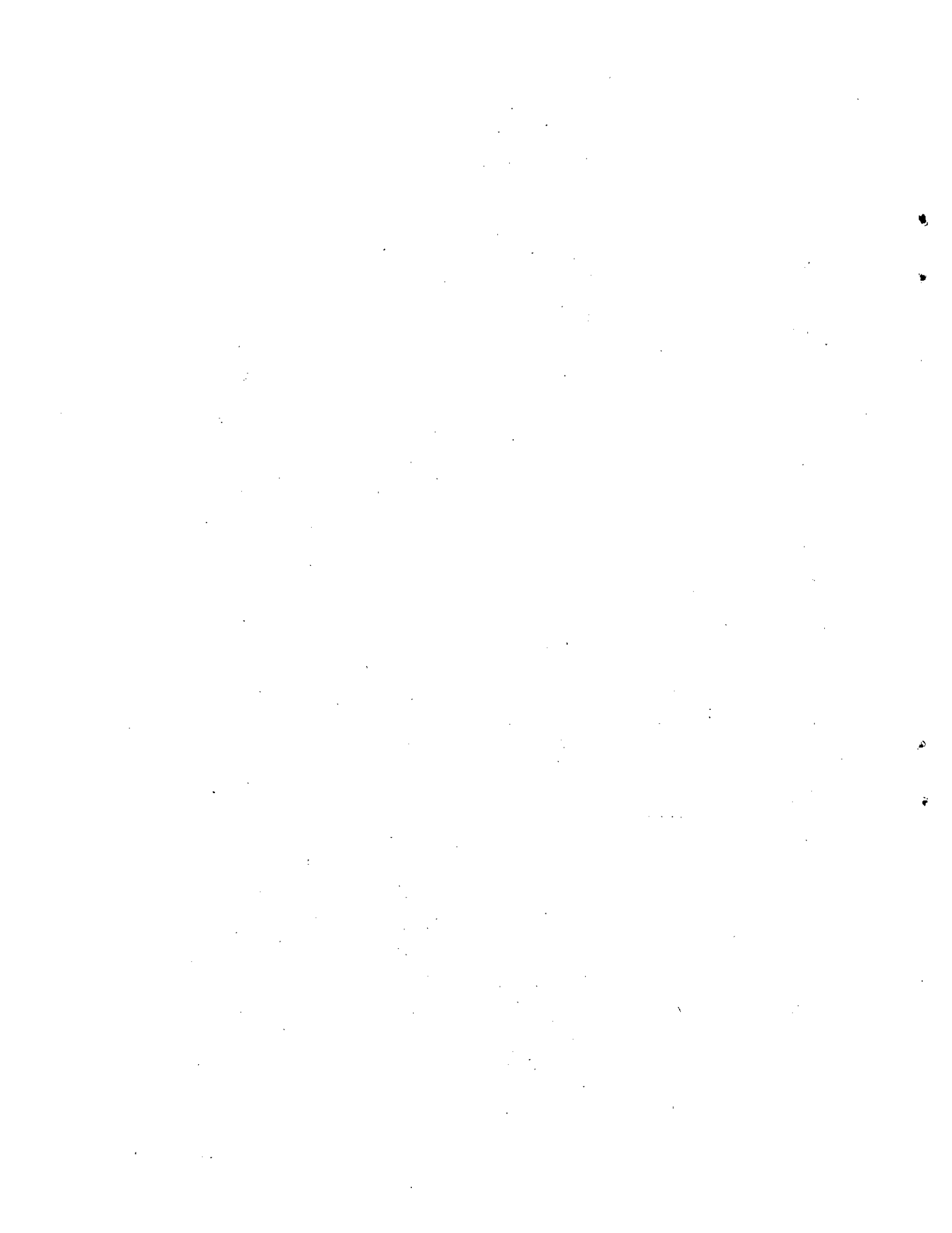


Appendix I

APPROVED ORGANIZATIONAL CHART FOR PHASE III OF THE LATIN AMERICAN INSTITUTE FOR ECONOMIC AND SOCIAL PLANNING

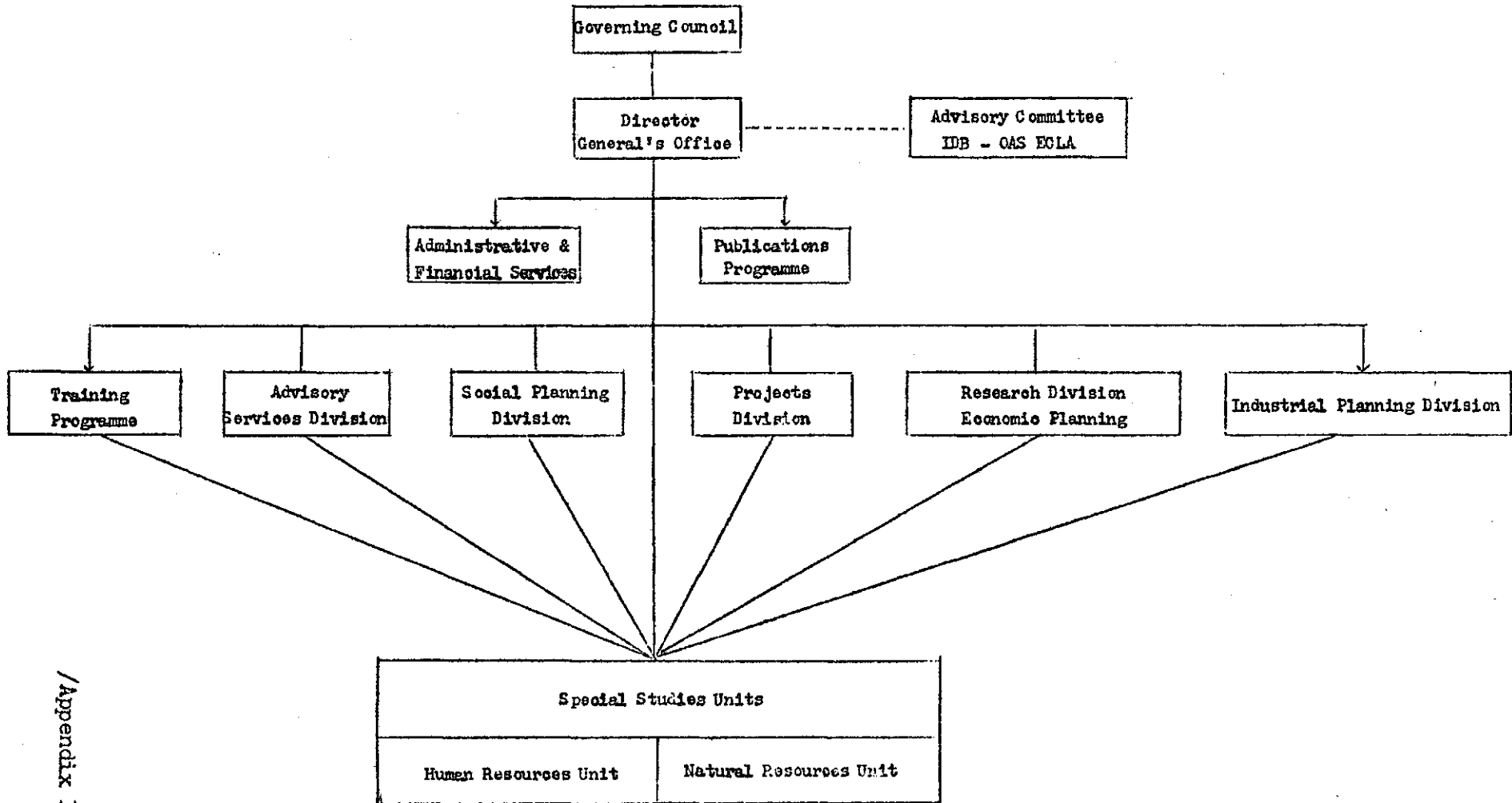


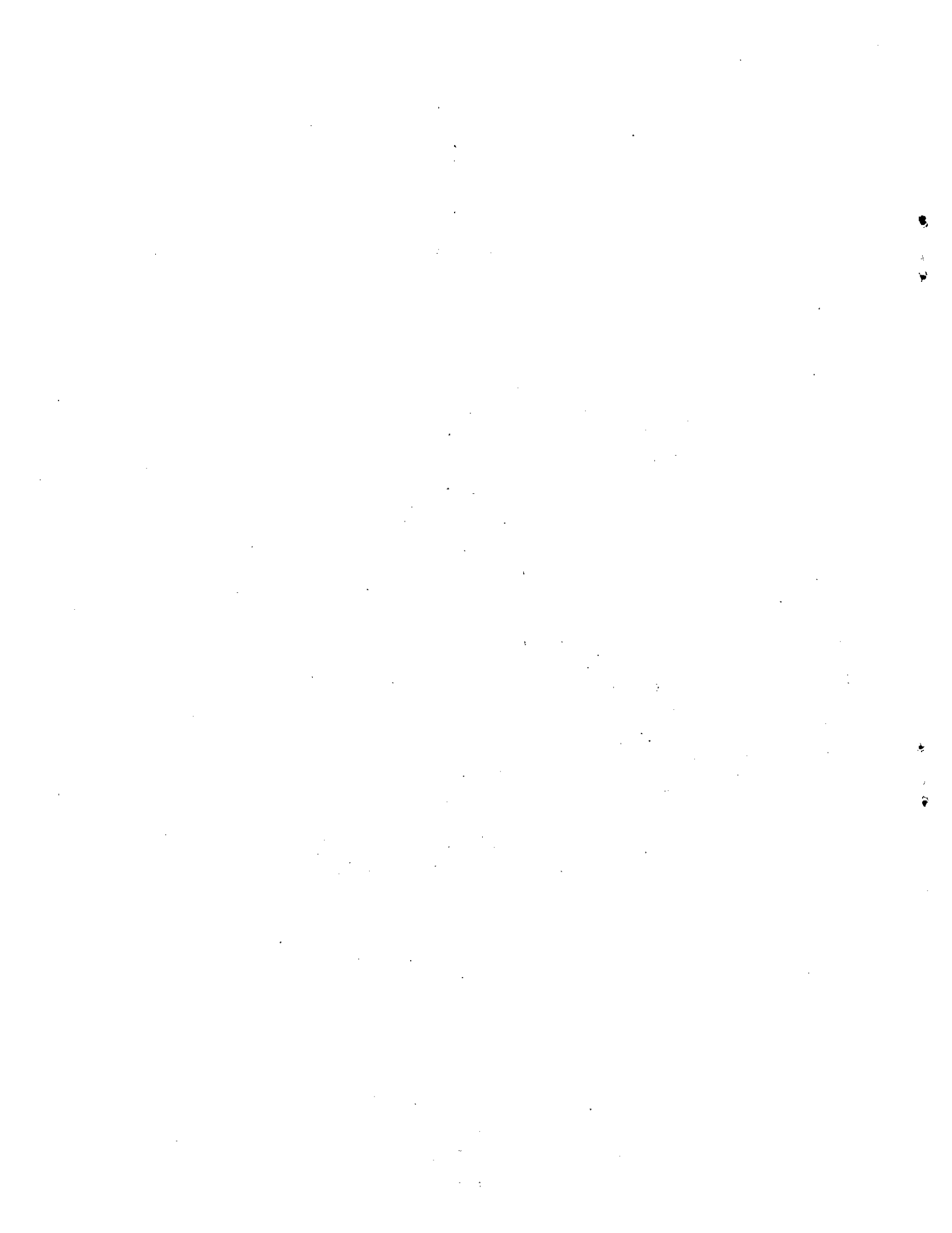




Appendix II

ORGANIZATIONAL CHART OF THE LATIN AMERICAN INSTITUTE FOR ECONOMIC AND SOCIAL PLANNING DURING PHASE II





APPENDIX III

INVENTORY TO 31 DECEMBER 1970

BREAKDOWN OF INVENTORY

a) <u>Furniture, Fixtures and other Equipment</u>		\$ 42,375.84
Acquisitions: PT 107 September 1970	\$ 489.47	
PT 107 October 1970	\$ 95.46	
PT 107 December 1970	\$ <u>610.30</u>	610.30
Less: Write-off PT 107 June 1970		
PT 107 June 1970		<u>(\$ 700.49)</u> \$ 42,870.58
b) <u>Business Machines:</u>		
Inventory, 31 December 1970		\$ 33,607.38
c) <u>Transportation Equipment</u>		
Inventory, 31 December 1970		<u>\$ 3,916.35</u>
TOTAL INVENTORY 31 DECEMBER 1970		<u>\$ 80,394.31</u>
<u>Distribution of Inventory</u>		
- On hand at Institute, 31 December 1970		\$ 80,181.86
- On loan to the International Children's Garden (Furniture items)		<u>\$ 212.45</u>
TOTAL INVENTORY 31 DECEMBER 1970		<u>\$ 80,394.31</u>



