

ACIONES UNIDAS



CEPAL

ILPES

INSTITUTO
LATINOAMERICANO DE
PLANIFICACION
ECONOMICA Y
SOCIAL

RESTRICTED

E/CEPAL/ILPES/R.15
June 1980

ENGLISH

ORIGINAL: SPANISH



UNITED NATIONS DEVELOPMENT PROGRAMME

PROJECT DOCUMENT

LATIN AMERICAN INSTITUTE FOR ECONOMIC AND
SOCIAL PLANNING (PHASE VI)

RLA/79/040/A/01/52

THE UNIVERSITY OF CHICAGO
DEPARTMENT OF CHEMISTRY
5809 S. UNIVERSITY AVE.
CHICAGO, ILL. 60637

UNITED NATIONS DEVELOPMENT PROGRAMME

PROJECT DOCUMENT

Title: Latin American Institute for Economic and Social
Planning (Phase VI)

Number: RLA/79/040/A/01/52

Duration: 24 months

Primary function: Institutional development and direct training

Sector: 20. General Economic and Social Policy and Planning

Subsector: 2010. Economic and Social Planning

Executing agency: Economic Commission for Latin America

Date of initiation: 1 January 1980

CEPAL inputs: US\$ 928,400 (in kind)

UNDP inputs: US\$ 2,481,900

Government
contributions: US\$ 260,000

Signed _____
on behalf of CEPAL

Date _____

on behalf of UNDP

Date _____

THE UNIVERSITY OF CHICAGO

PH.D. THESIS

THE UNIVERSITY OF CHICAGO
PH.D. THESIS

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO

THE

UNIVERSITY

OF

CHICAGO

PART I

LEGAL CONTEXT

The Institute was established by the Committee of the Whole of CEPAL in resolution 218 (AC.50) adopted at its eighth session, in February 1962, and subsequently amended on 6 June 1962 in resolution 220 (AC.52) at its ninth session. On 8 June 1962, the Chairman of the Governing Council of ILPES, UNDP (then the Special Fund), the United Nations and the Director General of the Institute signed the Plan of Operations for the first phase of the project. This stated that the objective of the project was to assist the Institute "as an autonomous agency under the aegis of CEPAL".

In resolution 340 (AC.66) on the "Latin American Institute for Economic and Social Planning", adopted at the Eight session (New York, 24 and 25 January 1974), the Committee of the Whole of CEPAL laid down "that the Latin American Institute for Economic and Social Planning (ILPES), established by resolution 220 (AC.52) of the ninth session of the Committee of the Whole, become a permanent institution of the Commission, with its own identity and responsible directly to the Executive Secretary of ECLA, who shall represent it before the member Governments".

Under Resolution 220 (AC.52), the Committee of the Whole of the Economic Commission for Latin America entrusted ILPES with responsibility 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 CEPAL Resolution 351 (XVI) the governments laid down explicitly as one of ILPES's functions that of co-operating in the exchange of experience and research results on global, sectoral and regional (area)

/planning between

planning between the planning bodies of member countries, so as to promote collaboration among them.

At its Second Session, held in the Dominican Republic in March 1977, CDCC ^{1/} established machinery for gathering together the planners of the Caribbean. The governments laid down that CEPAL should act as the Technical Secretariat, assisted by ILPES.

In pursuance of Resolution 351 (XVI) the I Conference of Ministers and Heads of Planning of Latin America was held in April 1977 in Caracas, Venezuela. The role played by planning in the development of the region was highlighted once again at that Meeting, and machinery was established to stimulate co-operation through planning.

In Resolution 371 (XVII), of May 1977, CEPAL expressed support for the establishment of the System of Co-operation and Co-ordination among Planning Bodies of Latin America established in Caracas, resolved that ILPES should assist the ministers and heads of planning in their joint co-operation efforts and expressed full support for the activities of the Institute.

The II Conference of Ministers and Heads of Planning was held in Lima, Peru from 15 to 18 November 1978.

The resolutions adopted in Lima confirmed the importance of the System of Co-operation and Co-ordination among Planning Bodies, and gave widest possible support to ILPES's activities in training, advisory services and research.

In Resolution 397, adopted at its XVIII Session, held in La Paz, Bolivia, CEPAL recognized that ILPES is fulfilling the important role of giving impetus to the planning process in the region through its

^{1/} Caribbean Development and Co-operation Committee

training, advisory, research and co-operation activities among planning bodies, endorsed the recommendations of the II Conference of Ministers and Heads of Planning and stressed that the System of Co-operation has strengthened mutual co-operation links.

This project document is presented in the light of the recommendations of the II Conference of Ministers and Heads of Planning of Latin America, held in Lima, Peru, in November 1978, and CEPAL Resolution 397 of the Eighteenth Session, which, while supporting the work carried out by the Institute, requests the Executive Secretary of CEPAL, in conjunction with the Chairman of the Technical Committee of ILPES, to approach the Administrator of the United Nations Development Programme to secure the necessary support to continue the activities of ILPES in a Phase VI as from 1 January 1980. 1/

1/ Annex 1 contains the statements by Mr. Enrique Iglesias, Executive Secretary of CEPAL, and Mr. Gustavo González, Minister of Planning and Economic Policy of Panama and Chairman of the Technical Committee of ILPES.

PART II-A

DEVELOPMENT OBJECTIVES

At the request of governments, and by means of its activities in advisory services, training, research and co-operation among planning bodies, ILPES will:

- (a) Assist the countries of the region in their task of confronting the new problems and changing conditions of their economies with appropriate forms of planning and of development strategy, plan and project formulation;
- (b) Co-operate in the design, analysis and appraisal of economic and social policies;
- (c) Co-operate in strengthening the national economic and social planning systems;
- (d) Increase the skill and technical knowledge of staff members and specialists of the National Planning Systems;
- (e) Promote the exchange of knowledge and co-operation among planning bodies in the Latin American countries in order to draw benefit from country experience in confronting national circumstances and to promote joint action for economic and social development.

PART II-B

IMMEDIATE OBJECTIVES

- (a) Co-operate with the Governments in the preparation and updating of diagnoses; in the formulation of long-term strategies; in the preparation of medium-term plans; in the preparation of short-term plans; in plan implementation, supervision and evaluation; in the organization of national planning systems;
- (b) Carry out research on current priority issues for the countries of the Region, which will meet the needs of activities in training, advisory services and co-operation in planning;
- (c) Co-operate with the Governments of the Region through regional, subregional and national courses, in the provision of basic and specialized training for technical personnel working in the area of development planning and economic and social policy formulation;
- (d) Support the governments in their exchange of experience, horizontal co-operation and joint research; assist them in establishing and operating an information system for planning; support them in organizing the Conferences of Ministers and Heads of Planning and meetings on specific planning topics;
- (e) Make available to the Governments, through publications, the results of experiments and research carried out by ILPES and by the System of Co-operation and Co-ordination among Planning Bodies.

PART II-D

BACKGROUND AND JUSTIFICATION

In the past 16 years, UNDP has given support to ILPES in the form of five projects, the last of which covers the period from 28 February 1978 to 31 December 1979.

At various regional and subregional forums, particularly the CEPAL sessions, the Conferences of Ministers and Heads of Planning of Latin America, the meetings of the Technical Committee of ILPES and the subregional meetings of planning experts, the governments of the region have expressed their growing interest in the continuity of the Institute project financed by UNDP. The need for planning as basic tool for promoting economic and social development has been recognized and reiterated in the continent. At the same time, it is found clearly desirable to improve the techniques currently in use in this field, strengthen the national planning institutions and provide specialized training for the technical cadres in sufficient number to meet the growing needs of the economic and social planning process in the countries of the region.

ILPES, which has recently extended its functions in pursuance of the mandates of the governments, must make preparations for taking on ever more important and complex tasks starting in 1980. Not only is there a growing need in many countries of the region to intensify co-operation in development planning, but co-operation will be increasingly demanding in terms of the quality, efficiency and operational applicability of what is offered by the international agencies.

The complexity of this work arises from the fact that many Latin American governments have changed their models and styles of development in recent years. Some countries, for example, have met with substantial

/success in

success in their policies of opening up their economies to the world market; increasing non-traditional exports and liberalizing trade; others, on the other hand, have suffered from increased dependence on exports of primary products. Some countries have intensified State participation in the economy, while others have tended to reduce such participation. The size of the countries, their population and their resources have also led to profound differences in what can be achieved with given policies, and in the type of specific problem which must be faced. In other fields, also as an example, there is a contrast between those countries that are participating in economic integration agreements, which impose on them specific contractual obligations in external trade and investment, and those for which regional integration is no longer a really important factor.

It is easy to infer from the above that the role that governments assign to the planning process varies greatly - as do its objectives, the public plans and policies in which it takes shape, the forms it takes and the participants and organizations in it. However, as has been mentioned, it has been recognized that planning is a basic government instrument for attaining higher levels of development and that, accordingly, it is necessary to continue efforts to improve it, a task in which ILPES can assist at the request of Governments. Government interest in co-operation with ILPES has become clearly apparent, especially in the recent period. In the last six months, for example, ILPES has received an increasing number of requests from governments in the region, both for advisory services for their public agencies and for the organization of national training courses.

/Furthermore, not

Furthermore, not only has it become clear that it is desirable to strengthen planning to ensure the simultaneous achievement of social and economic objectives, and to serve as an efficient guide for economic and social policy, but also, in view of the emergence of new issues, which have been increasing in importance, it has become necessary to develop them in order to incorporate them formally in the overall planning process.

The above considerations also indicate that, from 1980, it will be necessary to continue providing direct advisory services and training and co-operating with planning bodies, and at the same time make systematic progress in analysing and further studying a number of basic topics which are included in this Project. In view of their complexity, and the need for constant updating of the Institute's experience in this field, this Research activity should play a central role. However, in view of the shortage of financial resources, the Institute's priorities will have to focus first and foremost on preserving a basic technical and operational infrastructure to enable it to continue meeting the most urgent needs of the Governments, broadening its research activities to the extent that additional resources are available, and endeavouring at the same time to update and revise its technical knowledge, making maximum use for that purpose of the technical staff which make up the basic infrastructure.

These general considerations apply to all the activities in the Institute's various programmes.

Within this context, one of the priority aims of the present project is to continue ILPES' training activities. Their justification arises from the growing need to improve the skills of the technical cadres in the national bodies responsible for planning, promoting and implementing activities designed to raise levels of economic and social development.

/Improvement of

Improvement of the operational efficiency of the public sector, both in development plan and programme formulation and in the process of decision making, implementation and follow-up, makes it necessary for the governments to possess planning specialists with a sound training in the foundations and techniques of resource allocation and the rational planning of activities and in methods of management and control.

It is obvious that the preparation of a balanced development plan should pay special attention to the social service sectors and the objectives of income redistribution. However, within these objectives account should be taken of the criterion of planning the various sectors so as to guarantee the best possible results over the economy as a whole.

Improvement of quality in development programming and management must occur at the various levels of the administration. It is essential to possess teams which are skilled in the planning and formulation of overall development policies, where technical judgement in allocating resources between sectors and between regions is essential in order to avoid global imbalances (internal and external), which can lead to inflation and unemployment, and also sectoral or regional imbalances.

At the sectoral level it is also vital to possess staff skilled both in the identification and analysis of existing or potentially usable resources and in the technological and organizational options for their exploitation. A capability to formulate and implement consistent sectoral programme, identifying their components in terms of projects, is an urgent need in many countries, especially in coping with specific shortages, such as energy, food, action in sectors affected by acute poverty, and so on.

At the regional level it is also necessary to improve the supply of suitable staff. The definition of consistent policies for regional development at the national level and the formulation of specific strategies and programmes for given regions also has priority. The establishment of regional development corporations in various countries of the region also calls for staff skilled in the implementation and administration of development programmes and projects.

In view of the complexity and variety of the circumstances facing Latin American countries, use can be made of the Institute's courses to promote consideration and discussion of the idea and practice of planning in Latin America and the various roles assigned to it in the region.

In view of the need to strengthen and improve national planning systems in Latin America, since there is an increasing need for more integrated and consistent government action to deal with the problems of national development and the development of the Region as a whole, ILPES, through its Advisory services, will assist the governments of the region in activities to which they attach priority, such as:

- Preparation and updating of diagnoses;
- Preparation of strategies and plans, policies, programmes and instruments for national, regional and metropolitan development;
- The formulation of specific sectoral policies and programmes;
- The identification and application of practical measures;
- The evaluation of strategies, plans, policies, programmes and instruments for national, regional and metropolitan development;
- The strengthening of the institutional machinery for planning;
- The strengthening of the national capability for participating in the processes of regional integration.

/Carrying out

Carrying out this work will give the Institute an opportunity to remain in direct touch with circumstances in the various countries, and this will represent a permanent source of identification of experience at the national level, and, accordingly, of inputs to its programmes of training and research applied to the concrete problems of development in Latin America. Moreover, the results of the research carried out at field level, and the alternation of its technical staff in the basic tasks of advisory services, research and training, will enable the Institution to work in an integrated manner and maintain a more unified body of thought on the problems of development.

In order to carry out its activities, the Institute, through this Project, will continue to give priority to the relatively less developed countries of Latin America and to the more backward areas of the developing countries.

Through its Research Programme, ILPES will be able to make progress in analyzing subjects which are lacking in clarity at present, or which have incorporated new elements that have still not been fully explained. Conceptual and technical progress in these fields will help to ensure that the Institute can continue its advisory services, training and co-operation among ministries of planning in a manner which is increasingly suited to regional needs.

Various fields are being identified in which the theory of planning has still not succeeded in formulating propositions whose context is sufficiently comprehensive and concrete to make it possible to propose and apply operational actions or policies. In some cases it is not clearly known how given sectoral policies can be made compatible with global policies, or the effect that social policies and programmes have on the economy as a whole. Nor is there a systematic perception of the

/best way

best way of incorporating certain aspects of development which have come to acquire vital importance only in recent years, within the overall policies and planning of development.

These gaps are increasingly making themselves felt, and for that reason the effort of renewal and addition of knowledge in some specific areas is becoming a crucial imperative for the Institute.

As a result, ILPES needs to devote a substantial proportion of its efforts and resources to reviewing, renewing and adding to its knowledge and technical capacity on the major topics of planning. This work should be carried out, in the first place, through specific projects, under the special responsibility of the Institute's Research Programme. In addition, all ILPES's technical staff will participate in internal Seminars, special meetings with other international experts, the exchange of information with other international academic institutions, and so on.

In pursuance of CEPAL resolutions 351 (XVI), 371 (XVII) and 397 (XVIII), and the agreements reached in the meetings of the Technical Committee and of Ministers and Heads of Planning, ILPES will continue its action in support of the System of Co-operation and Co-ordination among Planning Bodies of Latin American and the Caribbean, in order to promote exchanges of national experience in economic and social planning and establish forms of joint action designed to stimulate, through planning, appropriate machinery for promoting co-operation and integration between the countries of the region.

The co-operation efforts being made by the planning bodies, to which ILPES has been closely linked, and which have recently shown themselves to be valuable tools for co-operation with solid political and technical support, are also directed towards the achievement of the

/objectives of

objectives of Technical Co-operation among Developing Countries (TCDC), which "has emerged has a new dimension of international co-operation for development, which gives expression to the developing world's determination to achieve national and collective self-reliance and to the need to bring about the new international economic order".^{1/}

The highest authority of the System is composed of the Ministers and Heads of Planning of Latin America, who meet periodically in the most important forum of the region to consider progress and obstacles in planning and to guide co-operation activities.

The Ministers and Heads of Planning and the Economic Commission for Latin America have entrusted ILPES with the new task of supporting the Governments in the operation of the System.

^{1/} See Report of the United Nations Conference on Technical Co-operation among Developing Countries, Buenos Aires, 30 August - 12 September 1978.

PART II-E

RESULTS

Most important results of the Training Activities

- Training of 50 specialists a year in the Central Planning Course;
- Training of 20 specialists a year in the Course on environmental variables in development policies and plans;
- Training of 25 specialists a year in the Social Planning Course;
- Training of 180 specialists a year in the National Courses;
- Influencing of 900 officials a year through support to National Training Centres;
- Strengthening of the organization of the National Training Centres.

Most important results of the Advisory Services Activities

Advisory Services to Brazil (State of Minas Gerais)

As regards the Strengthening of the Information System for planning

- Regional Account of the State
- Basic State statistics
- Economic and social indicators

As regards the implementation of the Medium-term Plan 1980-84

to draw up and apply:

- Body of mutually consistent short-term policies;
- Programme budgets reflecting the programmes and projects contained in the Medium-term Plan;
- System for following up and supervising programmes and projects.

As regards co-operation in the implementation of the development

Project for the La Mata Zone:

- Organization of agricultural production in the La Mata Zone;

/- Reduction of

- Reduction of existing economic and social disparities between large and small agricultural landowners and landless tenants;
- Increasing productivity and output per unit area cultivated and per person employed.

Bolivia (Advisory Services in Regional Planning)

- Spatial Diagnosis;
- Regional Strategy;
- Regional Medium-term Development Plans;
- Strengthening of the National and Regional Planning System.

Ecuador

As regards the preparation of the Development Plan:

- National Development Plan 1980-1984.

As regards the implementation of the Medium-term Plan:

- Set of mutually consistent policies;
- Programme budgets which reflect the programmes and projects contained in the Development Plan 1980-1984;
- Improvement of a system for following up and supervising programmes and projects.

Haiti

- Technical and institutional strengthening of the planning systems and projects;
- Improvement of a system for following up and supervising programmes and projects.

Venezuela

- Institutional strengthening of the national planning system;
- Strengthening of the bodies responsible for the formulation and implementation of social policies and the eradication of extreme poverty;

- Inputs for the formulation and implementation of export promotion policies;
- Strengthening of the bodies responsible for the preparation of the Population Censuses.

Panama

- Participation in laying the Foundations of the Master Plan for Inter-ocean Transport;
- Formulation of Specific Projects for the Canal Zone.

Guatemala

- Strengthening of the bodies responsible for the formulation and implementation of social programmes and projects.

Most important results of the Research activities

- Reports on the status of and prospects for planning in each country and the region as a whole;
- Reports on the State and planning which will deal with such aspects as: public enterprises and the various social agents, new dimensions of development planning and action by the Public Sector, relationship between the planning process and State policies;
- Reports on Planning and Social Policies;
- Reports on social development and planning which deal with such topics as methods and techniques for social planning, preinvestment and social projects and administration of social programmes;
- Reports on the regional dimension of planning which deal with such aspects as regional planning in small countries, spatial distribution of the productive forces in Latin American countries, operational aspects of regional planning.

/Most important

Most important results of Co-operation Among Planning Bodies

- Background information on the experience of planning bodies available to governments to promote co-operation;
- Exchange of experience and knowledge, and its use to deal with national situations;
- Technical co-operation among planning bodies;
- Definition and application of joint action to promote co-operation and integration through planning.

Most important results of Publications activities

- Dissemination of the experience and technical inputs of the planning bodies and ILPES through: books, cuadernos, the Planning Bulletin and working documents prepared by the Governments and by ILPES.

PART II F

DESCRIPTION OF PROJECT ACTIVITIES

	<u>Place</u>	<u>Date</u>
II F 1.0.0 <u>Activities under the Training Programme</u>		

During 1980 to 1981 the ILPES Training Programme will undertake a group of activities designed to train planning specialists, provide further training for professional and technical staff working in the national systems for planning and allocation of resources, provide support to the national training centres and academic units investigating or teaching planning, prepare studies, texts and specialized bibliographies within this field more intensively and thoroughly.

II F 1.1.0 Course

The Institute will provide training, further training and extension courses at its Headquarters and in the countries of the region.

Headquarters will be the location of the Central Planning Course and those which are of regional interest and which, because of their characteristics, demand a period of preparation prior to the concentration of intellectual and technical resources.

In the individual countries it will hold intensive training courses in the fields of its competence which interest the governments and where a joint effort is agreed upon. It will also promote training courses in the countries which have national centres or similar institutions.

Subregional courses will be given on subjects of common interest for a group of countries.

II F 1.1.1 Central Planning Course

Place

Date

The Central Planning Course will constitute the Institute's main activity in the field of training during Phase VI. This course enables the Institute to offer professionals from the region an alternative source of knowledge, reflection and discussion on the major themes of development and planning in Latin America. In addition, it highlights the experience of the Institute in advisory services, research and support for co-ordination of the region's planning systems.

The aim of the course is to bring out the fact that planning is a whole, inserting in it the processes of economic policy and the elements of sectoral and regional policies, within the context of a development strategy. It also lays emphasis on the strategic nature of planning, underlining the definition of the style of development and the articulation of the strategies with action in the medium and short term. The course focuses attention on the recent development of techniques, methodologies and instruments for planning, with a constant assessment of their appropriateness for regional experience and circumstances.

The course consists of a common introductory section and two alternative specialization sections.

/Each section

Place Date

Each section is composed of subject areas, with a variable number of subjects. In the joint section there are two areas. The first, consolidation course seeks to provide the participants with a common and homogeneous language and knowledge through study of subjects such as mathematics, statistics, social accounting and economic analysis. The second subject area seeks to introduce the participants to the major themes of development and their interpretation and encourage them to discuss them.

The course offers two possibilities of specialization:

- Overall Planning and Economic Policy
- Regional Planning.

The first covers a set of subjects of a theoretical, methodological and instrumental nature. It refers in particular to the specific techniques of planning at the overall level, from the construction of macroeconomic models to their use as tools for planning and definition of national policies and strategies for development. It studies the tools of economic policy, as an instrument to pursue in the short term the directions laid down by the planning system. In this way, it thoroughly analyses such tools as fiscal policy, monetary policy, policy on the external sector, distribution

/of income

of income and of employment. This section also Place
analyses some sectoral aspects of planning Date
(agricultural, industrial, social) and the
organization of economic areas by means of planned
regional action.

The specialization section in Regional Planning
is designed to show and discuss how efforts to promote
regional development are a fundamental aspect of the
process of rural development, in the countries of the
region. This section highlights the operational
aspects and the process of planning at the regional
level in connexion with the national plans. Special
importance is given to the strategic aspects of
projects and investment.

For the Institute the course (in its two
sections) represents a substantial effort of 30 weeks
of classes. The participants are provided with more
than 6 thousand pages of bibliographical material
per pupil, and this is in large part especially
prepared on the basis of the course for the academic
and professional staff who give it.

CENTRAL COURSE ACTIVITIES (HEADQUARTERS)

	<u>1980</u>	<u>1981</u>
1. Management and design	June September 1979	June September 1980
2. Recruitment of teaching staff	October December 1979	October December 1980
3. Preparation of Curricula and Bibliographies	January 1980 July	January 1981 July
4. Promotion	October 1979	October 1980
5. Receipt of candidatures	November- December 1979	November- December 1980
6. Selection of participants	January 1980	January 1981
7. Preparations for start	March 1980	March 1981
8. Course	April - November 1980 <u>1/</u>	April - November 1981 <u>1/</u>
9. Appraisal	December 1980	December 1981

1/ In August there will be a split into three specializations: overall, regional and another subject (employment, projects, and so on).

Place Date

A third specialization may be given, such as Planning and Employment Policy, Quantitative and Technical Methods of Planning, Planning and Short-term Economic Policy, Projects, Public Sector Planning, and so on.

II F 1.1.2 Other international courses

The following courses will be given at the Headquarters of the Institute in the period 1980-1981, for all the countries of Latin America and the Caribbean:

(i) Course on Environmental Variables in Development Policies and Plans, annually;

(ii) Course on Planning and Social Policies lasting three months, to be given annually.

II F 1.1.2 i. Course on environmental variables in development policies and plans

The Course will be carried out in Santiago, in close co-operation with the Spanish Centro Internacional de Formación en Ciencias Ambientales (CIFCA).

The principal objectives of the course are as follows:

- To offer an integrative interdisciplinary view of the environment, highlighting its interrelationships with other dimensions of the development process;

/- to show

Place Date

- to show and exchange techniques of analysis and instruments for the study of the problems posed by this integration, and environmental deterioration, and ensure proper treatment for its possible solutions, and
- to promote the establishment of the conceptual basis required for new approaches in methodology and intersectoral structuring, with special reference to their direct implications for aspects of management such as the rational use of natural resources, physical planning, institutional organization and legislation.

The Course is designed for:

- (a) Planners
- (b) Decision-makers or those participating in

that process in some way, to enable them to act within their various fields of action, in the handling of the environmental dimension.

This course will last about three months. It will cover the following main areas: Environment and Development, Ecology and Natural Resources, Economy and Environment, Organization of the Territory and Human Settlements, Assessment of Environmental Impact, Institutional Organization and Legislation and the application of these subjects to a practical environmental management case study.

ENVIRONMENT COURSE ACTIVITIES (HEADQUARTERS)

	<u>1980</u>	<u>1981</u>
1. Management and design	January April 1980	January April 1981
2. Recruitment of teaching staff	April May 1980	April May 1981
3. Preparation of curricula and bibliographies	May-July 1980	May-July 1981
4. Promotion	March 1980	March 1981
5. Receipt of candidatures	June- July 1980	June- July 1981
6. Selection of participants	July 1980	July 1981
7. Preparations for start	August 1980	August 1981
8. Course	September- October 1980	September- October 1981
9. Appraisal	October 1980	October 1981

(CONFIDENTIAL) SECRETARIAT OF THE ORGANIZATION OF AMERICAN STATES Place Date

II F 1.1.2 ii. Course on Planning and Social Policies

The Course will be carried out at the Headquarters of CEPAL/ILPES in close co-operation with UNICEF, and will last for two months.

The purpose of the Course on Planning and Social Policies is to explore the economic and social mechanisms which function in society, analysing the way in which they tend to concentrate the benefits of economic progress, to study the general ways in which they can be adjusted, and the specific instruments which can be used for that purpose, both at the macro-social level, and as regards the application of concrete measures.

This will make it necessary:

(a) To analyse, from the economic and sociological point of view, the features of development and the implications for social policy of the machinery, institutions and areas where they are formulated, decided upon and implemented. The first objectives of this analysis will be policies on income, employment and labour organization, and the second the consideration of what are usually termed traditional social policies: education, health, and nutrition, housing and social security. In addition, the new social policies which have emerged in the region - youth, culture, the family and women - were mentioned;

/(b) To present

Place Date

(b) To present systematically the body of social planning theory currently being formulated; the way in which priority social problems are posed and their possible solutions;

(c) To provide the participants with the tools needed for making diagnoses and formulating specific social policies and projects. This includes a statistical review of the methods and techniques of social research;

(d) To introduce the participants to the problems of financing social policy, in order to reestablish equality of status for social and economic objectives and their common framework of possibilities and constraints.

The Course on Planning and Social Policies will contain a general exposition of current knowledge of development and social planning, and also the methods of analysis and tools of economic and social policy which are commonly used.

It will examine the possible practical application of the theories and methods of social planning to Latin American circumstances, highlighting the desirability of approaching problems as one aspect of the national development effort. Furthermore, there will be a special analysis of the position of specific social groups, in particular the population strata experiencing extreme poverty.

SOCIAL PLANNING COURSE ACTIVITIES (HEADQUARTERS)

	<u>1980</u>	<u>1981</u>
1. Management and design	July-Oct. 1979	July-Oct. 1980
2. Recruitment of teaching staff	Oct.-Dec. 1979	Oct.-Dec. 1980
3. Preparation of curricula and bibliographies	Nov. 79 - Jan. 1980	Nov. 1980 Jan. 1981
4. Promotion	Nov. 1980	Nov. 1981
5. Receipt of candidatures	Dec. 1979 - January 1980	Dec. 1980 - January 1981
6. Selection of participants	January 1980	January 1981
7. Preparation for start	February 1980	February 1981
8. Course	March - May 1980	March - May 1981
9. Appraisal	June 1980	June 1981

/II F 1.1.3.

Place

Date

II F 1.1.3. National Courses

In developing Phase VI, the ILPES training programme will renew its efforts to meet demand for training in the region, in accordance with the guidelines laid down by the governments and in the UNDP projects.

This means that during 1980-1981 about four national courses will be held per year. The ILPES national courses are devoted to the following subjects:

- Overall Planning and Economic Policy
- Planning and Social Policies
- Regional Planning
- Planning and Agricultural Policies
- Planning and Industrial Policies
- Short-term Planning

For 1980 the Training Programme plans in principle to hold national courses in Bolivia, Costa Rica, the Dominican Republic, Jamaica, Panama and Venezuela.

As far as national courses are concerned, the Institute is considering the possibility of extending the planning of activities during 1980-1981 in the light of the resources available and country requirements.

These courses usually last twelve weeks and are designed to provide an introduction to specific subjects. They are divided

/into two

	<u>Place</u>	<u>Date</u>
into two levels, the first basic and		
introductory in nature and the second normally		
of an instrumental type, seeking to provide		
basic tools for the planner's work in the		
subject covered by the course. This level		
is also designed to illustrate national experience		
in the field of planning covered by the course,		
with the aim of giving the participants a		
view of reality and permitting active participation		
in formulating diagnoses, outlining policies and		
proposing alternative actions.		

/NATIONAL COURSE

NATIONAL COURSE ACTIVITIES - 1980-1981

	Time (months)	Number of months before start
1. Management and design	3	7
2. Recruitment of teaching staff	2	5
3. Preparation of curricula and bibliographies	3	3
4. Promotion	2	2
5. Receipt of candidatures	1 month maximum	1 $\frac{1}{2}$
6. Selection of participants	$\frac{1}{2}$	1
7. Preparation for start	-	-
8. Course	3	-
9. Appraisal	1	After

/II P. 1.1.4.

	<u>Place</u>	<u>Date</u>
<p>II F 1.1.4. <u>Courses in Agricultural Planning</u> (PROCADES Project)</p>		
<p>The Institute's Training Programme is to participate, together with FAO, in the courses on Agricultural Planning scheduled under the PROCADES Project which they jointly organize.</p> <p>This project involves one international course and four national courses.</p>		<p>To be determined</p>

<p>II F 1.2.0. <u>Support for and co-operation with National Centres</u></p>		
<p>The Institute will increase its co-operation with the national training centres in the countries and promote instruction and training in planning.</p> <p>Within this context, it will increase its co-operation with CENDEC in Brazil and CECADE in Mexico, and will formalize the recent agreements with INP in Peru, CENDES in Venezuela and INAD in Guatemala. Links will also be established with Training Centres in the Caribbean countries, with a view to the organization of Courses for the Subregion.</p>	<p>Headquarters Mexico Brazil Peru Venezuela Guatemala Other countries</p>	<p>To be determined</p>

This co-operation will involve the preparation and holding of joint national and regional courses, participation by teaching staff from national centres in the ILPES courses as teachers, assistants and trainees, preparation of national case studies and exercises and seminars on planning experience in the countries.

/II F 1.3.0.

	<u>Place</u>	<u>Date</u>
II F 1.3.0. <u>Links with academic centres</u>		
The ILPES Training Programme will increase its links with academic centres as a way of broadening the network of co-operation with university institutions engaged in teaching and research on planning.	Headquarters and Latin American countries	June 1980 Dec. 1981

For this purpose the agreement with the Institute of Social Studies in The Hague will be revised and renewed, and it is hoped to formalize the steps being taken to arrange links with the Institute of Economic Development in the University of Sussex, the Centre for Development Studies of the University of Wales and the Technological Institute of the University of Karlsruhe.

II F 1.4.0. Special studies

The Training Programme, in co-operation with the Institute's other programmes, and particularly the research programme, will develop activities, studies and research designed to provide support for the teaching activities and the preparation of texts and teaching materials. For this purpose, the following activities are planned:

To be determined

- Workshop on development planning, made up of a group of national papers illustrating the application of the various development planning techniques.

/- Economic

- | | <u>Place</u> | <u>Date</u> |
|---|--------------|-------------|
| - Economic analysis for planning. Text derived from the courses. | | |
| - Manual of Development Planning. Text prepared on the basis of the classes and exercises given in the courses. | | |
| - Economic Policy for Development. Text prepared on the basis of the classes and exercises in the courses. | | |

II F 2.0.0. Activities in the Advisory Services Programme

II F 2.1.0. Brazil

In its programme of support for planning and development in the relatively less developed areas of the larger countries in Latin America, the Institute will continue to provide advisory services to the State of Minas Gerais, the region of the Nordeste as a whole (through SUDENE) and some States in particular.

The advisory services to Minas Gerais will involve co-operation with the Government of the State in: strengthening the information system for planning, and particularly improving the regional accounts of the State; implementing the Medium-term Plan 1980-84 through the stages of formulation of short-term policies, definition of budget programmes, establishment of a system of following up and supervising programmes and projects.

Co-operation will continue in the design and application of the Project for the Development of the La Mata Zone (PRODEMATA), through the following stages: organization of the joint co-operatives for agricultural production, introduction of greater flexibility in credit, principally to small farmers and landless peasants.

<u>Activities</u>	<u>Place</u>	<u>Date</u>
- Preparation for Missions	Headquarters	
- Missions	State of Minas Gerais	Jan. 1980 Dec. 1981
- Preparation of Recommendations	Headquarters State of Minas Gerais	

II F 2.2.0. Bolivia

Co-operation will continue with the Government of Bolivia in the field of regional planning in the formulation of the national strategy for regional development in the long term and in the formulation of regional development plans and in the corresponding annual operational plans, for the various Regional Development Corporations.

Activities

- Preparation for Missions	Headquarters	
- Missions	Bolivia	Jan. 1980 Dec. 1980
- Preparation of Recommendations	Headquarters Bolivia	

II F 2.3.0. Ecuador

In pursuance of Agreement ATY/SF-1595-EC between the Government of the Republic of Ecuador and the Inter-American Development Bank (IDB), the Institute will continue to provide advisory

/services to

services to the government in the formulation of a national strategy for long-term development to serve as a general framework for the preparation of a National Medium-term Development Plan 1980-1984, a task for which co-operation from ILPES has also been sought, and for the incorporation of aspects of regional development in the process of national planning. The Institute and the Government will also co-operate in transferring programming techniques to the staff of JUNAPLA with the other units linked to the National Planning System (SNP) and in the co-ordination of JUNAPLA's activities with those of the sectoral planning offices in the various ministries and those of the regional planning agencies.

Activities

- | | | |
|----------------------------------|-------------------------|------------------------|
| - Preparation for Missions | Headquarters | |
| - Missions | Ecuador | Jan. 1980
Dec. 1981 |
| - Preparation of Recommendations | Headquarters
Ecuador | |

/II F 2.4.0.

II F 2.4.0. Haiti Place Date

The Government of Haiti has expressed a wish for technical co-operation with IDB for the implementation of a programme for the technical and institutional strengthening of the systems of planning and projects.

IDB has approved the financing of the project, and the Government has selected ILPES to advise it in the implementation of the programme, with the purpose of ensuring:

- The strengthening of the technical and operational capacity of the existing systems in general and sectoral programming and the identification, preparation, assessment and supervision of implementation of investment programmes and projects; and
- The establishment of a permanent national capability in the above-mentioned areas, by means of short seminars and, in particular, on-the-job training of national professional and technical personnel.

For these purposes ILPES will co-operate with the Government of Haiti in:

- Analysing the present status of the organization and operation of the national systems of planning and projects;
- Implementing the Medium-term Plan through:
 - preparation of an investment programme
 - formulation and application of the programmes and projects

/ - Supervising

- | | <u>Place</u> | <u>Date</u> |
|---|--------------|-------------|
| - Supervising and evaluating the Medium-term Plan through: | | |
| - design of systems and techniques for programme and project evaluation | | |
| - design of machinery for supervising and readjusting the Plan | | |
| - on-the-job training of local technical staff | | |

Activities

- | | | |
|----------------------------------|--------------|----------|
| - Preparation for Missions | Headquarters | |
| - Missions | Haiti | Jan.1980 |
| | | Dec.1981 |
| - Preparation of Recommendations | Headquarters | |
| | Haiti | |

II F 2.5.0. Venezuela

In close co-operation with CEPAL and the United Nations Department of Technical Co-operation, advisory services will continue to be provided to the Oficina Central de Coordinación y Planificación (CORDIPLAN) in:

- The formulation of a long-term development strategy
- The formulation of social policies with special emphasis on the eradication of critical poverty and social marginality
- The design of policies to promote non-traditional exports
- The preparation of a methodological grounding for the 1980 Population Census.

Activities

	<u>Place</u>	<u>Date</u>
<u>Activities</u>		
- Preparation for Missions	Headquarters	
- Missions	Venezuela	Jan.1980 Dec.1980
- Preparation of Recommendations	Headquarters Venezuela	

II F 2.6.0. Panama

In close co-operation with CEPAL and the United Nations Department of Technical Co-operation, co-operation will continue with the Panama Canal authority in the aspects of the Panama Canal Zone Development Programme related to the transport sector and under the Torrijos-Carter Treaty.

For these purposes there will be co-operation with the Government in:

- The preparation of a Transport Plan
- The preparation of projects related to the Canal Zone: ports, railway, roads and production sectors related to shipping.

Activities

- Preparations for Missions	Headquarters CEPAL/ Mexico	
- Missions	Panama	Jan.1980 Dec.1981
- Preparation of Recommendations	Headquarters Panama CEPAL/ Mexico	

/II F 2.7.0. Guatemala

II F 2.7.0. Guatemala

The Government of Guatemala has expressed the wish to co-operate with ILPES in the formulation of a long-term social strategy, comprising the design of the diagnosis, the projections and the strategy proper.

Activities

- Preparations for Missions Headquarters
- Missions Guatemala
Jan.1980
Dec.1980
- Preparation of Recommendations Headquarters
Guatemala

II F 2.3.0. Advisory Services to Nicaragua

Co-operation, together with the CEPAL Office in Mexico City, in strengthening the Nicaraguan national planning process and system.

Activities

- Preparation for Missions Headquarters Jan.1980
- Missions Nicaragua Dec.1981
- Preparation of Recommendations CEPAL Office/
Mexico

II F 2.9.0. Advisory Assistance Yet to be Planned

Technical co-operation with countries at their request.

/II F 3.0.0.

Place Date

II F 3.0.0. Activities under the Research Programme

During the project period, the Programme will embark on the following research activities:

1. The status of planning in Latin America;
2. State and planning;
3. Planning and social policies;
4. The regional dimension of planning.

It will also support work on other subjects such as:

the environment and development planning; planning and science and technology; planning and integration processes; planning in various styles of development; the time horizon of planning, planning and population.

II F 3.1.0. The State of Planning in Latin America

One of the central projects in the Research Programme will be aimed at analysing the present state of planning in the countries of the region. Its initial results will be presented to the III Conference of Ministers and Heads of Planning, to be held in Guatemala City, and to the Meeting of Caribbean Planners. This study will include, in the first part, a description of the planning systems and processes in the countries of Latin America and the Caribbean, and in the second part, an analysis of the various types of planning process and the principal problems they face.

It will be used not only for discussion at the above-mentioned meeting of planners, but to determine the planning problems which require priority efforts.

/This research

This research is being carried out in close contact with the planning bodies of the region, and its results will be used in all the Institute's activities.

One of ILPES' fundamental tasks, in view of its specific nature, is to keep the study permanently updated, and this will be complemented by the Information System for Co-operation in Planning.

Activities

- | | <u>Place</u> | <u>Date</u> |
|---|-------------------|--------------------------|
| 1. Preparation of the document on the State of Planning in Latin America. | Santiago | January
February 1980 |
| 2. Submission of the document to the III Conference of Ministers of Planning of Latin America. | Guatemala City | March or
April |
| 3. Revision and publication of the documents submitted to the Conference. | Santiago | May-July |
| 4. Selection of bodies and consultants to carry out research on Changes in the planning systems in selected countries. | Various countries | August |
| 5. Sub-contracting with research bodies and contracting of consultants. Conduct of the research. | Various countries | August |
| 6. Preparation of a summary document on Changes in the planning systems. Editing and publication. | Santiago | January-
March 1981 |
| 7. Technical Seminar to discuss the document on Changes in Planning systems in Latin America. | Santiago | April-
October |
| 8. Design, preparation and drafting of the ILPES document to be submitted to the IV Conference of Ministers of Planning | Santiago | April-
October |
| | /9. | Submission |

	<u>Place</u>	<u>Date</u>
9. Submission of a preliminary draft of the document, in a Technical Seminar	Santiago	November
10. Revision, editing and publication of the final document to be submitted to the IV. Conference of Ministers of Planning	Santiago	December

II F 3.2.0. State and Planning

ILPES will continue its research on State and Planning, the general foundations for which are to be found in the Project for Phase V, and which in brief terms aims to help to improve the operational capacity of the State in the field of economic and social development policy.

In Phase VI efforts will be made:

(a) To continue the research on transformations which have occurred in the structure of the State, the roles assumed by the State and the way in which this has had an influence on the size as a structure of the public sector and on the characteristics of State policies. Special attention will be given to the new dimensions of development planning, the relationship between social and economic objectives, including their effects on the organization and planning of the public sector.

(b) To continue the national studies on the role of public enterprises in the economy and in the State apparatus, together with a study of their relations with the process of planning.

/(c) To

- (c) To analyse the existing relations between the process of planning and State policies.
- (d) To explore existing possibilities of initiating studies on the problems of organizing and administering planning activities.

Activities

- | | <u>Place</u> | <u>Date</u> |
|--|---|------------------------|
| 1. Comparative analysis of the concept of the role of the State in planning | Santiago and countries to be determined | Jan. 1980
Dec. 1981 |
| 2. Future prospects for State participation in entrepreneurial activity. (Summary of the national studies on public enterprises mentioned below) | Santiago | July 1980 |
| 3. Completion of the research pending from Phase V on public enterprises in Costa Rica, the Dominican Republic and Panama | In the countries concerned | January -
Feb. 1980 |
| 4. Publication of the corresponding documents | Santiago | March |
| 5. Central American Seminar on Public Enterprises (in co-operation with various institutions and universities from the subregion) | San José
Costa Rica | April |
| 6. Subcontracting or contracting of the research on public enterprises in Peru | Lima | May |
| 7. Conduct of the research | Lima | June-
December |
| 8. Discussion of the document on public enterprises in Peru submitted to the Workshop on Public Policies | Santiago | December |

/9. Subcontracting

	<u>Place</u>	<u>Date</u>
9. Subcontracting of research bodies and contracting of consultants to carry out research on the position of public enterprises in Colombia, Argentina and Mexico	Countries concerned	January
10. Conduct of the research	Countries concerned	February - July
11. Presentation of the documents, revision and publication in mimeo form	Santiago	August
12. Technical Seminar on Public Enterprises	To be determined	September
13. Revision of the documents, editing and publication in book form	Santiago	October - December

II F 3.3.0. Planning and Social Policies

Although the economies of the region have grown at a high rate in the past decade, this growth has not been able to solve the basic social problems of the peoples of Latin America. ILPES has attached particular importance to dealing with social planning in its research, courses and advisory services, but it is necessary to intensify efforts to focus on the technical and organizational aspects of the social programmes in the context of general planning.

The purpose of the research, therefore, is to study social planning techniques further in order to ensure consistency between the economic and social aspects in the development plans, giving special emphasis to the organizational and financing requirements of the social programmes.

/Subjects such

Subjects such as the following will be covered: methods and techniques of social planning, preinvestment and social projects, administration and social programmes and sectoral and regional social planning.

These studies will be carried out in close contact with CEPAL, CELADE and other agencies within the United Nations system, such as UNICEF, UNESCO and WHO, as well as the most qualified national centres and private consultants.

The results thus obtained will be incorporated in ILPES activities, but will contribute in particular to improving the social planning courses which the Institute has been giving very successfully, and to improving the advisory services provided on social topics.

Activities

	Place	Date
1. Completion of research pending from Phase V on Argentina, Uruguay, Colombia and Peru	Santiago and countries concerned	January - Feb. 1980
2. Seminar on Social Policies to discuss the final versions of these papers	To be determined	April or May
3. Subcontracting of research bodies and contracting of consultants to conduct the new research taking into account the results of the previous seminar. (Six contracts and subcontracts)	Santiago	June
4. Preparation of a book on social planning to be published together with UNICEF and linked to the Training Programme for use in the courses.	Santiago	January - June

/5. Seminar

	<u>Place</u>	<u>Date</u>
5. Seminar on organization and social participation (cosponsored by the Interagency Project on Critical Poverty in Latin America)	To be determined	August
6. Revision, editing and publication of the documents submitted in book form	Santiago	September - December
7. Submission of the results of the subcontracted research	Santiago	December
8. Revision, editing and publication in mimeo form	Santiago	January
9. Technical Seminar on Social Policies	Santiago to be determined	January March or April
10. Subcontracting of research bodies and contracting of consultants to conduct the new research in the field of social planning	Santiago	March
11. Publication of a book with the results of the seminar on Social Planning	Santiago	April - May
12. Conduct of the subcontracted research	In the country concerned	April - October
13. Presentation of the results, revision, editing and publication in mimeo form	Santiago	November
14. Revision, editing and publication in book form, of the papers presented to the seminar	Santiago	December
15. Seminar on Social Policies	To be determined	December

/II F 3:4.0.

II F 3.4.0. The Regional Dimension of Planning

Great progress has been made in recent years in the field of regional planning, including the question of the relationship between urban and rural development. ILPES has carried out important, creative work in this field through training, advisory services, publications and international meetings. The Seminar on National Regional Development Strategies held in September 1979 in Bogotá represented a valuable opportunity for discussing and systematizing the progress made, and should offer a new starting point for future activities.

The results of this Seminar will be presented to the Third Meeting of Ministers and Heads of Planning to be held in Guatemala in the first half of 1980. The exchange of ideas on the topic and the recommendations stemming from the meeting will guide future ILPES activities in this field during the period covered by the project.

In addition, some basic and operational research will be undertaken to contribute to the viability of the regional development efforts being made by a number of Latin American countries.

This research will deal with:

(a) Regional planning in small countries. This project has been agreed upon as part of the ILPES/ISS Agreement and its basic objective will be to shed light on the specific modalities of regional planning in small countries. This research was recommended as a priority topic at the Second Conference of Ministers and Heads of Planning, held in Lima, Peru, in 1978.

(b) Spatial distribution of productive forces in Latin American countries. Analysis of the present spatial configuration of our countries, and future trends, for the purpose of identifying determining factors and studying their consequences; all of this with a view to defining regional development strategies.

/(c) Operational

(c) Operational aspects of regional planning. The topic of this project is associated with the need to advance in the design of the concrete machinery for inserting specific regional plans within national development plans. ILPES has already carried out some theoretical work on this topic.

Activities

	<u>Place</u>	<u>Date</u>
1. Final design of the project	Santiago	January - March 1980
2. Secondary research (bibliography and consultations)	The Hague	April - May 1980
3. Primary research on selected case studies	Various countries of Latin America	June - August 1980
4. SIAP Working Group Meeting	Santiago	August 1980
5. Preliminary report	Santiago	September 1980
6. Preparation of final report	Santiago	October - November 1980
7. Reproduction, translation into English publication	Santiago	December 1980 February 1981

/PLANNING AND

PLANNING AND ENVIRONMENT

The concept of development has been changing continuously and incorporating new elements, notable among which are the environment and the quality of life, which have not only enriched the concept but have made it possible to adopt a new comprehensive approach to the entire development process. The research on Styles of Development and Environment which is being carried out by CEPAL and UNEP has, firstly, thrown new light on environmental factors in development, and secondly has demonstrated the need for further study of the complex interrelationships between development and the environment, and for a continued search for concrete ways of incorporating the environmental dimension in development policies and plans.

ILPES's concern with this topic is not new. In 1978, together with CIFCA, it organized a Seminar-Course on "The Environmental Dimension in Development Policies and Plans", while in 1979, also jointly with CIFCA, it organized a Seminar-Course on "The Environmental Dimension in Project Formulation and Evaluation".

These two seminar-courses, which were attended by Latin American government officials holding senior posts in their countries' Planning Agencies, demonstrated the interest in this subject which exists in the region.

In 1980-1981 the Institute plans to continue analysing the problem posed by the incorporation of the environmental dimension in the formulation and implementation of development plans and policies, and to review concepts and working methods related to environmental problems and development planning, in an endeavour to lay a foundation for the integration of environmental aspects in development plans and policies.

Environmental factors will also be incorporated in the activities in training, advisory services and co-operation between planning bodies.

ACTIVITIES

	<u>Place</u>	<u>Date</u>
1. Joint projects on planning and environment together with the CEPAL/UNEP Environment Co-ordination Unit, the Styles of Development and Environment project and the UNEP Regional Office.	Santiago and Mexico City	January 1980 Dec. 1981
2. Research on techniques for incorporating the environmental dimension in development plans: Preparation of an outline of the research, search for sources of finance and implementation.	Santiago	January 1980 Dec. 1981
3. Research on institutional and legal aspects of the Environment (financing pending) in co-operation with the UNEP Regional Office.	Santiago and various countries of the region	January- December 1980
4. Internal seminar (ILPES/CEPAL/CELADE/ROLA) on the incorporation of the environmental dimension in development plans.	Santiago	February 1980
5. Participation in the organization of the Course on Environmental Management in Development (jointly with CIFCA).	Santiago	April- June 1980 April- May 1981
6. Laying the foundations for the incorporation of the Environmental Dimension in the ILPES general courses.	To be determined	To be determined
7. Participation in laying the foundations for the incorporation of the Environmental Dimension in the ILPES advisory missions to the Governments of the region.	To be determined	To be determined

/8. Participation

	<u>Place</u>	<u>Date</u>
8. Participation in the organization of Horizontal Co-operation programmes.	To be determined	To be determined
9. Relations with Institutes and specialized Centres, Universities and bodies which work in areas connected with this activity.	To be determined	To be determined
10. Participation in the preparation of papers to be presented at Conferences and Meetings of the System of Co-operation and Co-ordination among Planning Bodies.	To be determined	To be determined

II F 4.0.0. Activities of the Programme for Co-operation among Planning Bodies

In this area ILPES will attach priority to: support for the organization and operation of the System of Co-operation and Co-ordination among Planning Bodies; support for the Conferences of Ministers and Heads of Planning and technical meetings on planning; co-operation with other regions; participation of planning bodies in ILPES activities; and publications.

The Programme will carry out these activities in close contact with the Programmes of Advisory Services, Training and Research and with the CEPAL System; and with UNDP and other international and bilateral co-operation agencies.

II F 4.1.0. Activities in support of Planning Bodies for the suitable organization and operation of the System of Co-operation and Co-ordination among Planning Bodies

II F 4.1.1. Exchange of experience:

ILPES will keep an up-to-date list of directors and experts of planning bodies and will support them in their exchanges of information and documents on their planning experience. ILPES will keep them permanently informed of the results of its activities as secretariat of the system, and will provide them with the data produced on the state of planning in the region.

Place Date

Activities in the Exchange of Experience

ILPES	Jan. 1980
headquarters	Dec. 1981
Countries of Latin America and the Caribbean	

/II F 4.1.2.

II F 4.1.2. Information System for Co-operation in Planning

	<u>Place</u>	<u>Date</u>
Set up at the Second Conference of Ministers and Heads of Planning held in Lima, Peru. Its basic objective is to obtain, process and distribute information produced by planning offices in order to foster co-operation and mutual understanding. The aim is to strengthen the planning process in the region through action in the specific area of information. The organizational and operational bases of the system were established at a meeting of planning and information experts organized by ILPES and CLADES at CEPAL/ILPES headquarters in June 1979. This project will be the joint responsibility of CLADES and ILPES and will receive support from CELADE/DOCPAL and the Caribbean Documentation Centre operating from the CEPAL Office for the Caribbean (Port of Spain).		

The International Development Research Centre (IDRC) of Canada is providing valuable technical and financial support for the setting up and implementation of this system. Financial co-operation has also been received from the Government of the Netherlands.

The organization and operation of the system will continue being established by planning agencies with the support of ILPES and CLADES. This system will be related to the Information Orientation System set up by UNDP for the purposes of horizontal co-operation and with other systems linked to development planning.

	<u>Place</u>	<u>Date</u>
<u>Activities of the Information System</u>		
Continuation of work on designing the System	Headquarters Latin American countries	Jan. - June 1980
Supply of basic services by the System	Headquarters	July 1980
- Selective dissemination of information	Latin American and Caribbean countries	Dec. 1981
- Preparation of lists of Periodical Publications on Planning		
- Publication of PLANINDEX containing biblio- graphical information and summaries of documents on planning entered in the data base.		
- Publication of summaries of Development Plans and Programmes		

II F 4.2.0. Horizontal Co-operation

Activities:

- Continuation of work on designing the system of horizontal co-operation including machinery for ascertaining the technical capacities for providing co-operation of agencies as well as co-operation needs.	Headquarters	January - August 1980
- Joint preparation with CLADES of a register of technical capacities of planners of Latin America and the Caribbean	Headquarters	January - August 1980
- Promotion of horizontal co-operation operations in accordance with planning bodies	Countries of Latin America and the Caribbean	Jan. 1980 Dec. 1981

/II F 4.3.0.

II F 4.3.0. Co-operation among Centres for
Training in Planning

The bases have already been laid for strengthening machinery for co-operation among planning centres in the region.

Place Date

Activities

Implementation of machinery for exchange of information, experience, co-operation in teaching and joint action in the field of training.

Headquarters June 1980
and countries Dec. 1981
of Latin
America and
the Caribbean

II F 4.4.0. Support for Conferences of Ministers
and Heads of Planning and technical meetings on
planning

The following activities will be undertaken:

- Support for the organization of the Third and Fourth Conferences of Ministers and Heads of Planning.

Headquarters Jan. 1980 -
Guatemala Dec. 1981

- Jointly with CEPAL Office for the Caribbean, support for meetings of planning experts of the Caribbean.

Headquarters Jan.-May
Port-of-Spain 1980
Jamaica

- Together with the other Institute programmes, technical meetings will be organized on priority topics referred to in the Research Programme,

Headquarters Jan. 1980 -
and countries Dec. 1981
of Latin
America and
the Caribbean

Consideration has been given to technical meetings on topics such as the following: Planning and Projects; Short-Term Planning; Experience in

/Planning Methods;

	<u>Place</u>	<u>Date</u>
Planning Methods; Social Planning; Environmental Planning; Statistics and Planning; State and Planning.		
<u>II F 4.5.0. Co-operation with other Regions</u>		
In accordance with the recommendations of CEPAL and the Conferences of Ministers and Heads of Planning, links will be strengthened with the Economic Commissions for Asia and for Africa and with the Planning Institutes of those regions. Asia	Headquarters Countries of Latin America and the Caribbean, Africa and Asia	June 1980 - Dec. 1981
Encouragement will continue to be given to the exchange of experience for the programming of future joint activities. A meeting of planners to exchange planning experience in Latin America, Asia and Africa will be considered as an initial activity.		

II F 4.6.0. Publications

Publications will become the basic means of placing the results of the experience and research produced by the System of Co-operation and ILPES at the disposal of planning bodies. The <u>Planning Bulletin</u> , <u>Notes and News</u> and the " <u>Temas de Planificación</u> " series will continue to be published.	Headquarters	Jan. 1980 - Dec. 1981
--	--------------	--------------------------

The publication of texts and Cuadernos will continue and be strengthened, and their distribution promoted among all planning bodies and institutions and persons directly linked with planning.

/A great

Place Date

A great effort will be made to prepare publications in English and in other languages used in the region.

II F 4.7.0. Participation of directors and experts of planning bodies in ILPES activities

ILPES will continue to be strengthened by the direct participation of directors and experts of planning bodies in its activities. Headquarters and countries of the region March 1980 - Dec. 1981

This participation could take the following forms:

- Participation in training programmes;
- Participation in advisory missions;
- Participation in research programmes, particularly the research on the State of Planning.

PART II. G.

INPUTS

A. Description of CEPAL inputs

1. Permanent staff

(a) CEPAL will provide 72 man/months per year of international professional staff and 120 man/months per year of supporting staff, all full time, to constitute the infrastructure of ILPES;

(b) CEPAL will also furnish the services of members of its professional staff to collaborate in research activities;

(c) CEPAL will contribute the services of regional experts assigned to the secretariat and, where necessary, of its own staff members, for the training, advisory and co-operation activities in the field of planning envisaged within the framework of the project;

(d) CEPAL will provide ILPES with the results of its studies on styles of development and environment and on the inclusion of environmental aspects in the economic and social development planning process, and will collaborate in the preparation of teaching material and designing courses or special topics relating to the planning of the environmental variables of development.

2. Operational and administrative services

As executing agency, CEPAL will be responsible for operational and administrative services.

3. Other services

Together with ILPES, CEPAL will programme the supply of documents, reproduction and translation services.

/B. Description

B. Description of UNDP inputs

1. Experts and consultants

(a) In accordance with the project budget UNDP will provide 142 man/months of expert services in 1980 and 142 man/months in 1981, for training, research and advisory activities and co-ordination activities with planning ministries and agencies.

The following are the job descriptions for the experts and consultants ^{1/}:

11.01. Training Programme Director

University graduate with a doctorate in planning or a related field or a minimum of 15 years' experience in programming the teaching of planning.

He will have the following responsibilities:

- To direct, orient and evaluate the design and preparation of training courses in development planning, regional planning, social planning and sectoral planning;

- To link up activities with and among the regional and national training centres in Latin America;

11.02. Regional Planner

University graduate with a post graduate degree, specializing in economics and regional planning, or at least 10 years' academic and field experience.

His responsibilities will be as follows:

^{1/} In special circumstances which, in the opinion of the Director of the Institute, justify such a decision, he may on his own responsibility designate for posts persons who do not necessarily possess all the requirements, informing UNDP of his decision and giving the facts of the case.

- To collaborate in the design of the curricula for the international and national courses on regional planning organized by ILPES;
- To lecture on the central subjects of the regional planning courses;
- To undertake empirical research in his field and prepare papers on the subject for use in the ILPES courses;
- To collaborate in the programming and/or provision of advisory activities for the countries whenever the Director considers it necessary;
- To represent the Institute at international meetings, seminars and conferences in his field.

11.03. Expert in Planning Methods

University graduate with a post graduate degree, specializing in economics, planning methods and models, or at least ten years' academic and field experience.

He will have the following responsibilities:

- To collaborate in the design of the international and national courses on planning and economic policies organized by ILPES;
- To lecture on the basic and special subjects in the courses, such as economic analysis, planning theory, development programming models and methods and related topics;
- To undertake and direct empirical research on models and methods applicable to the reality of the region in support of teaching activities;
- To collaborate in advisory activities in the countries when the Director so requires;
- /- To represent

- To represent the Institute at international meetings, seminars and conferences in his field.

11.04. Agricultural Planner

University graduate with a post graduate degree or at least ten years' academic and field experience in economics and agricultural planning and rural development.

He will have the following responsibilities:

- To collaborate in the design of the international and national courses on planning, regional planning, and social planning organized by ILPES;

- To lecture on the basic and special subjects in those courses, such as economics and agricultural planning, rural development and related topics;

- To undertake empirical research in his field in support of training activities;

- To collaborate in advisory activities in countries when the Director so requires.

11.05. Consultant Lecturers

University graduates with post graduate degrees or wide experience in lecturing on the subjects not covered by permanent ILPES staff members.

They will have the following responsibilities:

- To lecture on basic and special subjects in the international and national planning courses organized by ILPES in the fields of global planning and economic policy, regional planning, social planning and other specialized areas;

/- To undertake

- To undertake and collaborate in empirical research in their fields in support of training activities;

- To collaborate with the Programme Director in all activities designed to optimize training activities.

11.06. Regional Programmer

University graduate with a post graduate degree or a minimum ten years' experience in regional planning activities.

He will have the following responsibilities:

- To prepare diagnoses of the economic and social space of the countries;

- To co-operate in the formulation of long-term spatial development strategies for the economies of the countries and harmonize them with the global economic and social development strategies;

- To co-operate with the countries in the preparation of their regional plans and harmonize them with the global and sectoral parts of their national development plans;

- To assist in the formulation of regional development policies.

11.07. General Programmer

University graduate with a post graduate degree or a minimum ten years' experience in planning activities.

He will have the following activities:

- To co-operate with governments in the evaluation of economic and social development processes, and in short-term studies;

- To advise countries on the formulation of long-term strategies and the preparation of medium-term plans;

- To co-operate in the preparation of programme budgeting, annual operational plans and monetary plans;

- To assist in improving systems of national accounts and economic and social indicators;

- To co-ordinate interdisciplinary teams to provide advisory services to countries.

11.08. Expert in Economic Policy

University graduate with a post graduate degree or a minimum 10 years' experience working in the national planning office, ministry of the economy or finance and/or, the central bank.

He will have the following responsibilities:

- To advise countries on the evaluation, formulation and harmonization of their economic policies;

- To co-operate with countries in policies for the financing of their development plans with special emphasis on determining the surplus in terms of government and external resources;

- To assist countries in the preparation of national investment programmes in keeping with domestic and external saving capacity, so as either to authorize feasible expenditures in annual operational plans or to orient correctly medium-term plans and long-term strategies.

11.09. Research Programme Director

University graduate with a doctorate in economics or sociology or a minimum of 15 years' experience, including specialized publications on planning.

He will have the following responsibilities:

- To supervise the course and performance of the work programme of the Research Programme;

- To advise the Director on all aspects relating to the Research Programme;

/- To

- To co-ordinate the various research activities undertaken within ILPES;
- To co-ordinate the activities carried out in ILPES and CEPAL in the fields of planning and social policy;
- To maintain regular links with research undertaken in CEPAL and other United Nations projects of interest to ILPES.

11.10. Expert for the Study of the State of Planning

University graduate in economics or social science with a post graduate degree or a minimum ten years' experience of work in planning.

He will have the following responsibilities:

- To analyse the different stages and levels of the planning process and system in the different countries of Latin America;
- To relate the different dimensions (economic, social, technological, etc.) of development and their planning;
- To propose solutions to the problems of planning in the Latin American countries;
- To participate in the training and advisory programmes.

11.11. Expert on the State and Planning

University graduate in social and political science with a post graduate degree or at least 10 years' experience in planning.

He will have the following responsibilities:

- To collaborate in the different activities of the project;
- To formulate the general framework of the subcontracted research and to undertake the substantive follow-up of that research;
- In particular, to collaborate in activities dealing with public enterprises, and the study of the planning processes in Latin America;

/- To

- To collaborate in editing the publications on the results of those lines of research, and assume responsibility for the ILPES Workshop on Public Policies;

- To participate in the advisory missions requested of the Project in his field of specialization.

11.12. Expert in Social Planning

University graduate in social science with a post graduate degree or at least ten years' experience in social planning.

He will have the following responsibilities:

- To formulate the general framework for the subcontracted research and assume responsibility for the substantive follow-up of that research;

- In particular, to carry out these activities in the field of planning and social policies;

- To edit the publications and gradually build up the theoretical corpus for ILPES teaching activities in planning and social policies;

- To participate in advisory missions and teaching activities in his field of specialization.

11.13. Consultants

University graduates specializing in economics or social science with doctoral-level degrees or broad experience in planning to participate in the various research activities and projects.

Funds (US\$ 50,000 annually) for the recruitment of short-term consultants to prepare the research studies on the State of Planning, Public Enterprises, Social Planning and Planning and Environment, to be undertaken within the project.

2. Supporting staff

Funds to finance supporting staff for project activities.

/3. Fellowships

3. Fellowships and seminars

The project provides for the sum of US\$ 420,000 for the two-year period 1980-1981 to finance 28 annual fellowships and seminars.

4. Travel

Travel funds for official missions of project experts.

5. Subcontracting

US\$ 100,000 for the subcontracting of special studies for the Research Programme.

C. Description of other inputs

1. Negotiations are underway to gain the support of the governments of The Netherlands and the Federal Republic of Germany to supplement the financing of training programme activities.

2. The Canadian IDRC has made a grant to CEPAL to set up the Information System for Co-operation in Planning. The Project is being executed by CLADES and ILPES with the co-operation of CELADE/DOCPAL. Support is also being received from the Government of The Netherlands.

3. Negotiations will be undertaken with the International Centre for Training in Environmental Sciences (CIFCA) for financing the cost of fellowships and supporting services for the regional courses on the environmental management of development which it is organizing jointly with ILPES in Santiago.

D. Description of government contributions

1. National training courses

(a) Various governments of the region are making an approximate contribution of US\$ 260,000 annually to support the activities of the Institute.

/(b) The

(b) The countries in which national training courses organized by ILPES, are held will provide the necessary infrastructure services and assume the cost of participation of students, lecturers and national co-ordinators in those courses.

(c) The cost of the services and travel of the international lecturers will be provided for in the UNDP country programmes for the countries concerned.

2. Advisory services

(a) The countries receiving ILPES advisory missions will provide counterpart personnel, offices for the experts and the necessary supporting services.

(b) The countries which enter into special agreements with ILPES for the provision of long-term advisory services will finance the entire cost of those services either through direct contributions of funds or through their respective indicative planning figures.

PART II. H.

PREPARATION OF THE PLAN OF WORK

The preliminary Plan of Work is included in the Project Document.

PART II. I.

PREPARATION OF THE FRAMEWORK FOR THE EFFECTIVE PARTICIPATION

OF CEPAL AND INTERNATIONAL STAFF IN THE PROJECT

The activities required to produce the results indicated and achieve the immediate objective of the project will be undertaken jointly by CEPAL staff and by the international experts and consultants assigned to it.

/The respective

The respective roles of the CEPAL staff and the international experts and consultants will be determined by the Executive Secretary and the Director of ILPES at the start of the project and will be set forth in a framework providing for the effective participation of CEPAL staff and the experts in the project. This framework, which will constitute an annex to the Project Document, will be reviewed periodically. The respective roles of the CEPAL staff and of the international experts and consultants will be in keeping with the established concept and specific purposes of technical co-operation.

PART II. J.

PROGRESS REPORTS

The ILPES Technical Committee and the Conference of Ministers and Heads of Planning will receive periodic reports on the progress of project activities. Similar reports will also be submitted to the governments of the region through the Resident Representative and at the two-yearly sessions of the Economic Commission for Latin America.

PART II. K.

INSTITUTIONAL FRAMEWORK

CEPAL will be the executing agency of the Project and will take all the necessary measures to implement it properly.

The Director of ILPES will be responsible for supervising the activities of the ILPES Project and will be responsible for his management to the Executive Secretary of CEPAL.

The project will be based in the United Nations Building in Santiago, Chile.

/The project

The project activities will be undertaken in close co-ordination with UNDP Resident Representatives in the countries in which they are to take place.

In undertaking project activities, CEPAL and the UNDP Liaison Office with CEPAL will make the appropriate arrangements for co-ordination where necessary with activities being carried out in the region as part of UNDP country projects and other regional projects receiving UNDP support. The Institute's activities in the countries should be made known in advance to the offices of the UNDP Resident Representatives and the CEPAL Subregional Offices in order to allow them to participate actively in ILPES missions.

The Latin American Demographic Centre (CELADE), the Latin American Centre for Economic and Social Documentation (CLADES) and the Environmental Co-ordination Programme, all of the CEPAL system, will lend their support in designing course material on population, economic and social technical documentation, and the environment, respectively, for incorporation in the training courses given by ILPES.

Functional relations in undertaking project activities will take place through the planning ministries or offices in the countries of the region.

The countries in which advisory or training activities take place will provide the resources and infrastructure needed for them to be carried out efficiently.

Some of the activities relating to the international course on regional development planning will be undertaken jointly with the Institute of Social Studies of The Hague under an agreement with ILPES.

PART II. L.

PRIOR OBLIGATIONS AND PREREQUISITES

(a) CEPAL has already taken the necessary steps for the inclusion of 72 man/months of international staff and 120 man/months of supporting staff in its regular budget, which will constitute the Institute's infrastructure in the two-year period 1980-1981.

(b) CEPAL possesses suitable institutional machinery to obtain subcontracting services and to link project activities with national, subregional, regional and international institutions or projects.

PART II. M.

FUTURE UNDP ASSISTANCE

The Latin American Institute for Economic and Social Planning is a permanent institution in its own right, especially set up by the governments of Latin America to provide advisory services and to organize and hold training courses on economic and social planning, undertake research and support co-operation activities among planning bodies of the region.

This being so, its activities, as well as its objectives, are continuing and permanent. As a result, its financing needs vary according to the training, advisory, research and co-operation needs of the governments of the region in the field of planning.

PART III

SCHEDULE OF CONTROL, APPRAISAL AND REPORTS

/PART III. A.

PART III. A.

TRIPARTITE CONTROL REVIEWS,

TECHNICAL REVIEWS

The project will undergo tripartite reviews in accordance with the policies and procedures established by UNDP to supervise the execution of project activities.

In consultation with ILPES and UNDP, CEPAL will agree in good time on the dates of such periodic reviews.

PART III. B.

APPRAISAL

The project will be subject to appraisal in accordance with the corresponding policies and procedures established by UNDP. The organization, terms of reference and dates will be decided upon in consultation between UNDP and CEPAL.

In the appraisal carried out in the last three months of the implementation of the Project, at least one government representative will take part, appointed by the Chairman of the ILPES Technical Committee together with a UNDP representative and a CEPAL/ILPES representative.

/PART III. C.

PART III. C.

PROGRESS REPORTS AND FINAL REPORTS

(a) CEPAL, in consultation with the UNDP Liaison Office with CEPAL, will prepare half-year progress reports on the project for submission to UNDP and the members of the ILPES Technical Committee. These will be submitted to UNDP, the members of the ILPES Technical Committee and the Annual Conference of Ministers and Heads of Planning of Latin America. These reports will also be submitted at the sessions of the Commission.

(b) CEPAL will prepare a six-monthly financial report for UNDP on the sums disbursed to date and an estimate of expenditures to be made in the forthcoming half year with a projection up to the conclusion of the project.

(c) At the end of Phase VI, CEPAL will prepare a final report indicating the results achieved and the steps which should be taken to implement the recommendations resulting from its activities.

UNDP CONTRIBUTION TO PROJECT BUDGET

(In US\$)

Country: Regional, Latin America

Number: RLA/79/040/A/01/52

Title: Latin American Institute for Economic and Social Planning (Phase VI)

	Total		1980		1981	
	M/M	US\$	M/M	US\$	M/M	US\$
10. Project personnel						
11. Experts						
11.01 Director Training Programme	24	113 500	12	54 000	12	59 500
11.02 Regional Planner	24	113 500	12	54 000	12	59 500
11.03 Expert Planning Methods	24	113 500	12	54 000	12	59 500
11.04 Agricultural Planner	24	113 500	12	54 000	12	59 500
11.05 Consultants-Lecturers	20	105 000	10	50 000	10	55 000
11.06 Regional Programmer	24	113 500	12	54 000	12	59 500
11.07 General Programmer	24	113 500	12	54 000	12	59 500
11.08 Economic Policy Expert	24	113 500	12	54 000	12	59 500
11.09 Director Research Programme	24	113 500	12	54 000	12	59 500
11.10 Expert for Study on the State of Planning	24	113 500	12	54 000	12	59 500
11.11 State and Planning Expert	24	113 500	12	54 000	12	59 500
11.12 Social Planning Expert	24	113 500	12	54 000	12	59 500
11.13 Consultants	12	40 000	6	20 000	6	20 000
11.99 Subtotal	296	1 393 500	148	664 000	148	729 500
13. Administrative support		262 200		125 200		137 000
15. Official travel		100 000		50 000		50 000
16. Mission travel		20 000		10 000		10 000
19. Running total		1 775 700		849 200		926 500
29. Subcontracts		100 000		50 000		50 000
30. Training						
32. Group training		420 000		200 000		220 000
33. Seminars		60 000		30 000		30 000
39. Running total		480 000		230 000		250 000
49. Equipment and supplies		10 000		5 000		5 000
59. Miscellaneous		116 200		57 000		59 200
99. Grand total		2 481 900		1 191 200		1 290 700