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AMERICA LATINA  
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## ANALYSIS OF THE SURVEY ON USERS OF THE MACROTHESAURUS

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## Introduction

In 1982, the ECLA Latin American Economic and Social Documentation Center (CLADES) prepared a survey which was widely distributed in the Latin American region and was aimed at collecting information to measure the level of use of the Macrothesaurus in the Latin American and Caribbean countries and at the same time to identify the problems experienced in applying it.

The initiative for carrying this survey out comes from a recommendation which emerged from the latest Technical meeting on Economic and Social Development Terminology: the OECD Macrothesaurus, held at CLADES from 1 to 3 July 1981.

This recommendation also expressed the concern felt by CLADES about the necessity for making an exploratory study since not much information was previously available concerning institutions using the Macrothesaurus in the region. It seemed indispensable to collect information which would make it possible first to put together a preliminary survey of institutions using this indexing tool and secondly to explore and evaluate problems which had arisen in its use. We have seen fit to bring to this meeting in a preliminary and exploratory document, some of the information collected in the survey.

To carry out the analysis made in this document, some of the data collected was selected and grouped into variables so as to provide the processed information needed to explain and describe the use of the Macrothesaurus in the region.

We need however to clarify a few points before beginning to consider the data. First, there is the fact that many institutions which received the questionnaire distributed an undesignated number of copies, on their own initiative, to other institutions, preventing us from knowing exactly how many questionnaires were distributed in the region.

However, since 200 copies were initially distributed by CLADES, this is the number which will be taken into account in our calculations. In all, 137 questionnaires were answered, of which 105 indicated that the Macrothesaurus was used while 32 institutions reported that they did not use it.

It should be stipulated that some of the centres which said they did not use this indexing tool deal with documentation in fields far removed from economic and social disciplines, which might mean that they had received surveys distributed outside of the areas originally taken into consideration by CLADES, as explained above.

The variables taken into consideration for purposes of this document relate to experience in the application of the Macrothesaurus measured in terms of the year in which this tool first came into use; the dates of the editions used, the purposes for which they are used, an evaluation of the advantages and drawbacks shown by the Macrothesaurus in its application and the frequency with which new descriptors should be created to meet the needs of Latin American development. An annex contains a directory of institutions in Latin America and Caribbean which replied that they use the Macrothesaurus up to the beginning of 1983.

#### Analysis of some variables

For the purpose of making the analysis of the replies more valid, it was decided that the method of work would be to classify those institutions which replied affirmatively to the questionnaire in accordance with a criterion.

##### 1. Distribution of the surveys by areas of development

For this purpose use was made of the categories defined by ECLA/CLADES "Informe de Diagnóstico Regional. La Infraestructura de Información para el Desarrollo: América Latina y el Caribe." In this document, information units were classified from two complementary points of view: First libraries and documentation centres were considered from the point of view of their capacity to respond to the needs for information on topics relating to the development of a society such as, for example, housing, public health and natural resources, and their requirements in terms of both scientific and technological and economic and social techniques and disciplines. On the other hand disciplines are also taken into consideration. When the two approaches (that of "development topics" and that of "disciplines") were combined, the result was a classification system of nine broad "areas of specialization", including:

1. History, international relations, geopolitics, geography, integration, projections, national security;
2. Public administration, political and administrative sciences, law, public powers;
3. Economic planning and policy, economics, commerce, international commerce, finance, public finance;

4. Social welfare, sociology, population, social policy, public health, social security, labour;
5. Education, communication sciences, mass communications, educational sciences, information and documentation, scientific policy;
6. Natural resources, environment, agriculture, energy;
7. Industry, business;
8. Public works, townplanning, transport, tourism, housing;
9. Anthropology, statistics, psychology.

The replies received were distributed as follows:

Area of specialization	Replies recorded
1	4
2	3
3	37
4	5
5	45
6	-
7	9
8	2
9	-

In the sample analysed, the highest concentration of replies was recorded in the three areas relating to planning, economics, commerce and the like and in area 5, which refers to education, communications sciences and related fields, showing that these are the main areas in which the Macrothesaurus is used in the region.

## 2. Distribution of the surveys by country

As stated above, the survey was distributed in Latin America and the Caribbean.

Below, separate lists in alphabetical order are shown for Latin America, the Caribbean and international bodies, showing the number of replies received.

**Central and South America**

Argentina	9
Bolivia	1
Brazil	9
Colombia	25
Costa Rica	4
Cuba	3
Chile	12
Ecuador	1
El Salvador	1
Guatemala	3
Honduras	1
Panama	1
Paraguay	1
Peru	7
Uruguay	6
Venezuela	6

**Caribbean**

Barbados	2
Guyana	2
Puerto Rico	1
Dominican Republic	2

**International and Regional Bodies**

ECLA	2
FLACSO	3
IDRC	2
Ibero-American Co-operation Institute	1

As may be seen, information was collected from a total of 20 countries, including 16 South and Central American countries and 4 Caribbean countries. The sample may therefore be regarded as being sufficiently broad to indicate that the problems pinpointed in the surveys are apt to be representative. Replies were also received from international or regional bodies.

**3. Use of the Macrothesaurus**

A total of 137 replies were received. Of these, 105, or 52.5% of all the 200 surveys distributed by ECLA/CLADES reported use of the Macrothesaurus. Non-use was reported by 16% (32 replies). These negative replies are, in general, concentrated in libraries and documentation centres working outside the economic and social field.

(a) Experience in the use of the Macrothesaurus

To measure this variable, the year in which the Macrothesaurus came into use was taken as an indicator.

We found it interesting to observe that a heavy concentration of replies relating to the inception of the use of the Macrothesaurus in libraries and documentation centres in the region is noted towards the end of the 1970s.

Thus, of the 83 replies received (19 surveys left this question unanswered), 63 indicate that this tool began to be used between the years 1978 and 1982. Only 23 showed that they began to use this indexing tool some time between the years 1972 and 1977.

Year in which first used		
Year/period	No. of cases	Percentage
1972-1977	23	21.9
1978	4	3.8
1979	17	16.2
1980	24	22.9
1981	10	9.5
1982	8	7.6
No data received	19	18.1
<b>TOTAL</b>	<b>105</b>	<b>100.00</b>

Thus, 59.6% of the information units indicate that they began to use the Macrothesaurus between 1978 and 1982, from which it may be inferred that experience in the application of this indexing tool is relatively new in the region, and this might be directly responsible for the comments made in the questionnaire with regard to the limitations of the Macrothesaurus.

(b) Editions of the Macrothesaurus used

It should be noted in the first place that since this is an open question, it elicited many replies in the questionnaire. In all, 116 replies were received since information units with more years of experience in indexing with the Macrothesaurus indicate that they have used two or more editions. Moreover double and triple replies were received in those cases in which information must be processed simultaneously in a number of languages. However, there were only one or two such cases so that their impact on the final evaluation is not great.

Editions of the Macrothesaurus	Spanish	English	French	Portuguese	Total
OECD 1979	71		3		74
OECD 1978		10			10
OECD 1973	12				12
IDBD 1974				10	10
CLADES 1973	11				11
TOTAL	94	10	3	10	117

If there is anything worth drawing attention to in this connection, it may be that of the 94 replies which indicate use of the Macrothesaurus in its Spanish version, 23 indicate use of very old versions which increase the difficulties of applying this tool. There might be any number of reasons for this; however, certain ones of them should be taken into account, such as the difficulty in obtaining foreign currency for purchasing this thesaurus, or failure to disseminate and promote this tool in the region, the difficulty which some countries experience in acquiring bibliographical material in the exterior, etc.

(c) Purposes for which the Macrothesaurus is used

One of the questions in the questionnaire refers to the use made of the Macrothesaurus in information units. This question also allows for a variety of replies, and therefore, more than 105 were received.

The replies were as follows:

For information analysis (indexing)	97
For selective dissemination of information	24
As subject headings	4
No information provided	5

(d) Questions relating to difficulties in using the Macrothesaurus

As one of the objectives of the survey was to measure such difficulties, the form included a number of questions which tackled this problem from different points of view.

The first made direct reference to whether the institutions encountered difficulties in the actual application of the Macrothesaurus. Out of a total of 105 replies 78 (74.2%) indicated that difficulties were encountered, and 27 (25.7%) that there were no difficulties.

The survey then goes on to categorize the difficulties from various aspects:

- (i) Limitations in the coverage of the semantic fields for the indexation of documents.
- (ii) Other limitations of the Macrothesaurus.
- (i) Limitations in the coverage of the semantic fields for the indexation of documents

The survey contained questions for measuring possible limitations in respect of the semantic fields in the Macrothesaurus of concepts relating to Latin American and Caribbean development. In order to give more freedom in replying, there was an open question which resulted in a broad range of replies corresponding to nearly every subject area for development. The questions considered were those for which the largest number of answers was received. Then they were classified on the basis of the nine fields of specialization mentioned before. The replies ranged as follows: field 3 - economic planning and policy, economics, commerce, international commerce, finance and public finance - with 41 answers; field 5 - education, communication sciences, mass communications, educational sciences, information and documentation, scientific policy - with 32 replies and field 7 - industry, business - with 10.

All of them suggest the need for further development of the following fields as classified in the Macrothesaurus:

- 02 Economic policy. Social policy. Planning.
- 03 Economic conditions. Economic research. Economic systems.
- 04 Institutional framework.
- 11 Public finance. Banking. International monetary relations.
- 12 Management. Productivity.

(ii) Other limitations of the Macrothesaurus

The survey also took into consideration other possible limitations of the Macrothesaurus which might make it difficult to use. Some of the limitations mentioned were that the tool is too generalized for the indexing of documents, that it does not suitably represent the development concepts of the Latin American and Caribbean region and that there are not enough scope notes and related terms.

To analyse these variables we have selected only those which seem to us to be of the broadest interest and in respect of which the greatest number of replies were received.

The first survey question we shall consider is the one relating to the possibility that the Macrothesaurus might be "very general", to which there were 47 affirmative replies, or 62% of all the 78 replies which indicated problems in the use of the Thesaurus.

The other variables which were taken into account are: the one indicating a lack of related terms. Here there were 27 affirmative replies, or 34.6% of all the replies received. It was also considered to be important to analyse the replies expressing the view that there were not enough scope notes. There were 27 such replies, i.e., 34.6% of all the difficulties noted, which, oddly enough, was the same percentage as in the previous case. In addition, consideration was given to three replies which indicated that the terms were inadequate for indexing concepts peculiar to regional development problems. There were 36 such replies, or 46.1% of the total. Finally, consideration was given to the replies indicating a need to create descriptors for filling the gap mentioned above. Taking the replies for two of the three levels of frequency considered in the survey (frequently, sometimes, never), the figures indicate that 67 of the 78 institutions (or 63.8% of all the institutions) feel the need to create new descriptors.

#### 4. Preliminary conclusions

With regard to the findings obtained by conducting the survey, we wish to draw a distinction between two types of observation - those which refer to the methodological requirements for future investigations of the same kind and those which correspond directly to the use of the Macrothesaurus.

Both points of view will therefore be reflected in the conclusions and recommendations which we are attaching.

##### Some general characteristics of the sample

In the first place, we would like to mention two things shown by this preliminary analysis which might affect the value of the conclusions presented in the report.

In the first place, the findings obtained indicate that the Macrothesaurus is a tool which only recently came into use in the region, and this makes it difficult for the users to identify its advantages and drawbacks as an indexing tool.

In addition, a relatively high percentage (approximately 25%) of the users employ old editions of the Macrothesaurus, which might account for the replies containing negative comments and indicating limitations in respect of the controlled vocabulary.

These characteristics may indicate that in future studies it will be indispensable: a) first to divide the sample in accordance with the editions of the Macrothesaurus which are being used for the purpose of distinguishing between difficulties which might correspond to limitations in the Macrothesaurus itself and those which might be due to the obsolescence of the editions; b) to divide the sample into time categories reflecting the experience acquired in the use of the Macrothesaurus (5 or more years of use, 3 to 4 years of use, etc.) so as to make it possible to incorporate this factor explicitly in the analysis of the problems presented in the use of the Macrothesaurus and thus to tell whether the problems which have arisen are intrinsic to the tool itself or result from inexperience in its use.

There follows a summary of the conclusions drawn with regard to specific points raised in this document.

#### Validity of the sample

The geographic coverage of the survey was sufficiently broad (20 countries and 4 international regional bodies) for significance to be attached to the findings obtained.

#### Semantic fields

The analysis of the survey gives rise to observations with regard to the need to expand some of the semantic fields in the Macrothesaurus. In this connection mention may be made of 02, 03, 04, 11 and 12.

We think that these suggestions should be seriously considered since a majority of highly representative institutions in the economic, finance and public and private banking and the whole range of institutions dedicated to higher education and culture have asked for the expansion of certain fields as a way of facilitating the indexing of the documentation under their responsibility. We would like to point out, as well, that the subject areas covered by these institutions fall into the social and economic field, core subjects of the Macrothesaurus. These suggestions could be indicating a limitation of the controlled vocabulary.

#### Other limitations of the Macrothesaurus

Some of the results obtained in these problem areas, such as, for example, the widespread need to create descriptors (74.2%), are closely linked to the point raised above. It is likely that if the subject category fields mentioned above were expanded, the need to create descriptors would decline notably.

On the other hand, the other limitations mentioned fairly frequently (34.6% in both cases) relate to the limited number of related terms and scope notes, which has a direct effect on the difficulties encountered in using the Macrothesaurus.

Finally, we wish to stress the preliminary nature of this survey and the advisability of continuing these investigations, taking advantage of the methodological experience acquired by ECLA/CLADES.

We believe it is of the utmost importance, as a first step in this direction, to make an exhaustive survey by country of the institutions using the Macrothesaurus.



## Annex

## DIRECTORY OF INSTITUTIONS USING THE MACROTHESAURUS

In this annex of the document, a list of the 105 institutions which answered the survey is given.

This may be one of the most important parts of the document since it contains the first reliable data collected concerning the users of the Macrothesaurus in the Latin American and the Caribbean region, although it is not an exhaustive list.

The institutions have been classified by country and within the countries in alphabetical order. A separate list is given of the international and regional bodies covered by the questionnaire.

It should be noted that the names of some institutions appear more than once; this is because different sections of one same institution use the Macrothesaurus for indexing collections of documents. Those institutions therefore answered the survey as many times as necessary.

## ARGENTINA

Centro Argentino de Información Científica y Tecnológica (CAICYT)  
Secretaría Técnica  
Moreno 431  
Buenos Aires  
Telex: 22414 CEDOC AR

Centro de Investigaciones Educativas (CIEDOC)  
Centro de Documentación  
Zabala 2677  
Buenos Aires  
Dirección postal: 1426

Centro de Documentación Municipal (CEDOM)  
Procesos Técnicos  
Perú 130  
Buenos Aires  
Dirección postal: PERU 130 1067 CAP. FED.

Hidroeléctrica Nordpatagónica S.A. (HIDRONOR S.A.)  
Centro de Documentación  
H. Irigoyen 379  
Cipolletti - Río Negro  
Dirección postal: 8324  
Telex: HINOR-AR 84116

Instituto Nacional de Tecnología Industrial. Centro  
de Investigación Documentaria (INTI.CID)  
Leandro Alem 1067  
1001 Buenos Aires  
Dirección postal: Casilla de Correo 1359  
Dirección cablegráfica: INTIBAIRES  
Telex: 021859 INTIAR

Instituto Rosario de Investigaciones en Ciencias  
de la Educación (IRICE)  
Biblioteca  
Av. 27 de Febrero 210 bis  
Rosario  
Dirección postal: 2000 Rosario-Santa Fé

Instituto Torcuato Di Tella  
Biblioteca  
11 de Septiembre 2139  
Buenos Aires  
Dirección postal: 1428  
Dirección cablegráfica: INSTELLA

Universidad Nacional de Córdoba. Facultad de Ciencias  
Económicas (43 FCE)  
Biblioteca  
Ciudad Universitaria  
Córdoba  
Telex: 51822 BUCOR-AR

## BOLIVIA

Centro Nacional de Documentación Científica y Tecnológica  
Plaza del Obelisco s.n.  
La Paz  
Dirección postal: Casilla 3283

BRASIL

Universidade Federal Fluminense  
Núcleo de Documentacao  
Secao de Catalogacao e Classificacao  
Av. Bento Maria da Costa 115-A  
Niteroi, Estado de Rio de Janeiro  
Dirección postal: 1050

Empresa Brasileira de Planejamento de Transportes (GEIPOT)  
SAN, Bloco A, Quadra 3  
70040 Brasilia, DF  
Telex: (061) 1316

Fundacao Getúlio Vargas. Instituto de Documentacao (FGV/INDOC)  
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Praia de Botafogo 190 - 7o. andar  
22250 Rio de Janeiro

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Biblioteca "M.A. Teixeira de Freitas"  
Avenida Cáspar Libero 464 - 10o. andar  
Sao Paulo - Estado de Sao Paulo  
Dirección postal: Cx. Postal 8223  
Dirección cablegráfica: Estadistica  
Telex: (011) 31390 SEAD - BR

Instituto de Pesquisas Tecnológicas do Estado de Sao Paulo S/A (IPT)  
Centro de Documentacao da Div. Econ. Eng. Sistemas (CENDES)  
Cidade Universitaria - 05508  
Sao Paulo - S.P.  
Dirección postal: 7141  
Dirección cablegráfica: TECNINST  
Telex: (011) 22831 INPT BR

Instituto de Planejamento Económico e Social. Instituto de  
Planejamento (IPEA/IPLAN)  
Setor de Documentacao  
SBS - Ed. BNDE - 2o. andar  
Brasilia, DF  
Dirección postal: Caixa Postal 11-1264  
Telex: 611023

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Marechal Hermes - Centro Civico s/n  
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Telex: 0416007

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Catálogo Coletivo  
Goncalves Dias 2553  
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80000 Curitiba - Paraná

COLOMBIA

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Telex: 06-631

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Dirección cablegráfica: CAMCOMERCIO  
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Dirección postal: Apartado Aéreo 6319

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San José  
Telex: UNICORI

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Santiago  
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Santiago

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Santiago  
Dirección postal: Casilla 16496 Correo 9

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Avda. Angamos  
Antofagasta  
Dirección postal: Casilla 1280  
Telex: UNORT 225097

#### ECUADOR

Centro de Desarrollo Industrial del Ecuador (CENDES)  
División de Investigaciones Económicas  
Orellana 1715  
Quito  
Dirección postal: 2321  
Dirección cablegráfica: CENDES  
Telex 2350 ED

#### SAN SALVADOR

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Guatemala  
Dirección postal: 365  
Dirección cablegráfica: GUATEBANCO  
Telex: 5231 GUABAN-GU

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Económica (SEGEPLAN)  
Área de Información  
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Económica Centroamericana (SIECA)  
Centro de Documentación e Información (CDI)  
4a. Avenida, No. 10-25, Zona 14  
Guatemala  
Dirección postal: 1237  
Dirección cablegráfica: INTEGRACION

HONDURAS

Banco Centroamericano de Integración Económica (BCIE)  
Estudios Económicos y Programación General (PROG)  
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Dirección postal: 772  
Dirección cablegráfica: BANCADIE  
Telex: BANCADIE 1103

PARAGUAY

Centro Paraguayo de Estudios de Desarrollo Económico y  
Social (CEPADES)  
Biblioteca y Centro de Documentación  
Mcal. Estigarribia 1050  
Asunción  
Dirección postal: Casilla Correo 1189  
Dirección cablegráfica: CEPADES

PANAMA

Centro Información y Documentación del IFARHU (CIDI)  
Información Educativa  
Panamá, Zona 5  
Dirección postal: Apartado 6337

PERU

Asociación Latinoamericana de Instituciones Financieras de  
Desarrollo (ALIDE)  
Centro de Documentación (CEDOM)  
Avda. Paseo de la República 3211  
Lima  
Dirección postal: Apartado 3988  
Dirección cablegráfica: ALIDE  
Telex: 21037 PE ALIDE

Banco Minero del Perú (BMP)  
Biblioteca  
Garcilaso de la Vega 1472  
Lima

Centro de Documentación e Información Andina (C.D.I.)  
Biblioteca  
Av. Arenales 1863, Of. 202  
Lima  
Dirección postal: Casilla 4857 - Lima 100

COFIDE, S.A.  
Centro de Documentación e Información  
Lima

Consejo Nacional de Ciencia y Tecnológica (CONCYTEC)  
Centro Nacional de Documentación e Información  
Científica y Tecnológica  
Camilo Carrillo 114, 4o. piso  
Lima  
Dirección postal: 1984, Lima 100  
Telex: 25023

Escuela de Administración de Negocios para Graduados (ESAN)  
Centro de Documentación  
Lima 100  
Dirección postal: Apartado Postal 1846

Instituto de Investigación Tecnológica Industrial y de Normas (ITINTEC)  
Dirección de Información y Extensión  
División de Información  
Área de Adquisiciones y Procesos Técnicos  
Esq. Las Artes, Ir, Morelli, 2a. cuadra  
Lima  
Dirección postal: Apartado 1145  
Telex: ITINTEC 20496 PE

Universidad del Turabo (UT)  
Programa Graduado en Administración de Empresas  
Caguas  
Dirección postal: Apartado 1091

URUGUAY

Centro de Información y Estudios del Uruguay (CIESU)  
Centro de Documentación - Biblioteca  
Calle Paullier 1174  
Montevideo  
Dirección postal: 10587  
Dirección cablegráfica: CIESUMONT

Centro Interamericano de Investigación y Documentación  
sobre Formación Profesional (CINTERFOR)  
Servicio de Documentación e Información  
San José 1092  
Montevideo  
Dirección postal: Casilla de correo 1761  
Dirección cablegráfica: CINTERFOR  
Telex: CINFOR UY 6521

Ministerio de Economía y Finanzas del Uruguay  
Servicio de Información t Biblioteca  
Paraguay 1467, piso 3  
Montevideo

Ministerio de Transporte y Obras Públicas  
Centro de Documentación de las Reuniones de Ministros de  
Obras y Transportes de los Paises del Cono Sur  
Centro de Documentación y Biblioteca  
Rincón 561  
Montevideo

Universidad de la República  
Escuela Universitaria de Bibliotecología y  
Ciencias Afines "Ing. F.E. Capurro"  
Tristán Narvaja 1427  
Montevideo

Universidad de la República  
Facultad de Ciencias Económicas y de Administración  
Departamento de Documentación y Biblioteca  
Av. 18 de Julio 1824  
Montevideo  
Dirección postal: Casilla de correo 5052 A

VENEZUELA

Biblioteca Nacional  
Bolsa a San Francisco  
Caracas 101  
Dirección postal: Apartado 6525

Centro de Investigaciones en Ciencias Sociales (CISOR)  
Dpto. de Información para el Desarrollo Social  
Torre A Madrices, Edif. Juan XXIII, piso 1  
Caracas 1010  
Dirección postal: Apartado 5894

Centro Regional para la Educación Superior para  
América Latina y el Caribe (CRESALC)  
Servicio de Información y Documentación  
Av. Los Chorros cruce con calle Acueducto, Edif. Asovincar  
Caracas 1060  
Dirección postal: Apartado 62090 Chacao 1060  
Telex: 25554 VC

Consejo Nac. de Inv. Científicas y Tecnológicas (CONICIT)  
Biblioteca. Sección Procesos Técnicos  
Caracas  
Dirección postal: 70617  
Dirección cablegráfica: CONICIT  
Telex: 25205

Fundación para el Desarrollo de la Región Centro  
Occidental de Venezuela (FUDECO)  
Sistema de Información Regional  
Barquisimeto  
Dirección postal: Apartado 523  
Dirección cablegráfica: FUDECO  
Telex: 51314

Instituto de Estudios Superiores de Administración (IESA)  
Departamento de Procesos Técnicos  
Caracas  
Dirección postal: 1640  
Dirección cablegráfica: IESAVEN-Caracas  
Telex: 28381 IESA VC

## BARBADOS

Caribbean Development Bank (CDB)

Library

Wildey - St. Michael

Dirección postal: P.O. Box 408

Dirección cablegráfica: CARIBANK

Telex: 2287

University of the West Indies (UWI)

Main Library

Cave Hill, St. Michael

Dirección postal: P.O. Box 64, Bridgetown

Dirección cablegráfica: UNIVADOS BARBADOS

Telex: UNIVADOS WB 257

## CUBA

Biblioteca Nacional José Martí

Departamento de Procesos Técnicos

Ave. Independencia

Ciudad de La Habana

Centro de Información Científico-Técnica (CICT)

Biblioteca

20 de Mayo y Ayestarán

Ciudad de La Habana

Universidad de La Habana

Dirección de Información Científico-Técnica (DICT)

Procesos Técnicos

San Lázaro y L.

Ciudad de La Habana

## GUYANA

Caribbean Community Secretariat (CARICOM)

Information Documentation Section

Avenue of the Republic, 3rd. Floor, Bank of Guyana Building

Georgetown

Dirección postal: 3rd. Floor, Bank of Guyana Building

Dirección cablegráfica: CARIBSEC

Telex: 2263 Carisec GY

University of Guyana (UG)

Library

Turkeyen, Greater Georgetown

Dirección postal: P.O. Box 10-1110

Dirección cablegráfica: UNIGUY

## REP. DOMINICANA

Banco Central de la República Dominicana  
Biblioteca "Juan Pablo Duarte"  
Pedro Henríquez Ureña  
Santo Domingo  
Dirección postal: Apartado 1347  
Dirección cablegráfica: BANCENTRAL  
Telex: RCA-3264186, ITT-3460052

Instituto de Capacitación Tributaria (INCAT)  
Centro de Documentación Fiscal  
Pedro Henríquez Ureña esq. Federico Henríquez  
y Carvajal  
Santo Domingo  
Dirección postal: Apartado 20216

## ORGANISMOS REGIONALES E INTERNACIONALES

Centro Interamericano de Desarrollo de Archivos (CIDA)  
Escuela de Archivos  
Facultad de Filosofía. Universidad Nal. de Córdoba  
Hipólito Irigoyen 174  
Córdoba, Argentina  
Dirección postal: Código postal 5000

Comisión Económica para América Latina (CEPAL)  
Oficina en Brasilia  
Biblioteca  
SBS. Edificio Seguradoras, 14o. andar  
Brasilia, DF, Brasil  
Dirección postal: CEP. 70072/C. postal 04/0251

Economic Commission for Latin America (ECLA)  
Subregional Headquarter for the Caribbean  
Caribbean Documentation Centre  
Frederick Street 2  
Port of Spain, Trinidad and Tobago  
Dirección postal: P.O. Box 1113  
Dirección cablegráfica: ECLA Port of Spain  
Telex: 394

Facultad Latinoamericana de Ciencias Sociales (FLACSO)  
Programa Buenos Aires  
Biblioteca  
Federico Lacroze 2097  
Buenos Aires, Argentina  
Dirección postal: Casilla 145, Suc. 26  
Telex: 1218937 FLACSO AR

Facultad Latinoamericana de Ciencias Sociales (FLACSO)  
Programa Santiago  
Biblioteca  
Leopoldo Urrutia 1950  
Santiago, Chile  
Dirección postal: Casilla 3213 C. Central  
Dirección cablegráfica: FLACSO-Santiago  
Telex: 03490001 ITT-BTH-CZ

Facultad Latinoamericana de Ciencias Sociales (FLACSO)  
San José  
Centro de Documentación y Análisis  
San José, Costa Rica  
Dirección postal: 5429  
Telex: 2846-FLACSO-CR

Instituto de Cooperación Iberoamericana (ICI)  
Dirección de Cooperación Económica  
Avda. Reyes Católicos 4  
Madrid 3, España  
Telex: 42134

International Development Research Centre (IDRC)  
Information Sciences Division  
Queen Street 60  
Ottawa, Ontario, Canadá K1G 3H9  
Dirección postal: P.O. Box 8500  
Dirección cablegráfica: RECENTRE  
Telex: 053-3753

Centro Internacional de Investigaciones para el Desarrollo (CIID)  
Oficina Regional para la América Latina  
Biblioteca  
Calle 72 No. 5-83, piso 4  
Bogotá, Colombia  
Dirección postal: Apartado Aéreo 53016  
Dirección cablegráfica: RECENTRE  
Telex: 45366

