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INTERIM PROJECT EVALUATION: POLICY REFORM PROJECT
AID-BOLIVIA

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EXECUTIVE SUMMARY

This was an interim evaluation of UDAPE (Unidad de Análisis de Políticas Económicas--Economic Policy Analysis Unit) whose project purpose was to "develop a permanent capability within the Government of Bolivia to conduct policy analysis studies and to formulate policy options necessary to address macro-economic and sectoral development constraints." Based on the terms of reference and requests from UDAPE and its Board of Directors, the evaluation concentrated on two issues: UDAPE's role in the policy process and a series of managerial issues which might affect that role.

UDAPE'S ROLE IN THE POLICY PROCESS: A SUCCESS

At this point in its history, UDAPE is clearly an important factor in the policy process of Bolivia. There is virtual unanimity in this view from the interviews with Ministers, Under-secretaries, and other Government of Bolivia officials, interviews with representatives of international organizations, and from the documents which were examined. The policy context has been, and remains, quite fluid, and UDAPE has adjusted well to this.

At this point UDAPE provides a series of policy inputs: information; specific operational support for some ministries; advice to ministries on technical issues and policy alternatives; and longer term research on policy issues. Their efforts are highly regarded.

The two chief economic policy ministers were interviewed as were the Under-secretaries who constitute the Board of Directors of UDAPE. They were unanimous in their high regard for the UDAPE contribution to the policy process, and their main concern was that its continuation be assured. They all mentioned specific studies which had important influence in their particular policy area, though in the sectoral ministries the influence is only recent.

UDAPE continues to produce a large quantity of papers, and in the past many have had direct effect on particular policy initiatives. In preparation for the evaluation, the UDAPE executives went through 75% of their studies and classified them according to their effect. They also isolated three areas in which a series of smaller studies coalesced into a "pivotal study" which became a central input into policy. These studies benefitted from the on-going research effort and the overall sense of direction of UDAPE. The interviews and a detailed examination of six studies corroborated the UDAPE view. All but one of the six had a direct policy effect, and they were generally well-written and researched studies, indicating a generally high level of work.

UDAPE'S ROLE IN THE POLICY PROCESS: QUESTIONS

There are several questions which should be raised, however. First, has the work become too reactive and short term, putting out fires that certain officials are fighting? There has been a decline in the number of studies from a 1986-87 high of 148 to 103 in 1987-88, and analytical studies declined from 74 to 46. The share of studies in direct response to an external request has risen from 35% to 62%, with the Ministry of Planning and Coordination the major client. So a move back toward analytical studies may be important. Second, should UDAPE become more open with portions of its work; its distribution list for its work has become very narrow; thus it is insulated from different ideas and in a time of transition it may have no identity apart from the existing government. On this item, the Minister of Planning shared the concern and supported the idea of more frequent publications from UDAPE. Third, what will be UDAPE'S area of competence over time as other entities stabilize and develop their analytical capabilities? At this point the sectoral effort is an important one in this regard. The formation of the Board of Directors is one response to this problem, and despite the difficulties involved in making it function well, it seems to me to be the right strategy at this point.

UDAPE'S MANAGEMENT: THREE SUCCESSES

The development of an active and capable analytical team has been the major success. There has been high turnover among the UDAPE analysts, but the new members have been very experienced and quite capable, and the teamwork process at UDAPE has allowed their integration with little difficulty. Most indicators are that short term technical assistance has generally been well-managed, and even a strong critic of UDAPE gave it generally high marks for its effectiveness. The nature of technical assistance in Bolivia today suggests a careful approach in UDAPE.

The final "managerial" success has been UDAPE's ability to operate quite successfully in the political environment of today's Bolivia. This is reflected in the number of organizations asking for UDAPE assistance and in the number of requests to which UDAPE is now responding.

UDAPE'S MANAGEMENT: QUESTIONS

The central question is whether the Consejo Directivo of UDAPE will function well in orienting UDAPE's work and assuring it a continued role within the public sector. The Minister of Planning felt it was the correct strategy and that it would work well because "the people involved work well together."

A second issue is whether priorities are well-established in UDAPE at this time or if they are simply reactive. This relates to the concerns on analytical studies

and whether UDAPE may be living off the capital developed in the past.

Finally, there are questions about the internal management, the stability of the organizational structure, and the delegation of authority. The structure has been quite fluid in the past, and only recently have two division heads been put firmly into place under a new organization and the trajectory of the sectoral analysis division remains unclear. In the past there does not appear to have been effective delegation of authority which resulted in a decline in the monitoring of projects. These internal management questions suggest a new administrative structure in UDAPE.

SUGGESTED ADJUSTMENTS BASED ON EVALUATION

Based on the evaluation, five adjustments should be made in the UDAPE operation.

1. The Board of Directors is very important to UDAPE at this point, and it can play an important role in developing the contacts with the sectoral ministries, providing guidance for the UDAPE studies, and encouraging and supporting more "applied research." The Board of Directors should be made to work, using all mechanisms available, a number of which are suggested in the evaluation.

2. The division heads, the Executive Director, and ideally the long term technical assistance adviser, should constitute a true executive committee of UDAPE with real sharing of authority among them, under the leadership of the Executive Director. The tasks of analysis, external contact, and internal management are quite heavy at this point, given UDAPE's prominence, so they should be shared out. This will also provide a firmer managerial base in a time of likely transition in Bolivia. This committee and its functions should be incorporated into the internal organizational statutes of UDAPE.

3. A series of steps should be taken, managerial adjustments made, and incentives provided for undertaking more analytical and longer-term studies of an applied research nature. The exact definition of these studies is unclear from the interviews, ranging from "think tank" to "applied research" definitions. At this point it is less important to define them than to take steps to ensure that more analytical work is supported. The Board of Directors and the Executive Committee of UDAPE should ensure that the balance of studies is shifted in this direction,

4. An effort should be made to undertake longer term research planning. As a first step, the long term technical adviser should undertake such an effort in coordination with the rest of UDAPE. A second step would be to develop, every semester, two or three diagrams of "pivotal studies" which can give an indication of the general direction of the research. Another possibility which should be explored is the formation of a unit within UDAPE, most probably with

additional PhD personnel, to undertake this long term thinking and research. It would in some sense be a "think tank" within UDAPE.

5. The mode in which short-term technical assistance is used should be continued and amplified. It has worked relatively well to this point and the major problem may be that the amount of technical assistance which is available in Bolivia at this point makes any technical assistance a less valuable commodity. Nonetheless, there should be ample role in developing the analytical capacity of UDAPE and in supporting sectoral efforts which can benefit from technical assistance.

The evaluation includes a series of ten Annexes which contain much of the information on which the conclusions are based.

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DESCRIPTION OF THE EVALUATION

INTRODUCTION

The amended Policy Reform Project Paper signed on April 9, 1986, called for this external evaluation in 1987-88 to measure the progress toward the project purpose. The utility of the evaluation at this point is threefold:

a. To provide a mid-project external perspective on the progress of the project which may bring to light aspects which may benefit from rethinking.

b. To stimulate an internal examination of the project and a consideration of modifications that might be beneficial as it moves toward completion.

c. To provide an initial pass at the type of evaluation that will be carried out at the termination of the project, in the process perhaps facilitating that effort.

It should be noted that the executive staff at UDAPE was extremely responsive in all areas. In particular they spent the time to go back over their studies to attempt an evaluation of their policy impact, and perhaps even more importantly, to think through the process of policy analysis and development. The Executive Director also provided me access to major players in the policy process in Bolivia, most importantly the two key economic ministers, Finance and Planning and Coordination.

I should mention that I evaluated the same project three years ago, at a much earlier stage in its development. I

offer my personal reactions to the changes over this period in Annex 8. My familiarity with the project and consequent ability to see the directions it had moved and its possible future directions certainly facilitated the evaluation.

The specific tasks of the evaluation are most clearly stated in the terms of reference drafted by the Office of Development Planning and Evaluation of AID/Bolivia(Annex 1). In addition, certain other requests were made by the executive staff of UDAPE, and the Consejo Directivo of UDAPE proposed that the evaluation examine "the objectives and goals of UDAPE in light of the requirements and necessities of the government and its implementation with the state institutions and authorities." These specific requests are dealt with in the actual evaluation.

The various issues can be summed into the two principal questions listed below, and so my time between July 7 and July 28, 1988, was spent in dealing with these two issues.

TWO KEY QUESTIONS OF EVALUATION

The central issue of the evaluation is whether UDAPE's analyses and policy options have been used by its clients in the Government of Bolivia. This quite correctly goes beyond the initial purpose of the project which was to "develop a permanent capability within the Government of Bolivia to conduct policy analysis studies and to formulate policy options necessary to address macro-economic and sectoral devel-

opment constraints." At this point in the evolution of UDAPE, the capability is less in question than the effectiveness with which that capability is marshalled. A review of the Logical Framework of the Amended Project indicates that this will be the key issue in the final evaluation's assessment of the project purpose and the project outputs, and thus information which can be provided at this time will be doubly useful.

The second key question concerns the management of UDAPE and how that contributes to the policy analysis effort. There are a number of elements to this question: the manner in which work is accepted, scheduled, and completed; the operation of the Consejo Directivo and the role it can play in UDAPE's efforts; the use of short term technical assistance; the professional development process within UDAPE; and the process by which new staff are assimilated to the work of UDAPE. At issue in each case is the actual practice and whether there can be improvements.

The efforts of the evaluator focused on providing answers to these two central questions, with an eye to aiding the actual performance of UDAPE and looking ahead to its future.

Neither of the questions posed in the evaluation lends itself to neat and crisp quantitative assessments. What quantitative information was available and relevant was used, and it is either presented in the Annexes or is referred to

in the body of the evaluation. Since much of the data must be qualitative, the approach was to gather information from all relevant sources, and then to blend it together into an overall evaluation of UDAPE's performance in the policy process and on managerial issues.

POLICY CONTEXT

It is important to realize that "developing policy options" has very different meanings in different contexts, and has certainly changed over recent years in Bolivia. In the early period of UDAPE, it meant the development of policies which would totally reorient the economy and make dramatic changes in a given policy area. This was the "Sachs model" which was pioneered in the late 1950s by the famous Klein-Sachs missions to many Latin American countries in which whole new policy approaches were developed; and of course the 1985 period saw a different Sachs in operation, without his Klein.

In 1988, there are still some areas which could undergo significant restructuring, but for the most part the problem of policy development is much less grandiose, having to do with a slight change in exchange rate policy here, or the possible reorganization of an economic entity there. The IMF is now much more important than Sachs in the policy arena, and the IMF thrives on very detailed technical issues related to its policy package.

In addition, there is now a greater stability in the government of Bolivia, and so different ministries increasingly will be able to undertake their own operations effectively and may develop analytical capabilities over time. At this point the ministries have access to ample technical assistance, so this no longer gives UDAPE such an advantage. And some new operational entities have been established, such as SAFCO, which have taken over areas in which UDAPE was working. While there is unanimity of opinion that UDAPE at this point has a virtual monopoly on significant analytical capacity, there will be increased competition for the type of work which UDAPE does. This will continually raise the issue of UDAPE's proper area of competence, its turf.

This points to another reality. UDAPE's main client is the Government of Bolivia, in particular the economic ministries. However, there is another very important client, the international institutions, the IMF, the World Bank, AID, and the IDB. In some cases their call on UDAPE is direct, as when the World Bank asks UDAPE for fundamental information to be used in writing a country report, or when the IMF calls UDAPE about a particular statistic. In other cases it is indirect, when the government must convince the IMF that it is abiding by the performance measures agreed upon, or when a given minister has to make a speech at the Consultative Group or the UN and UDAPE writes the basic speech. But this is part

of the policy context, given the importance of these agencies for the stability of the Bolivian economy.

It is against this background that UDAPE's role in the policy arena must be evaluated.

EVALUATION NARRATIVE

GENERAL CONCLUSIONS

A great deal of information on UDAPE was gathered, some quantitative, much qualitative, and it provides a mosaic of UDAPE's performance. The core of the evaluation is this narrative, dealing with the issues raised in the terms of reference. Specific pieces of information will be referred to where appropriate, but for the most part the information is simply presented in the Annexes for any detail that a particular reader may wish.

One conclusion is undeniable. UDAPE has played, and continues to play, an important role in the policy development and policy implementation process in Bolivia. There is virtual unanimity on this account from all sources of information: the interviews with GOB officials from Ministers through Under-secretaries (See Annex 2 for a complete list of persons interviewed as part of the evaluation); from interviews with external organization representatives; from the documentation collected at UDAPE; and from the actual government decrees and laws. The very success of UDAPE in this regard may begin to cause it some

problems which could become serious in the future as it is called upon ever more heavily to support under-secretaries on particular issues. But at present its role is certainly significant.

This role would not be possible if there were not significant areas of excellent management in UDAPE, perhaps the most important of which is in personnel matters. There has been a large turnover in analytical personnel--and very little in administrative personnel--but the average level of the present core of professionals has probably increased. And this trajectory will continue given the advanced education being offered to UDAPE personnel.

Another undeniable success in the broad "management" area has been the ability to operate in the political sphere and to gain or maintain access to the policy-making process. Technical expertise aids in this effort, but maintenance of political contacts is central.

These general observations do not mean that there are no issues, questions, problems in these two areas. But they should not detract from what has become a very important institution in Bolivia. In part this is because of the particular approach which UDAPE has taken to policy development, what I call "the UDAPE model."

THE UDAPE MODEL

In its most successful efforts toward operating in the

policy arena, UDAPE has used a six-step process.

1. Selection of a problem with wide ramifications: in the early years, the macroeconomic issues were many and so it was relatively easy to do this. At present it is more difficult, as UDAPE relies very heavily on the Ministries for the definition of problems. But it can still be done.

2. Development of a data base: this is the undeniable success of UDAPE, as attested by the magnetism it has for international technicians. On crucial issues, UDAPE has the best data base in the country: the most extensive series; extreme care in their consistency and definition; and readily accessible first on diskettes and now on the information system developed by their computer specialists.

3. Realization of a number of studies which deal with portions of the broader issue, often based on a particular formal model which can readily isolate key elements of the problem. These are the "research" efforts which I feel are at the base of UDAPE's ability to provide policy advice.

4. Consolidation of these studies into a "pivotal study" which has often had a major effect in the policy arena (See the "Summary of UDAPE Studies," Annex 3, especially the diagrams).

5. Maintenance of the data, the models and their outputs, and more importantly of the skills and knowledge of the analysts.

6. Continuation of a policy input based on the technical

resources developed, often in the form of fire-fighting for ministries with particular problems.

Part of the question about UDAPE is whether this process continues or whether UDAPE is essentially living off its earlier accomplishments and operating at step 6. In two cases, the energy sector models and the Computable General Equilibrium Model, the former is clearly the case; but there is a question of balance.

Let us turn to the specifics of the two main areas of concern in the evaluation.

UDAPE'S ROLE IN THE POLICY PROCESS: A SUCCESS

Even its severest critics will not deny that UDAPE has played a significant role in the policy process in Bolivia since its inception. It is respected, has developed a stable and impressive base of technical data and of competent technicians, has played a major role in a number of important economic decisions, and has provided specific technical advice in a number of important areas. The capability for policy analysis clearly exists, and has been used extensively and successfully in the economic policy-making process.

Interview Information

The interviews both inside and outside the government were virtually unanimous as to UDAPE's success. In contrast with the interviews which I carried out three years ago, when

the representatives of the international organizations had little sense of UDAPE, the resident representatives of international institutions now agree that UDAPE is the organization they rely on if they need information, whose analyses they respect, and which has been highly successful in bringing a number of issues and policies into clearer focus. Only the World Bank staff I talked to had little sense of UDAPE, but that was because they were both new to Bolivia. Even in their case, the basic data for their study of the fiscal situation of the country were to be provided by UDAPE.

I held interviews with two Ministers, five Undersecretaries, and several other government officials. All of the Bolivian government officials can cite specific incidents when the UDAPE input was crucial in understanding a particular issue, developing policy alternatives, and reaching some agreement on a policy.

There are four kinds of contributions UDAPE makes:

a. Data: UDAPE has the best macroeconomic information system in the country, and so when a policy relies on information, the UDAPE information system will be tapped, or UDAPE will be asked to gather the data necessary. Recent examples are the World Bank's request for extensive historical fiscal data, and the studies of the social security system and of small industry where UDAPE's skills were called upon to provide the information base, often in conjunction with the National Statistics Institute. There is

a desire to shift more of the statistical work to the INE; but the INE budget and staff are not fully capable of taking the load.

b. Specific operational support: in a number of cases, specific operations which should have been performed by a ministry simply were not being done, and UDAPE was called upon to step in and eventually to facilitate the activity. Perhaps the best example is the accounting system at the National Treasury(TGN). UDAPE had begun to develop an accounting of government revenues to allow them to track the fiscal deficit, and they finally develop a micro-based system of accounting, using dBASEIII, which could give an accurate accounting for their purposes. They subsequently trained the personnel at TGN to use the system and it is now in operation at the TGN. Lic. Ramiro Ortega, Under-secretary of the Treasury, made a point of showing me the results of the project during my interview with him. It will be interesting to see if the UN-AID SAFCO project, designed to improve the public administration, reinvents this system or draws upon it in developing their accounting system. A number of basic data-gathering efforts, now primarily with the National Statistics Institute(INE), are other examples of specific collaboration with another entity. These are carried out under "matrix" agreements which allow temporary support for INE technicians and whose effect is to raise the technical capacity at INE while developing the data base.

c. Advice on particular technical issues: ministries often have a specific problem in need of an analytical answer, and UDAPE is often called upon to provide it. This is the "fire-fighting" component of UDAPE activities which seems to have become more prominent recently, and which is in some sense a measure of UDAPE's success and credibility. Just in the time I was in UDAPE there were urgent calls for help on issues ranging from the fulfillment of the goals of the IMF agreement to the effect on government revenues of de-indexing the price of hydrocarbons.

d. Seminal work in a policy area: there are a number of cases in which UDAPE's research base allowed them to have an important input in a particular policy area, providing the basic inputs for what came to be major policy decisions by the government. Certainly the Reforma Tributaria (Tax Reform) was one of these, as was the work on the Fondo Social de Emergencia (Social Emergency Fund) and the Plan de Reactivacion (Reactivation Plan). They also laid the basis for tracking the Programa Financiero (Financial Program) with the IMF and for monitoring the state enterprises. In all of these cases the ongoing research effort of UDAPE allowed them to have an effect when policy finally moved in a particular area.

This success was captured in the interviews, perhaps most impressively in the interview with Gonzalo Sanchez de Losada, Minister of Planning and Coordination. He is highly

supportive of UDAPE, indicating that it has become the eyes and ears of policy-makers who are too busy with fighting fires. Most of AID's programs such as Food for Peace, he sees bureaucratically as he signs documents. With UDAPE he sees the actual results continually. He especially highlighted UDAPE's role in the negotiations with the IMF which, he said, often does terrible things. Because of UDAPE's efforts, Bolivia was able to go with their own figures and slug it out for three weeks with the Fund. We touched on many of the other issues which will appear later in this evaluation, and his perception and mine were remarkably similar, as will be noted. His willingness to see me and to discuss UDAPE for forty minutes in the midst of a very busy day is another clear indicator of the importance he places on UDAPE and on the Executive Director, Gonzalo Afcha.

The success of UDAPE is also seen in the documentary record.

Documentary Information

The most complete documentary information has been compiled by UDAPE and is included in the Annex 3 as "Summary of UDAPE Studies." As an aid in this evaluation, the UDAPE executives examined about 75% of their studies and categorized them according to their effectiveness in the policy realm. I checked a number of these categorizations in my interviews, and they appeared correct. They also specified in the three diagrams included how a given study which had an

impact depended upon a series of additional baseline studies and methodological developments, i.e. it depended heavily upon the ongoing research program. These diagrams provide an exceptional insight into successful policy development efforts. Finally, I received a complete list of the studies, including the source of the request for a particular study, upon which I based my work on the Tables in Annex 3.

My summaries of the UDAPE studies provide a tangible assessment of their direction and accomplishments. First of all, the volume of material produced increased over the life of the project, though it has fallen somewhat during the past year. In terms of the number of studies, UDAPE will so far exceed the targets of the project that that measure of success becomes a given. In addition there has been a shift away from the statistical studies that were done in the early years to more analytical studies, though again there was a decline in numbers and percentage of analytical studies this past year. Even more importantly, the clientele for UDAPE studies has notably increased. In 1987 there were 11 institutions and this year there have already been requests from 8 institutions. The Ministry of Planning and Coordination is the largest user of UDAPE studies, 35% of the requests in 1987 and 56% thus far in 1988. One significant change in 1988 has been the increase in the share of studies done for specific requests, rising from 35% to 62%(from a low of 7% in 1985). This is a tribute to UDAPE's

importance in the policy process, but as we will note later, it has some implications to be examined.

The final element of the documentary information is the six studies which were chosen for special attention. They are listed and discussed in Annex 4. They were chosen to provide coverage of each of the Ministries which form part of the Consejo Directive of UDAPE, and to include studies done by national and international consultants, as well as in-house studies. They are studies that UDAPE feels had an impact.

The six studies run the gamut of analytical sophistication, from the electricity study which is highly mathematical and model-based to the industry and agrarian bank studies which are very discursive. The tax reform and financial program studies draw heavily upon the analytical base which UDAPE has developed, indeed actually using many of them as chapters. The Recovery Plan memo was certainly useful in sorting through the rather confusing landscape of Bolivia at that time. So in general the papers are competent and well-done, though only the electricity paper would be considered high-powered. This balance may again indicate the value of moving toward more analytical research work.

They clearly had an impact on policy. Many of the agrarian bank study's suggestions were incorporated in the Reactivation Decree in the section on the agrarian bank. The actual recovery plan took almost as guidelines many of the suggestions in that paper. The tax reform clearly reflected

many of the suggestions of that paper. UDAPE set the tone for dealing with the IMF with the financial program paper. And if there are changes made in electricity distribution, they will probably come from that paper. Only in the case of the industry paper is the link to policy unclear, though the Under-secretary of Industry indicated that it was an important input in their thinking.

Thus my reading of the papers in terms of quality and effect in the policy arena is favorable.

This does not mean that there are no questions about UDAPE's role, however.

UDAPE'S ROLE IN THE POLICY PROCESS: QUESTIONS

The measure of success in a policy analysis project is the demand for the product. UDAPE is clearly successful, though this carries with it certain additional problems. Everything indicates that more and more time in UDAPE is being spent fighting fires, responding to specific requests of Ministers or of under-secretaries who need an analytical input to a particular problem. This is reflected in the decline in the number of studies which were completed from the 1986-87 high of 148 to 1987-88's 103, and the notable decline in analytical studies from 74 to 46. This may also account for the complaint of the short-term technical assistance advisers that they were not able to work closely enough with their counterpart who had many additional tasks.

Should UDAPE be doing more research that would prepare them to have input in new policy issues as they arrive? I think they should, though one might make the case that their responses on particular issues are significant contributions to policy at this point. The Consejo Directive seems to agree with my observation, at least in theory. The minutes of their June 1988 meeting state that UDAPE should be "a center of research and analysis of economic problems and should propose economic policies relevant to each field, consistent with the economic policy of the government."

However it is difficult to define exactly what these analytical efforts should be. Based on the interviews, they should not be "academic" and UDAPE should not become a "graduate school." The person who seemed least concerned about this question was the Minister of Planning and Coordination. They should be "research," and they should have a medium to long run perspective. They should be "applied research," and should allow UDAPE to be a "Think Tank," a term used by Under-secretary of Economic Policy, Fernando Candia, to come up with alternative policy prescriptions. Given the looseness of the concept, I believe it is better to begin to take concrete steps, listed in the Suggested Modifications section, toward more analytical efforts by UDAPE, and to define this new research effort in actual practice.

A second question has to do with how "open" UDAPE should

be with its work. In recent years, partly in response to external criticisms which threatened the very existence of the unit, their studies have become much less accessible. Particular memoranda go only to the Minister or Undersecretary who requested them; the analytical studies have a very restricted circulation; and the new Conjunctural studies will initially go only to the members of the Consejo Directivo for transmission to CONEPLAN. This has a number of detrimental effects. First, the UDAPE research agenda will have a tendency to be reactive to the demands of the government, and thus to lose its ability to anticipate issues which would arrive in the future. Second, UDAPE should provide policy alternatives, but a closed approach makes it less likely that any options outside of the range of acceptability to this government at this time will be considered. A different government might adopt different policies, as might this government at a different time. This dimension is again lost. Finally, UDAPE runs the risk of moving too far toward being an operational arm of the government rather than a technical unit whose analyses can provide better bases for decisions, no matter which government is in power. Thus should UDAPE "open" up more, as it will be forced to when the new election season arrives? I feel that it should, and on his own initiative Ministro Sanchez de Losada suggested that he would like to see more publication from UDAPE, he thought perhaps a compilation

every four months of their analytical work. There will always be studies that are correctly confidential, but there is a significant amount of neutral information and analysis that could usefully be published more widely.

The third question has to do with the area of competence of UDAPE, i.e. what area of policy development could or should UDAPE dominate. Their strong point has been macroeconomic analysis, but their dominance is being disputed by the Central Bank and by the Ministry of Finance. They had started work on public enterprises, but that has been taken over by another government entity, SAFCO, and as a result UDAPE may have some problems obtaining information on state enterprises. They did work on the national budget, but much of that has passed over to Ministry of Finance. They started tracking the IMF Financial Program, but that has been taken by the Ministry of Finance, with UDAPE playing a first among equals role in the effort. Elements of their statistical operation are passing to the INE. In part this is a problem of the organization of UDAPE, and the absence of a true line role in the government. If they were the technical advisers of the Minister of Planning, the question would not be so pressing. (This was suggested as one solution by Undersecretary Candia, and Finance Minister Juan Cariaga suggested that UDAPE would be better placed in his Ministry. Minister Sanchez de Losada indicated that this issue had been raised, and apparently the Central Bank would also like to absorb

UDAPE). Otherwise they will have to continue developing areas of expertise--and that of course will require more analytical studies, consistent with the observations above. This raises the organization question as to whether the Board of Directors can assure UDAPE an area of competence. That will be dealt with below. It also highlights the sectoral studies area, and whether this will be a viable area of concentration. I specifically asked Planning and Coordination Minister Sanchez de Losada if he supported this effort, and he indicated that he did, because it was often important to be able to take an independent stance in dealing with the sectoral entities.

UDAPE'S MANAGEMENT: THREE SUCCESSES

UDAPE would not be successful in the policy arena if there were not a firm managerial base. So in one sense this issue is answered by the success in the policy area. But what are the successful managerial areas?

Probably the area of greatest success is personnel. UDAPE functions as a team, and the players on the team are generally of high competence, high energy, and committed to the work which UDAPE does. The support staff have remained fairly stable over the life of the project, and there has been a clear development in their capacities. They are all at ease with the micro-computers for both word processing and spreadsheet operations. They operate easily in the

information system environment. Although I have not done extensive interviews with short-term consultants, all indications are that their support from the staff has been excellent and has facilitated their work.

The technical staff has been much less stable. There has been an increase over the last three years from roughly 9 to 12 analysts, and only three of the 12 were among the analysts of three years ago. In addition, one of the executives was an analyst. Such rapid turnover would seem likely to interfere with the operation of the unit, but there is no indication of this. Indeed the new hires seem uniquely capable, and many had extensive previous experience in the areas they are working in with UDAPE. The reason most gave for leaving their previous work, in addition to the pay, was the opportunity to do analysis rather than simply operational work.

One concern of the UDAPE executives was the manner of integrating new technical staff. With few exceptions, primarily those with temporary contracts rather than in permanent positions, the analysts felt there was little difficulty in the transition. The key seems to be to put them into a group to work on a particular project so they can learn-by-doing from the other members of the group.

In addition, the formal qualifications of the analysts have improved, and will continue to improve as four who are on leave return with Masters Degrees. At that point a Masters degree will effectively be a requirement for

analysts.

There are also strengths in the management of the short term technical assistance, though this varies from project to project. The information I have is not as strong as I would like, but two mornings spent trying to make telephone contact with several of the short-term advisors were frustrated by the Bolivian telephone system. There appear to be no complaints about UDAPE's responsiveness to requests for data collection. One mode of operating (the preferred) is for the consultant to come in for a short visit, to define the terms of reference jointly, and then for UDAPE to gather the information required for the analysis which is carried out on a subsequent, longer visit. This appears to work well.

In addition, UDAPE has gained confidence in finding a group of consultants it can work with. For example, the consultants on the energy project came from contacts the analyst had in Argentina. This strikes me as a valuable maturation that will aid UDAPE in the future, especially when the technical assistance component of the project ends.

There is one other piece of information which I include simply because it surprised me. Over the previous year, one of UDAPE's strongest critics was the HIID long-term technical assistance adviser. That issue is appropriately outside the concerns of this evaluation. However in a final memo, even he painted a rather positive picture of UDAPE's use of technical assistance. He gave seven "A" marks for the benefit of a

particular technical assistance effort to the government of Bolivia, one B, and three F's (one of which I know is too low a grade). In terms of UDAPE's benefit, there were five A's, three B's, one C and two D's.

The future use of short-term technical assistance will be affected by what someone termed "a war of technical assistance." From being a scarce commodity three years ago, there is no shortage at this point. And Under-secretary Candia indicated that the AID daily rate could not bring the best, giving the example of Devarajan who is "only a junior person." I believe that technical assistance can still be useful, first in aiding UDAPE to strengthen its analytical capabilities, and second in the sectoral ministries where neither the price nor the quantity of technical assistance is likely to be as great as in the Planning Ministry.

The third and clearly one of the most important "managerial" successes has been UDAPE's, and the Executive Director's, ability to weather the political storms of the last three years and to establish direct access to the key economic policy-makers. At one point in 1985, there were suggestions that UDAPE be abolished for political reasons. That stance would be inconceivable today. This is clearly a delicate and time-consuming task that has been accomplished with virtuosity.

These managerial elements have contributed to the success in the policy area which UDAPE has enjoyed. There are

some very real questions about management which should be addressed, however.

UDAPE'S MANAGEMENT: QUESTIONS

The key question is whether the Board of Directors can be made to function. The link with the clients, the process of accepting work, has been unstable over the life of the project, and probably not to the benefit of the unit. UDAPE initially was an integral component of CONEPLAN, the Council of Economic Ministers. But when CONEPLAN began to function less effectively than the Ministry of Planning, UDAPE naturally moved back to being a de facto dependency of the Minister of Planning, and as his workload increased, of the Under-secretary of Economic Policy. With the sectoral emphasis which UDAPE correctly has taken, this is not a satisfactory arrangement, and it does depend on the caliber of the Under-secretary who at this point is quite good. As a result the Board of Directors, which includes the Under-secretaries of five of the economic ministries, has been reactivated. They have taken a number of interesting steps, e.g. asking UDAPE to begin to do the conjunctural monitoring again and suggesting that the studies have more of a long-run perspective. These are certainly steps in the direction UDAPE should go. It remains to be seen whether the Board will actually back the efforts to move in this direction and whether it will be a viable mechanism to guide UDAPE efforts.

The Board has the potential to place UDAPE in the center of a whole series of policy issues where the unit's analytical and data management skills can be well-used. On the other hand, it could end up simply increasing the demands on UDAPE for short term studies, overloading a system which is already heavily used. My own estimate is that working with the Board is the correct strategy for UDAPE at this point. It has the potential for solidifying the sectoral element that is likely to be UDAPE's growth area in the next year. It can play an important role in priority setting. And the alternative of becoming a line operation in a ministry could potentially damage UDAPE if that ministry were marginal to policy-making in the government that will take power in August 1989.

This relates to the second major concern, the nature of priority-setting in UDAPE. At this point the pendulum seems to have swung too far toward taking requests from ministries, and often of a very momentary "fire-fighting" sort. There will be real costs to this over time, and so thought and effort should be given to ensuring that these efforts do not take such prominence.

A third issue has to do with the internal organization of the unit. The internal organizational structure of the office has been changed three times. The first reflected the blurring of the division between statistical technicians and analysts as the statistical base firmed up. The more recent,

within the past month, reflects the need to balance the short-term macro efforts with the sectoral and longer term efforts, and to develop a managerial team. The two most recent organizational charts are included in Annex 5. The reorganization strikes me as logical; however, the instability and its effect on the work of the unit is a concern. It is not clear how the sectoral analysis division will develop over time. Their tasks seem to overlap with the macro division, and the direction they will take is not clear. The one exception is in the energy area, where the electricity study and the hydrocarbon study appear to provide the basis for a coordinated look at the energy area, phasing in macroeconomic considerations. In the other cases there is much less clarity.

This is certainly the area where UDAPE's competence can be well-used and where there is potential for development. It took three years to establish the solid base in macroeconomics; the challenge is to do the same in key sectoral areas in a much shorter time period.

The process of monitoring the progress of studies does not seem to have operated, formally, during the past year. And this is a matter of concern. Within the last two months UDAPE put in place an extensive process of monitoring the tasks that have been selected. There have been a variety of approaches to this issue, over the life of the project. At this point the system seems quite good and an example is

included in Annex 6. The present system seems effective in ensuring that responsibility for completing work is clear. There are real deadlines which often call forth exceptional efforts on the part of the analysts and support staff (who are required to be available evenings and weekends on a rotating basis).

These internal issues revolve around one central concern. At least at this juncture, there is very little real delegation of responsibility for setting the direction of studies and in other areas of work. It is also not clear that the two division heads can protect their staff and ensure them the time necessary to do the kind of detailed research which will be necessary over time. The use of the long term technical advisor is an analogous case. It is important at this juncture to formally establish an executive committee of UDAPE to ensure a division of the heavy workload and to deal with the internal managerial slack that may have existed in the last year. The executive director should head and lead the committee, and its other members should be the two division heads and the long term technical adviser.

SUGGESTED ADJUSTMENTS BASED ON EVALUATION

From the above analysis, a number of modifications to the UDAPE operation should be made:

1. The Board of Directors (Consejo Directivo) is the right strategy at this point to provide UDAPE with a sectoral

element, to provide direction in the analytical area, and to act as a buffer to allow more of a longer term perspective. It is the wrong time for UDAPE to be moved into a line position within a ministry. The success of the Board in these areas is not assured and every effort should be made to make the Board of Directors operate. There is a good deal of skepticism about it at this point, but this broad range of contacts and set of clients can be very important for UDAPE's continued vitality. This is especially true with the sectoral emphasis which now accompanies the traditional macroeconomic orientation.

The Board should be convinced of its importance and given every aid in its work. Among steps which might be supportive of this effort are:

--provision of a more formal recognition of the Board perhaps by the various Ministers, the head of AID, or a similarly influential personage, and ideally with an event attached such as a special luncheon.

--provision of a specially tailored publication provided to the members at the meetings, probably the Monthly Conjunctural study, with encouragement to discuss the issues raised there

--selection of a particularly crucial issue for a presentation by an important external authority or by the relevant UDAPE analyst. This can be an opportunity to showcase the kind of analysis that UDAPE can do and gradually

to convince the members that such efforts should be supported, even in preference to "fire-fighting."

--encouragement to the group to consider these issues and to become a kind of economic sub-cabinet where issues are anticipated and discussed.

--provision of special publications to the members which might be of special interest to them.

--continual contact with the Sub-secretaries on areas of collaboration, especially in the early phases of operation.

--assurance to the members that the decisions taken and the studies suggested will receive a prompt response.

2. The internal problems of unstable and organization and of delegation of authority should be dealt with by constituting an "Executive Committee" to handle the main managerial tasks of UDAPE: the external contacts about potential or requested analyses, the assignment of work, its monitoring and quality control, and the long term planning for the unit. The Executive Committee should also make the assignment of priorities to the various studies and important component of its efforts. The division heads, along with the executive director, and under ideal circumstances the long-term technical adviser, should constitute the Executive Committee of UDAPE. This should be incorporated in the internal organization statutes of UDAPE and the roles of Executive Director, Division Heads, and Long Term Technical Adviser should be clearly delineated. The Executive

Committee members should be introduced to the Consejo Directivo to facilitate their contacts with them.

3. These two organizational changes should facilitate the shift in emphasis toward studies of a more analytical nature. More emphasis should be given to analytical studies which do not have an immediate payoff, but which may eventually become part of a "pivotal" study. Again there is no clarity on how to describe these studies: research, applied research, non-academic research, think tank research. So rather than try to define such studies, it is more sensible to take steps and provide incentives to move in the direction of more analytical efforts. There are a number of ways that reaching this balance can be encouraged, and both the Board of Directors and the Executive Committee can contribute.

--there should be more emphasis placed on publication and dissemination, including the publication of more numbers of Análisis Económico. Certainly another issue of the journal should appear this year. The models, the historical studies, and some of the analytical studies of broad issues would lend themselves to this outlet. This would both recognize and encourage the effort to develop "policy alternatives." The Minister of Planning is in favor of this effort, and would like to see publications every four months.

--analysts on particular studies should be more protected from short-term demands. Perhaps every month a

particularly important study can be singled out and the person working on it be given some protection from other demands. This will become more feasible as the effort of the Division Chiefs to acquaint two or three people with a particular area moves forward. The example last month would have been the Computable General Equilibrium Model which has been held up by other demands.

--UDAPE should become more open, striving to disseminate the studies more widely. This will of necessity place more emphasis on the technical, rather than the specific policy studies. The journal is one mechanism and simply broadening the mailing list for analytical studies would also contribute. It must be emphasized that there will still be many UDAPE studies and memoranda that appropriately will be held confidential.

--UDAPE contact with outside research organizations and meetings should be encouraged, for this will again broaden the analytical perspective. They have had contacts with PREALC, ILDIS, the World Bank, and CEPAL, and these contacts should be facilitated and appreciated.

4. The shift toward analytical studies and clearer priority setting can be aided by an effort at long term research planning, say a year in advance. While this is an art and there will clearly be slippage between plan and actuality, the discipline would be quite useful at this point. There are two intermediate steps which could be taken,

and thought should be given to an organizational change which could facilitate the effort.

--the first step would be to ask the long term technical assistance adviser to take responsibility for developing such a long-term plan in consultation with the other members of UDAPE. A final discussion of this plan could facilitate a general agreement on at least the directions of the efforts.

--in a second step the division heads should use the device of the "pivotal study" to attempt to envision the research process over a period of six months or so. Every semester they should attempt to envision two or three "pivotal" studies which they see as likely down the path, so that individual efforts can have some context. I requested that one or two such efforts be made by the Division Chiefs to see if this would be a useful effort.

--the third step, which is more structural in nature, would establish a smaller group in UDAPE, perhaps with Bolivian PhD's as members, whose task would be the more basic research efforts and the development of a longer term research program. One or more analysts could also be assigned to this task. I do not suggest that this step be taken at this time, as it would depend greatly on the individuals involved and on the success of the other efforts. Nonetheless it is a possibility which should be explored in some detail.

5. The model of technical assistance that has been started should continue and be amplified, again as a

mechanism of developing some longer run analytical perspectives. In addition, UDAPE should be clear as to their commitment to a particular project which has TA. Those that promise to leave a significant training element in UDAPE, and which may develop a model that will have wider use, should be named priority projects, and the analysts involved should be assured of working with the consultants. Other projects which are quite specific, which are mainly of interest outside of UDAPE, or which can have little training benefit, should be dubbed "non-priority," and UDAPE should make clear that it will only commit time to help gather data. The consultants will be clear where they stand, and the analysts can take maximum advantage of the priority projects. The amount of technical assistance available in Bolivia indicates that it should be used judiciously to develop UDAPE's own capacities and in support of the sectoral effort which will be important to UDAPE's future development.

ANNEXES

ANNEX 1

TERMS OF REFERENCE FOR EVALUATION

As set forth in the contract between USAID/Bolivia and Dr. Kenneth Jameson, the areas to be covered included:

a. An analysis of the manner in which UDAPE accepts work assignments, establishes priorities and assigns responsibilities within its staff. Particular attention should be paid to the role and effectiveness of the Board of Directors in this process. Emphasis should also be placed on examining the volume of work versus the size and capability of UDAPE'S staff.

b. An examination of the quality of the analyses and the economic and sectoral policy options developed by UDAPE. This will include an analysis of the methodologies employed, the efficiency with which particular tasks are completed, the substance of the product and style of presentation. The evaluator will also examine the interrelationship among HIID's short term consultants, UDAPE staff and UDAPE's tasks. Specifically, the evaluator will review the manner in which the consultants' terms of reference are developed, their briefing upon arrival by UDAPE, the role of consultants as instructors vs. that of analysts, and the use to which their reports are put with respect to UDAPE's end product.

c. A thorough examination of the use to which UDAPE's analyses and policy options have been used by GOB clients. This is the most important element of the evaluation. To accomplish this task, the evaluator will select at least five studies completed by UDAPE and provided to GOB clients for disposition. The evaluator will then interview the clients to determine how these studies were specifically applied. Were they, for example, used for the development of a GOB policy, employed in negotiations with the IMF, or the like, utilized in the preparation of a sector and/or macroeconomic development plan, etc.?

ANNEX 2

LIST OF PERSONS INTERVIEWED FOR UDAPE EVALUATION

UDAPE PERSONNEL

Lic. Gonzalo Afcha, Executive Director

Macroeconomic Analysis Division

Lic. Juan Carlos Requena, Head
Lic. Javier Cuevas
Lic. Juan Carlos Aguilar
Lic. Victor Hugo de la Barra
Lic. Freddy Gumiel
Lic. Oscar Montaña
Lic. Juan Carlos Pereira

Information and Sectoral Analysis Division

Lic. Arturo Beltrán, Head
Lic. Victor Hugo Ayala
Lic. Gualberto Huarachi
Lic. Juan Ramón Ramirez
Lic. José Valdez
Lic. Freddy Valverde
Lic. Rodney Pereira

TECHNICAL ASSISTANCE PERSONNEL

Dr. Arthur Mann, HIID Long-term Technical Assistance Advisor
Dr. Walter Schulthess, HIID, Social Security Study

AID PERSONNEL

Dr. Clark Joel, AID/BOLIVIA Economist
Mr. Reese Moyers, Chief, Private Sector Office

GOVERNMENT OF BOLIVIA PERSONNEL

Sr. Gonzalo Sanchez de Losada, Ministro de Planeamiento y Coordinación
Dr. Juan Cariaga, Ministro de Finanzas
Lic. Fernando Candia, Subsecretario de Política Económica, Ministerio de Planeamiento y Coordinación
Lic. Ramiro Ortega, Subsecretario del Tesoro General de la Nación, Ministerio de Finanzas
Lic. Alfonso Kreidler, Subsecretario de Asuntos Agropecuarios, Ministerio de Asuntos Campesinos y Agropecuarios
Dr. Manuel Arellano, Subsecretario de Energía y Hidrocarburos, Ministerio de Energía y Hidrocarburos
Lic. Jaime Rubín de Celis, Subsecretario de Industrias, Ministerio de Industrias y Comercio
Dr. Juan Antonio Morales, Coordinador, Proyecto de Estrategias de Desarrollo, Ministerio de Planeamiento y Coordinación

Dr. Mario Suarez, Director de Hidrocarburos, Ministerio de
Energía y Hidrocarburos
Ing. Waldo Tejada, Director de Electricidad, Ministerio de
Energía y Hidrocarburos
Sr. Jacques Trigo, Director Ejecutivo de SAFCO(Sistema
Integrado de Administración Financiera y Control
Gubernamentales)

INTERNATIONAL ORGANIZATION PERSONNEL

Dr. Francisco Raúl Albergucci, IDB Representative in Bolivia
Dr. Francisco Gil Diaz, IMF Representative in Bolivia
Dr. William Shaw, World Bank
Dr. Laura Tuck, World Bank

Annex 3

SUMMARY OF UDAPE STUDIES

I had access to all the UDAPE studies I wished to see. In addition I was provided a summary of the studies in which some 75% were categorized according to their impact as perceived by UDAPE and according to the type of request which had stimulated the study. This information is attached, along with three diagrams developed by the executive staff of UDAPE which graphically show how the ongoing work of the analysts finally is brought together into a "pivotal study." These diagrams give an excellent feel for the full process.

In addition I used the annual reports, which run from July to June, starting in July 1984, and a listing of all the UDAPE studies which gave a brief description and, more importantly, the client, to develop the following tables which describe some elements of the studies.

TYPE OF UDAPE STUDIES OVER TIME

	84-85	85-86	86-87	87-88
Total Studies	85	125	148	103
Analytical Studies (Principal) (Conjunctural) (Working Papers)	24%	36%	50%	45%
Aide Memoranda Specific and Methodology	26%	28%	35%	27%
Statistical	12%	14%	10%	19%
	38%	22%	5%	9%

Source: UDAPE Annual Reports

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UDAPE CLIENTS FOR SPECIFIC STUDIES OVER TIME

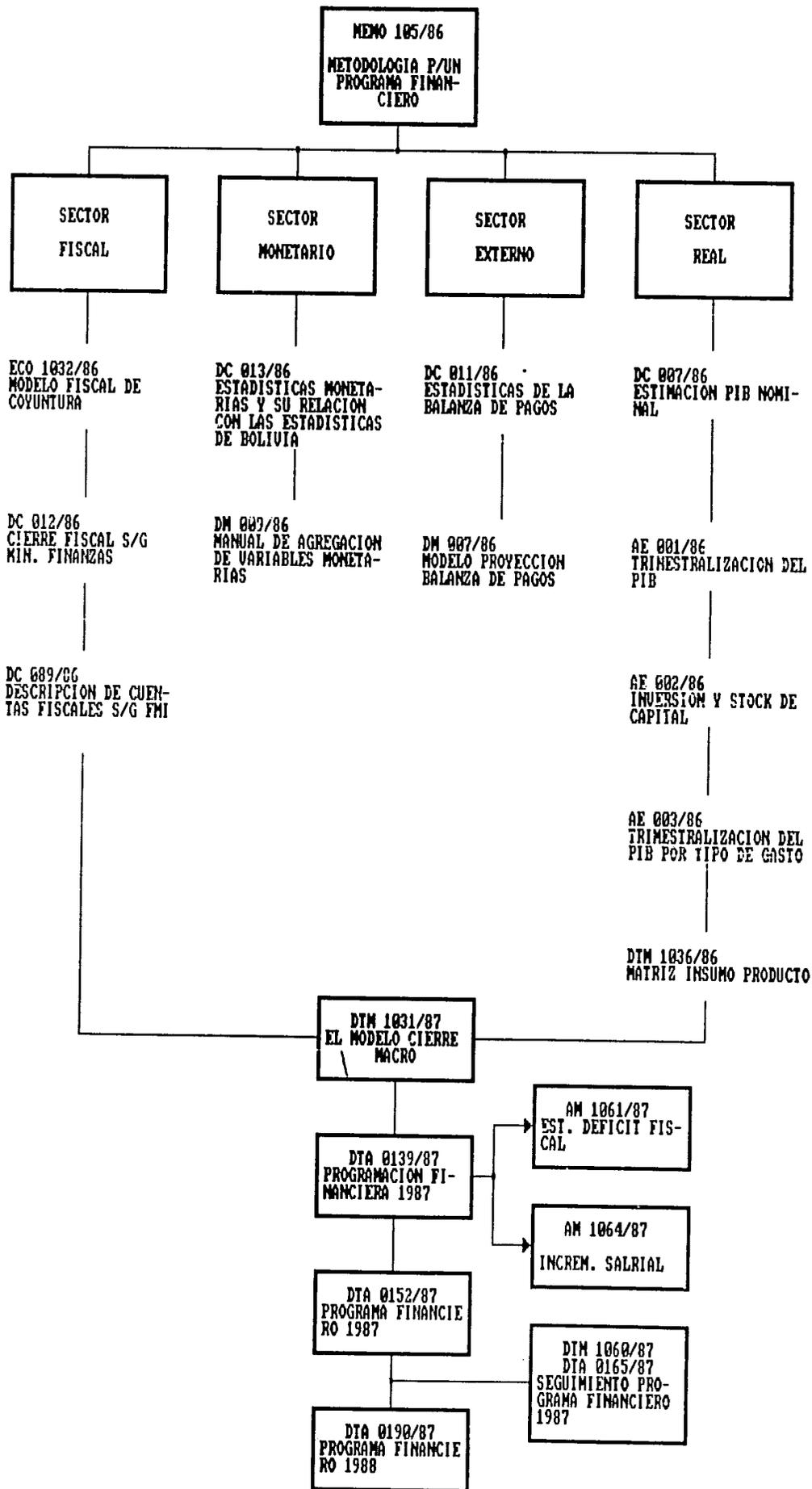
	1984	1985	1986	1987	1988 (June)
Min. Planning	2	3	19	16	19
Min. Finance	3	3	8	11	2
Min Industry		1	3	3	1
Min Energy			2	1	5
Min Agric.			2	1	
Tesoro Gen			5	2	2
Min Labor			1	3	
Min For Rel				1	
Central Bank			3		1
CEDEX			3		
Stock Exchange					2
Emer Soc Fund				2	
Chancery				1	
Intl Agencies			2	4	1
Total Studies					
Requested	5	7	48	45	34
Total Studies	18	102	130	127	55
Requested as					
% of Total	28%	7%	37%	35%	62%
Number of					
Clients	2	3	10	11	8

Source: UDAPE Compiled Listing of All Studies

Note: The number of studies in the two tables differ because certain statistical and methodological studies were omitted from the second compilation because they were for internal use only.

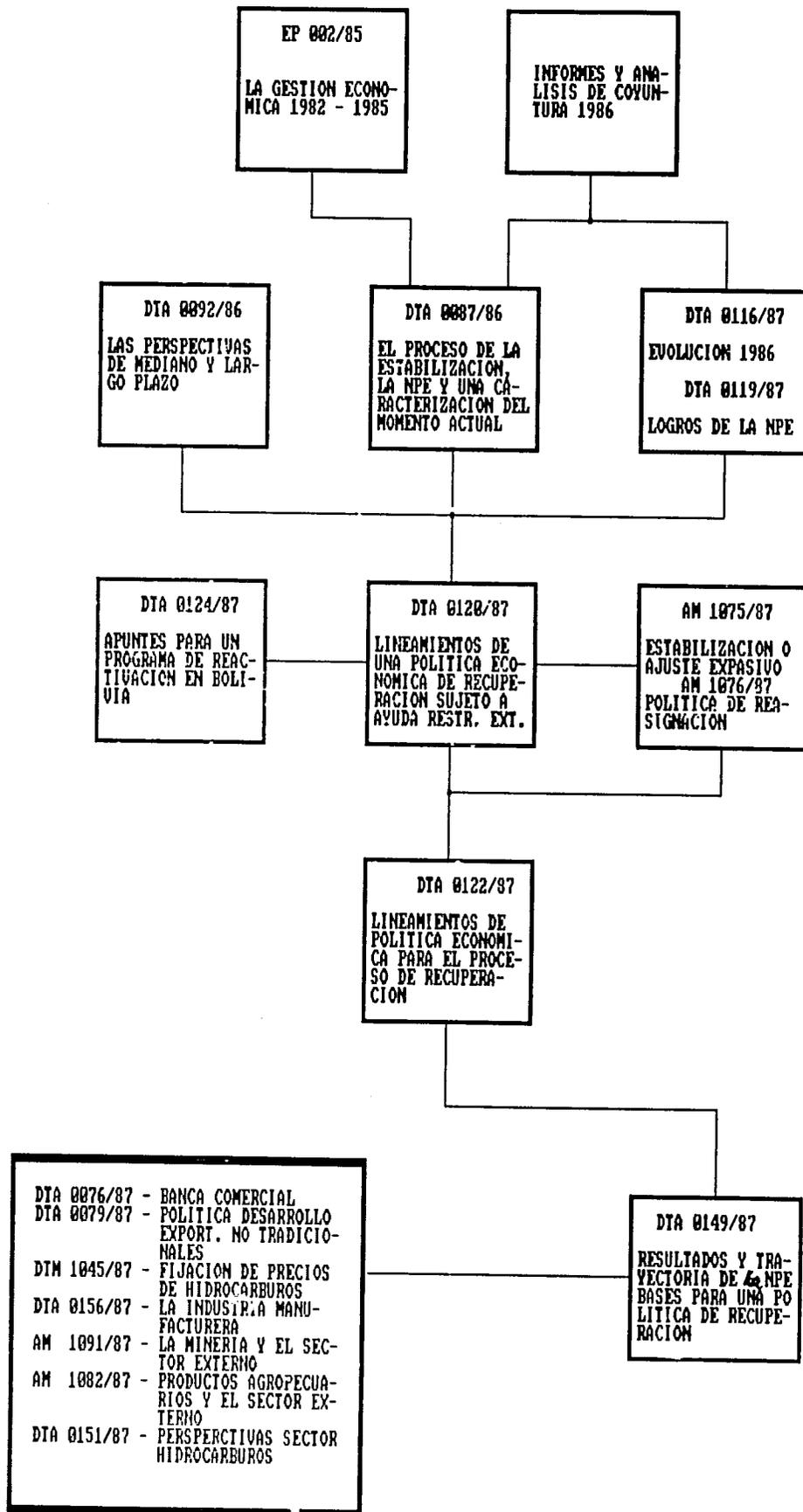
45

.CIERRE MACRO



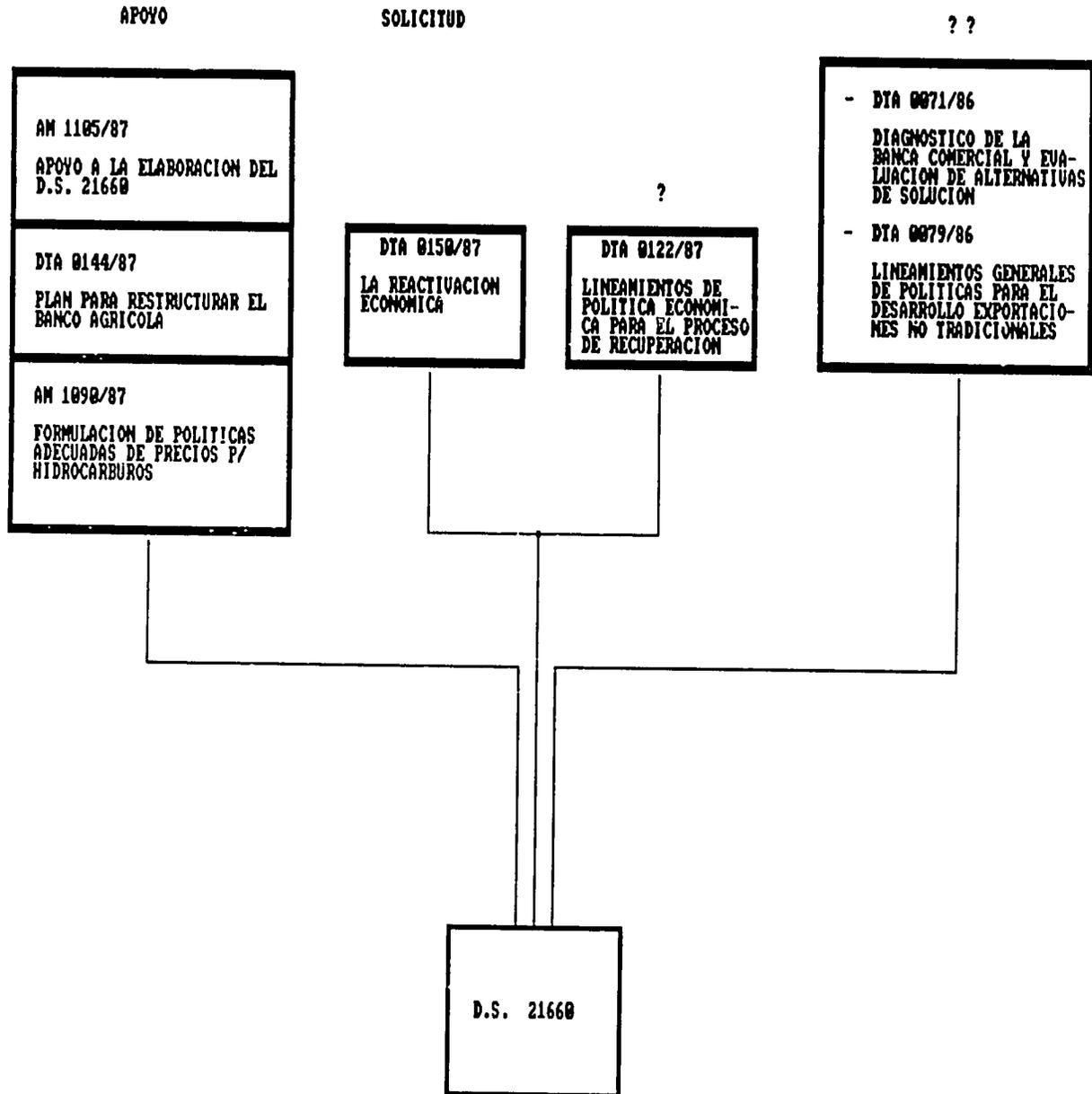
116

DE LA CRISIS A LA REACTIVACION



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APOYO A LA REACTIVACION



4/8

APORTES PRIMER GRUPO

Consideramos que este conjunto de documentos ha contribuido al proceso de toma de decisiones de política económica en aspectos concretos.

PROGRAMACION FINANCIERA

 * DTA-0139/87 Programa financiero 1987
 DTA-0152/87 Programación Financiera 1987
 **DTM-1060/87 Y DTA 0165/87 Seguimiento Programa Financiero 1987
 * DTA-0190/87 Programa Financiero 1988

REACTIVACION

 AM-1095/87 Indices de endeudamiento del sistema bancario (apoyo a otros documentos)
 AM-1096/87 Spread Bancario (apoyo a otros documentos)
 AM-1097/87 Riesgo Cambiario (apoyo a otros documentos)
 AM-1098/87 Proyección riesgo cambiario (apoyo a otros documentos)
 DTA-0076/86 Breve diagnóstico de la situación de la banca comercial y
 evaluación de algunas alternativas de solución
 DTA-0079/86 Lineamientos generales de política para el desarrollo de las
 exportaciones no tradicionales
 **DTA-0089/86 DTM-1045/86 Fijación de precios de hidrocarburos
 **AM-1090/87 Formulación de una política adecuada de precios relativos y
 absolutos para los principales productos refinados de petróleo
 * DTA-0122/87 Lineamientos de política económica para el proceso/ recuperación
 **DTA-0144/87 Plan para reestructurar el Banco Agrícola de Bolivia
 * DTA-0150/88 La Reactivación Económica
 **AM-1105/87 Apoyo a la elaboración del Decreto Supremo 21660

PLAN NACIONAL DE ENERGIA

DTA-0151/88 Perspectivas del Sector Hidrocarburos
 **DTA-0154/88 Plan Nacional de Energía: Documento parcial referido a los
 capítulos I La economía y la energía, II Previsiones
 macroeconómicas y el sector energía.
 DTA-0110/86 Bolivia: Proyecciones macroeconómicas 1986-1995 : La alternativa
 del gasoducto al Brasil
 DTA-0128/87 Evaluación de alternativas financieras en la construcción del
 gasoducto al Brasil
 DTA-0129/87 Análisis general de la economía de Bolivia 1970-1986
 **DTA-0187 Análisis de las formas alternativas de la generación eléctrica
 en Bolivia (actualmente en consideración de las autoridades).

GRUPO CONSULTIVO

 DTA-0106/86 La NPE Situación y Perspectivas
 **DTA-0107/86 El Programa Social de Emergencia
 **DTA-0108/86 Programa trienal de reconversión agrícola en las zonas del
 Chapare y Yungas
 **DTA-0118/86 Condiciones sociales de Bolivia - Justificación del Fondo Social
 de Emergencia

REFORMA TRIBUTARIA

 **EP(003/85) Diagnóstico de la Situación del Sistema Tributario en Bolivia
 **EE-2014/86 Lineamientos para una Reforma Tributaria integral
 AM-1045/86 Estimación de los ingresos esperados con la Reforma Tributaria
 **EE-2015/86 La falla fiscal en la NPE, mayores ingresos o de vuelta a la
 hiperinflación.

APOYO INSTITUCIONAL TGN	

† DN-010/86	Manual de Utilización del modelo de programación y reformulación del flujo diario de caja del TGN
† IS/N	Sistema de Información TGN
APOYO INSTITUCIONAL BCB	

DTM-1030/86	Fuentes y metodologías en las estadísticas sobre el sector servicios
APOYO INSTITUCIONAL INE	

DTE-2042/87	Índice de Quantum del Sector minero
DTA-0170	Matrix "Análisis del plan general de cuentas del sistema bancario"
DTM-1065	Matrix del sector externo: Indicadores de corto plazo
DTM-1047, 1048, 1049, 1050	Índices de Quantum, precios y valor de energía eléctrica, minería y cemento.
APOYO INSTITUCIONAL CNV	

DTA-0177	Consolidación del sector financiero formal
APOYO INSTITUCIONAL HTDL	

DTM-1059	Estadísticas salariales: Diseño de muestra para establecimientos económicos
APOYO INSTITUCIONAL DINE	

AM-1117	Regimen para los intercambios de energía y potencia: programa de análisis del sector eléctrico
AM-1118	Concepto de costo marginal o incremental.
ADHESION DE BOLIVIA AL GATT (Apoyo Institucional)	

† DTA-0164/88	Adhesión de Bolivia al Gatt
† DTA-0183/88	Observaciones a la primera versión del memorandum sobre el regimen del comercio exterior en Bolivia
FSE	
† DTM-1058	Modelo para medir el impacto macroeconómico de los proyectos del FSE
SEGUIMIENTO DE CORTO PLAZO	

(ECO-1025/85)	Efectos y Resultados de la Nueva Política Económica
-(ECO-1029/86)	Análisis de la NPE a los 4 meses de su aplicación
ECO-1030/86	Análisis económico de coyuntura - febrero 1986
ECO-1033/86	Análisis económico de coyuntura - marzo 1986
ECO-1034/86	Análisis económico del primer trimestre del año 1986
ECO-1035/86	Análisis económico de coyuntura - abril 1986
ECO-1039/86	Análisis económico de coyuntura - mayo 1986
DTA-0077/86	Análisis económico de coyuntura - Junio 1986
DTA-0082/86	Evaluación de la NPE a 11 meses de su implementación
DTA-0083/86	Análisis económico de coyuntura - Julio 1986
DTA-01206/86	
DTA-0126/87	La economía boliviana durante el año 1986
AM-1063/87	Resumen de la evaluación económica de 1986

CEDEX

ECO-1026/85

La NPE implementada el 29 de agosto de 1985, sus logros y una proyección estimativa.

Primer doc. p/negociac

DC-010/86

Alternativa de tratamiento a la Deuda Externa Pública con la Banca Privada Internacional

DC-015/86

Reformulación de las proyecciones de la Balanza de Pagos

DC-016/86

El proceso de ajuste de la economía boliviana

DC-017/86

Previsiones sobre el comportamiento de la economía
Modelo de Renegociación Deuda Externa



ANNEX 4

REVIEW OF SIX UDAPE STUDIES

The terms of reference of the evaluation asked that five studies be selected and evaluated, and that this be a central element in assessing UDAPE's role in the policy process. Although it seems clear that the more extensive documentary record, as well as the interviews, are probably better indicators of this role, an examination of these studies can add another dimension.

Six studies were chosen, primarily to ensure coverage of the various Ministries which have membership on the Consejo Directivo. They are all studies which the UDAPE executives felt had an impact on policy. This is not to say that all documents fall into this category, for even in the UDAPE listing there are many examples which may not or did not. Finally, the studies provide a mix of authors, technical assistance advisers, and in-house studies.

The general conclusion is that the quality and effect of the studies varies substantially, which reflects the many demands made on UDAPE at this point. One goal for the future might be to increase the uniformity of the studies, perhaps through a more rigid internal evaluation, though the varied demands are likely to continue and so this may be difficult. Nonetheless, in virtually every case there is a clear role in the policy process, indicating again the basic success of UDAPE in fulfilling the purpose of the project.

Let us examine the studies in chronological order (studies done by consultants are noted with an *).

DTM 1019/86: Outlines of an Integrated Tax Reform, by Carlos Otálora

This study was done in collaboration with the Ministry of Finance through a contract with a Bolivian technician and was issued in February 1986, just as the tax reform issue began to arise. The actual tax reform was promulgated in May 1986.

The paper combines a good basic sense of public finance with a good working knowledge of the existing tax structure. It starts with a set of suggested changes that would undo the damage that inflation and lack of enforcement of taxes had occasioned, e.g. making payments through banks, changing specific levies to percentages of value. It then moves to a set of structural problems. For example, there are a series of taxes which generate little revenue which should be removed; the existing value added tax simply didn't work; the beer tax and several others were not sensible. It finally suggests a whole series of steps for a new tax system and for new mechanisms of enforcement.

The paper is quite careful, not very theoretical, but

with a good sense of the reality of Bolivia.

A review of the actual Tax Reform shows that a number of these elements entered, the change in the taxes on beer, the suggestions for improving the value added tax, and allowing payment through the banking system. Of course it is not clear that the items were taken directly from the study, but there does seem to be a good correspondence.

It should also be noted that one short-term technical adviser was used in this reform, apparently quite extensively.

DTA 122/87: Economic Policy Guidelines for a Process of Recovery, by Gonzalo Afcha, Flavio Escobar and Erick Larrazabal

This study was very similar to the above. It appeared in February 1987, preceding the actual Decree of Economic Reactivation which appeared in July of the same year. It was perhaps more of a political economic piece of work, drawing less on economic theory and detailed knowledge of the workings of the government, than on a sense of the existing and potential problems.

After a history of the political economic situation, it moved to examine key issues that would have to be dealt with in any effort at recovery: increasing capital expenditures; encouraging foreign investment; stabilizing the exchange rate; modernizing the financial sector; controlling investment projects; and stabilizing the price level.

The actual decree incorporates directly many elements suggested in the study. The decree is much more specific and has legal mechanisms, but the general outlines are fairly parallel to what was in the report. Further evidence of the role is that the Minister of Planning, who developed the plan, relied on the document to float the idea of a recovery or reactivation program in a speech he gave several months before the actual decree was promulgated.

*DTA 144/87: Plan to Restructure the Bolivian Agricultural Bank, by Jerry Ladman.

This study is quite discursive and after providing a general history of the bank and of agricultural credit, examines a number of problems with providing credit to small and medium sized farmers.

It then suggests a number of steps which can be taken to get credit to rural areas and suggests specific organizational steps which the bank should take to ensure the effectiveness of its activities in this area.

The incorporation of this study into the legal documents is quite clear. In the Decree on Economic Reactivation, there is one entire section (Chapter VIII) on the Bolivian Agricultural Bank. Especially in the suggested administrative restructuring, the points are taken almost directly from this

study.

It is interesting to note that there was a later World Bank study/proposal on this area which Under-secretary Kreidler indicated was not acceptable to the Bolivian government. He acknowledged the importance of the UDAPE contribution in this case, both to his Ministry and the Ministry of Finance which has more direct responsibility for the bank.

*DTA 0182/88: Small and Medium Industry Exports: Perspectives and Problems, by Rufino Cebrecos

This study attempted to reach out to the private sector and in particular to examine the possibilities of exports of furniture pieces and of shoes. It was based on a series of interviews with producers and producer groups, and drew upon the expertise of several businessmen in this area.

There was some economics involved, having to do with the role of macroeconomic instability in discouraging exports.

For the most part, the study ended up suggesting that a series of very technical consultants be hired to help in the marketing and the product quality areas. Reese Moyers of the Private Sector Division felt that the producer groups were too small and insignificant to export successfully.

The study may have been a useful attempt, but it is not clear whether this is a role that UDAPE should be playing.

*DTA 0187/88: Analysis of Alternative Modes of Generating Electricity, by Carlos Bastos and Carlos Givogri

This is the most high-powered of the studies, undertaken at the request of the Ministry of Energy, with the issue of the reorganization of the electricity system. Good basic data were collected, primarily through UDAPE also with technicians from the Ministry. A model was developed, or applied, which allowed an economic assessment of several different organization scenarios, for the most part favoring an interconnected distribution system. This study, and a companion study on the pricing of hydrocarbons, seem to represent the best of the UDAPE model. Given the information and the models which have been developed, the next step will be to bring them together into an overall understanding of the energy sector. More importantly from the UDAPE perspective, it will be possible to link them into the macroeconomy and to build in macroeconomic constraints and possibilities for the sector.

So this has all the possibilities of an excellent sectoral contribution by UDAPE.

DTA 0190/88: The 1988 Financial Program, by Gonzalo Afcha and Gaby Candia

This is clearly a "pivotal study." It draws amply upon

many of the macroeconomic studies that had been done in UDAPE and on the expertise in different macro areas that had been built up over time.

It looks at the key macro areas that are relevant for the IMF program, and documents their performance, the underlying theoretical understanding, and the kinds of projections that can be made. It shows how Bolivia for the first time came to the IMF with their own data and as a result with their own position in the negotiations for assistance.

This study and its sub studies have clearly provided the basis for monitoring the IMF program which is now a major preoccupation of the Ministry of Finance, and in which UDAPE participates.

ANNEX 5

ORGANIZATIONAL CHARTS OF UDAPE

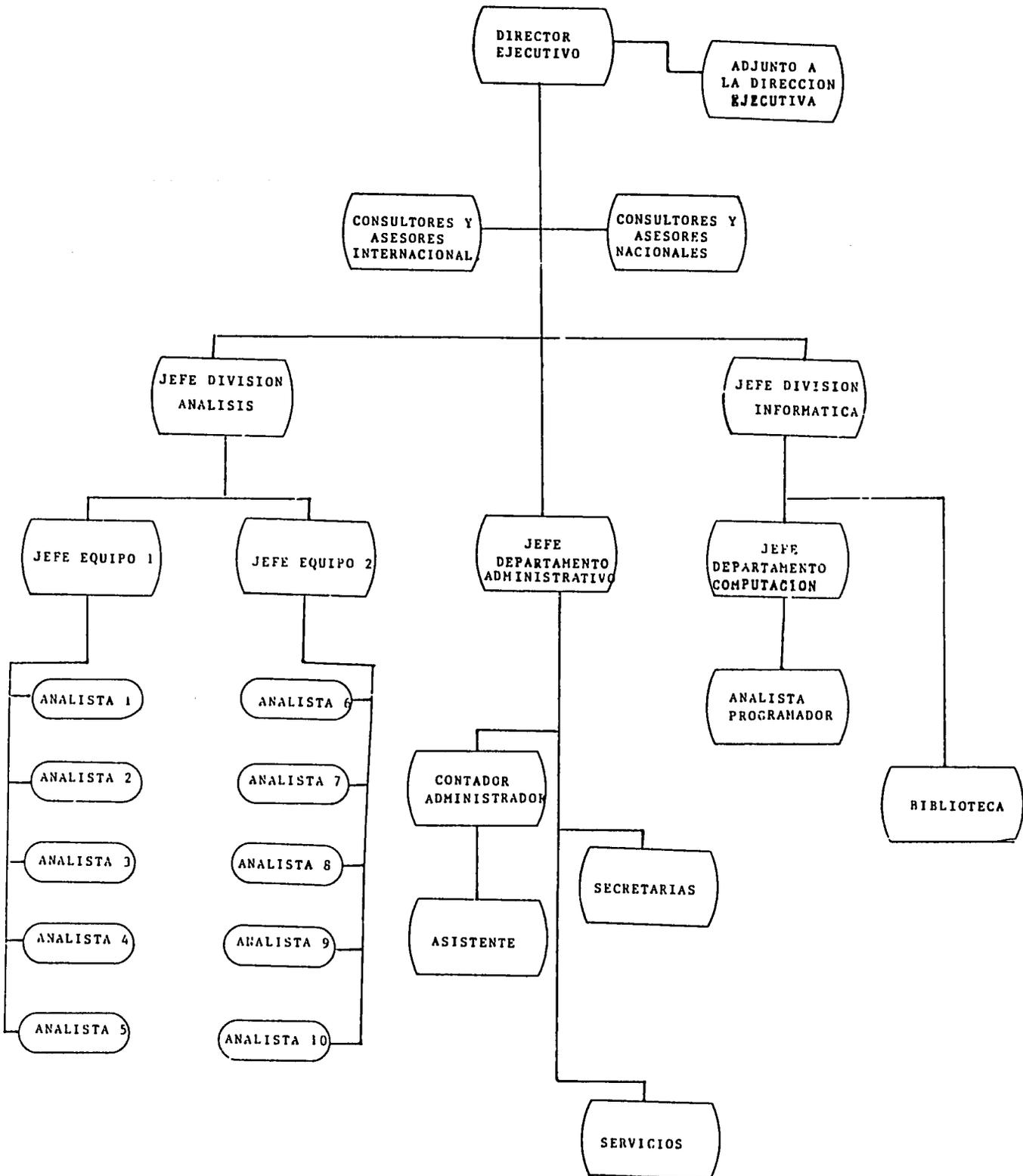
There have been three basic organizational structures in UDAPE since its inception. The first differentiated between economic analysts and statistical analysts, and had them in separate sections. This was useful in the early years, when data collection was a separate and time-consuming and challenging effort. Over time, the distinction blurred, and some of the statistical analysts came to have as much knowledge of their area as the economic analysts. So the second organization put them together and separated off the information division.

Although computation and statistics are quite active, most of the work is done in the analytical areas. And so the third organization, which was implemented within the last month, creates two major divisions, Macroeconomic Analysis, and Information and Sectoral Analysis, with analysts assigned evenly between the two. This seems a logical division, though most analysts feel it will actually be very flexible. The unknown question is how the Sectoral Division will develop over time. There are presently two real sectoral studies, one on food donations and the other on electricity and hydrocarbons. These may provide guidance for the future development of the division.

The two more recent organizational charts are attached.

ORGANIGRAMA DE LA UNIDAD DE ANALISIS DE POLITICAS ECONOMICAS

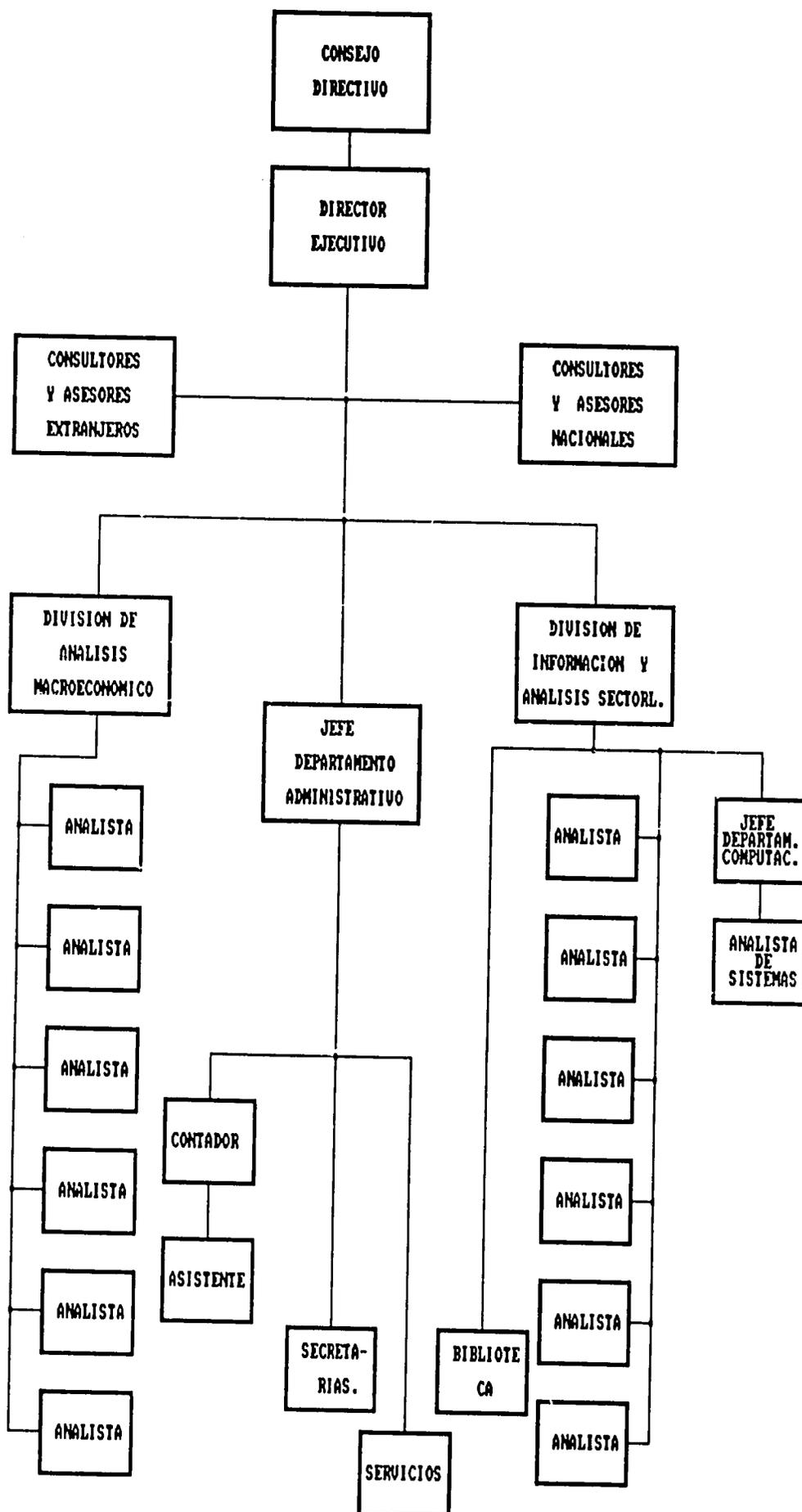
(1987)



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ORGANIGRAMA DE LA UNIDAD DE ANALISIS DE POLITICAS ECONOMICAS

(June 1988)



APORTES SEGUNDO GRUPO

Constituyen principalmente requerimientos del Sector Público y solicitudes de Gobierno. No se puede concretar el grado de contribución que hayan tenido estos documentos.

INDICE DE PRECIOS (MIN. PLANEAMIENTO)

EP-004/86	Reformulación y Ajuste del Índice de Precios al Consumidor
ECO-1038/86	Evaluación del proyecto de reformulación y ajuste del IPC
AM-1050/86	Reformulación y Ajuste del IPC
AM-1052/86	Comentarios de la metodología de enlace de la serie del IPC

SECTORIALES (MINISTERIO FINANZAS)

DC-006/86	Reformulación del Presupuesto del TGN ante incrementos salariales alternativos
AM-1042/86	La crisis boliviana y la NPE
AM-1048/86	Perspectivas del Presupuesto del TGN (Segundo semestre 1986)
MEMO-108/86	Financiamiento del incremento salarial a través de incrementos en los precios de los hidrocarburos vendidos internamente
ECO-1031/86	Estacionalidad de los ingresos del TGN
DM-011/86	Manual de utilización del modelo para la programación, seguimiento y evaluación del flujo financiero diario de la economía
DTA-0114/87	Presupuesto YPFB
DTA-0117/87	Impacto del presupuesto de 1987 en la economía boliviana
AM-1049/86	Situación de Yacimientos Petrolíferos Fiscales Bolivianos
AM-1065/87	Impuestos YPFB
DTA-0123/87	La Política de estabilización en Bolivia
DTA-0115/87	La Nueva Política Económica
DTA-0159	La sustitución de las agencias del BANEST de acuerdo al DS 21660
DTA-0161	Análisis económico financiero de ENFE
DTA-0189	La creación del mercado de valores en Bolivia
DTM-1057	Una estimación de los presupuestos de ingresos de la Dirección General de la Renta y de la Renta Aduanera para la gestión económica de 1988
AM-1127	Evaluación de la economía boliviana 1987.

SECTORIALES (MIN. PLANEAMIENTO)

EE-2016/86	Problemas del sector minero para su promoción
EE-2017/86	Política agropecuaria: Plan de Inversiones 1987-1990
EE-2018/86	Políticas de desarrollo sector energía
EE-2019/86	Política sectorial - sector minero
EE-2020/86	Política sectorial sector transportes
EE-2021/86	Diagnóstico agropecuario 1970-1985
DTA-0081/86	Esquema integrado de objetivos, políticas y metas nacionales y sectoriales
DTA-0090/86	Impacto de objetivos y metas de demanda final en el nivel de empleo
AM-Varios números	Pérdidas económicas ocasionadas por las huelgas
AM-Varios números	Notas sobre la inflación
DTA-0094/86	Situación y Perspectivas de la economía boliviana : Un diagnóstico

DTA-0136/87	Tipo de cambio y estabilización de precios
DTA-0137/87	Política cambiaria en el proceso de estabilización y ajuste
DTA-0143/87	Evaluación y perspectivas de la NPE (Informe Presidente de la República)
AM-1066/87	Breve evaluación económica de los departamentos petroleros
AM-1077/87	Creación del Fondo Nacional de Desarrollo Regional y una reglamentación alternativa
AM-1093/87	Evaluación del sector real
DTA-0125/87	Reflexiones sobre la NPE
DTA-0186	Empleo, recursos humanos e ingresos en Bolivia: una propuesta para la acción
AM-1108	Situación del mercado de crédito para capital de trabajo
AM-1109	Observaciones al informe del Banco Interamericano de Desarrollo sobre situación económica reciente de Bolivia
AM-1114	Rezago Cambiario
AM-1113	Respecto a la posible modificación del Regimen Arancelario
AM-1115	Análisis de la relación entre la expansión del crédito interno, inflación, tipo de cambio
AM-1116	Análisis comparativo: Cuadro de fuentes y usos externos Banco Mundial y Gobierno
AM-1123	Impuestos sobre vuelos internacionales y nacionales
AM-1124	Pesibles impactos de la liberación en la entrega obligatoria de divisas por exportaciones provenientes del sector privado
AM-1125	Política Cambiaria
DTA-0195	Evaluación de la Economía Boliviana. Agosto 1987 - julio 1988

SECTORIALES (MIN. ENERGIA)

DTA-0078/86	Impacto de los costos sectoriales de variaciones de los precios de productos refinados de petróleo.
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SECTORIALES (MIN. INDUSTRIA Y COMERCIO)

DTA-0079/86	Lineamientos generales de política para el desarrollo de las exportaciones no tradicionales
DTA-0084/86	Análisis sobre la oferta real y potencial de exportaciones no tradicionales
DTA-0168	Bolivia's manufactures exports: A more optimistic outlook?
DTA-0179	La pequeña y mediana empresa industrial: Un diagnóstico y recomendaciones de política
DTA-0182	Exportaciones de la pequeña y mediana industria: Perspectivas y Problemas

SECTORIALES (OTROS)

DTA-0086/86	La NPE y la generación de instrumentos alternativos de política salarial concertada
AM-1103	Establecimiento del "Acuerdo de Intercambio Compensador"

APORTES TERCER GRUPO

Elaborados para poder elevar la capacidad de análisis y la mejor comprensión de los temas económicos.

EP (002/85)	La gestión económica 1982-1985
ECO-1027/85	Medición funcional de la distribución del Ingreso en Bolivia 1970-1985
ECO-1029/86	Posibilidades de generar empleo a través de algunas políticas económicas
ECO-1036/86	Evolución de los salarios, del costo de vida y del déficit económico 1980-marzo 1986
ECO-2012/86	La influencia de la política cambiaria en el sector externo
DC-003/85	Identificación de productos sujetos a mecanismos adicionales de fomento a las exportaciones
DTA-0087/86	El proceso de estabilización, la NPE y una caracterización del momento actual
DTA-0091/86	Las perspectivas de corto plazo de la política económica
DTA-0092/86	Las perspectivas de la economía boliviana a mediano y largo plazo
DTA-0088/86	Lecciones de las hiperinflaciones europeas
DTA-0116/87	Evaluación económica del año 1986
DTA-0117/87	Logros de la NPE (Documento para CEPAL)
DTA-0120/87	Lineamientos de una política económica de recuperación sujeta a una aguda restricción externa
DTA-0124/87	Apuntes para un programa de reactivación en Bolivia
DOCUMENTOS PARA FACILITAR LA COMPRENSION DE LA ECONOMIA	
DTA-0134/87	Sugerencias de política económica de corto plazo en la perspectiva de la reactivación
DTA-0135/87	El enfoque monetario del tipo de cambio: Caso boliviano
DTA-0136/87	Análisis de la evolución del sector eléctrico en 1986
DTA-0145/87	La orientación económica de la actividad industrial
DTA-0146/87	Historia económica de la Hacienda Pública boliviana
DTA-0147/87	Análisis del presupuesto del sector público consolidado
DTA-0148/87	Yacimientos Petrolíferos Fiscales Bolivianos
DTA-0149/87	Resultados y trayectoria de la NPE: Bases para una política de recuperación
DTM-1032/86	Evolución y diseño de una política alternativa para acelerar el desarrollo industrial
DTM-1043/86	Diagnóstico socioeconómico de Bolivia - Instrumento de cálculo para determinación de la canasta básica de alimentación
AM-1074/87	Estabilización o ajuste: disyuntiva de la NPE
AM-1075/87	Estabilización o ajuste expansivo
AM-1076/87	Política de Reasignación
AM-1078/87	Algunos elementos acerca del nivel y tendencia del tipo de cambio
AM-1083/87	La distribución del ingreso en Bolivia
AM-1084/87	Política Monetaria
AM-1091/87	La minería y el sector externo
AM-1092/87	Productos agropecuarios y el sector externo
AM-1094/87	Comparación de indicadores presupuestarios de Bolivia respecto a

ANNEX 6

MONTHLY MONITORING OF UDAPE PROJECTS

UDAPE now has in place a monitoring system which allows it to track its studies over time, and on a monthly basis. The most recent example is included. There seems to have been a relaxation in monitoring over the last year, but this has now been reversed, and the actual system seems quite good.

Comparing the last two month's work shows that studies do move through the system. In July there were 16 studies in the A1 category, four continued from the month before, 8 had moved up from a lower category in the previous month, and four were new studies. Two were in response to the suggestions of the Consejo Directivo, and one was in response to the request from the World Bank. One study had moved into the paralyzed state from the design stage, and several studies simply disappeared from the list. Only one of those was clearly a finished product, the information system for UDAPE.

The most recent example follows.

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No. TRAB.	TRABAJOS	PERSONAL															
		J.C. R	J V.H. C d.I.B	J.C. P	F G	D M	J.C. A	A B	J.R. R	G H	R p	V.H. A	F V	J V	P. G.	S A	
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Carga Efectiva de Trabajo por Analista(1)		2	5	5	3	6	6	3	3	1	5	3	3	4	2	2	4

1) DENOMINADOR DE SITUACION DE TRABAJO

- 1) = Etapa de Ejecución
 - A1 = Ejecución: Rango de 75% a 100%
 - A2 = Ejecución: Rango de 50% a 75%
 - A3 = Ejecución: Rango de 25% a 50%
 - A4 = Ejecución: Rango de 0% a 25%
- 2) = Etapa de Diseño
- 3) = Etapa de Idea
- 4) = Trabajo Paralizado

1) La carga efectiva de trabajo se refiere solo a trabajos de la categoría A

JCR= JUAN CARLOS REQUENA
JC = JAVIER CUEVAS
JHR= VICTOR HUGO DE LA BARRA
JCP= JUAN CARLOS PEREIRA
JB = FREDDY GUMIEL
JM = OSCAR MONTANO
JCA= JUAN CARLOS AGUILAR

AD = ARTURO BELTRAN
JRR= JUAN RAMON RAMIREZ
GH = GUALBERTO HUARACHI
RP = RODNEY PEREIRA
VHA=VICTOR HUGO AYALA
FV = FREDDY VALVERDE
JV = JOSE VALDEZ

PG = PERCY GRUNDY
SA = SUSANA ARZE

ANNEX 7

TRANSITION ISSUES

UDAPE has had its ups and downs in the political world of Bolivia. It is now on an upswing. There are three changes which could affect its survival.

The first would be the departure of the Executive Director. There is no indication that this is at all in the offing, though he certainly would not lack job offers. Creating an effective executive committee would be one means of ensuring a smooth transition if this were to occur.

The next is the election of 1989. At a minimum a new government would be likely to change the location of UDAPE within the government, according to where the new center of power lay, and it is likely they would want their own Executive Director if it were not an MNR government. Again the executive committee would be important here, but also the image-reality of a capable technical operation would be important. This implies that the publications and analytical studies would have a great utility in making a new government feel secure with UDAPE. One would hope that the team mode of work would ensure its maintenance as an entity rather than its separation into a series of Ministries. Another factor favoring its survival is the continuation of AID funding through the first year of the new administration.

Finally, the transition at the end of the funding for the Amended Project will be quite significant. It would be hoped that the project could simply pass over onto Government of Bolivia funding sources. Of course there can be no guarantees. However, I know that some thought has been given to what the central core of the project would consist of and how it could be run on a tighter budget, so this is an issue that can be confronted actively when the time comes.

ANNEX 8

PERSONAL OBSERVATIONS

I last evaluated UDAPE in May 1985 at a time of great turmoil in Bolivia, and less in UDAPE, though it was undergoing a transition of directors at that time. I made a number of suggestions and observations at that time.

I am gratified that many of them have become operational. There is now a more active sectoral analysis component; the studies on income distribution and the informal sector were done, though more could still be done; the computer configuration has been improved dramatically, much along the lines I had suggested; there is now an information system, which probably could have been done before with UDAPE resources if they had not had the "help" of international consultants, but which is an excellent home-grown system at this point; they have used many more Latin American consultants who are much better able to deal with the reality of Bolivia in very quick order.

There are a number of other areas of success that I would not have expected: the ability to undertake staff development and at the same time to keep the team together and working and to integrate new and very capable analysts in the process; and the access to policy-makers which benefitted me in being able to meet the ministers and under-secretaries but which is a tribute to UDAPE's importance in the policy area.

There are some areas that do concern me, such as the closing of many doors for communication, the absence of publications, the instability in long-term technical assistance and the shift away from analysis. But these are fairly easily remedied if the desire is there.

But overall, I am very pleased to have been involved, even if only peripherally, with UDAPE, which has shown itself a dynamic, creative and positive force in Bolivia and whose trajectory seems likely to continue in a very positive manner.

ANNEX 9

ISSUES OMITTED

It should be noted that there are a number of issues with UDAPE that are not directly addressed in this evaluation, but which cannot be completely segregated, and which will presumably enter into any final evaluation. In the amended project, a Project Analysis capacity figured prominently, though it does not currently function in UDAPE because the Government of Bolivia established a specific institution to deal with those issues. There have been gaps in the technical assistance, first the year hiatus between the Robert R. Nathan contract and the operationalization of the Harvard Institute for International Development contract, and currently the absence of a long term technical assistance adviser. And there have been continued difficulties with procurement for the project.

Although each of these has affected the project, the activity has certainly not been interrupted, and so they correctly are omitted from this evaluation, though they will certainly enter into any final evaluation.

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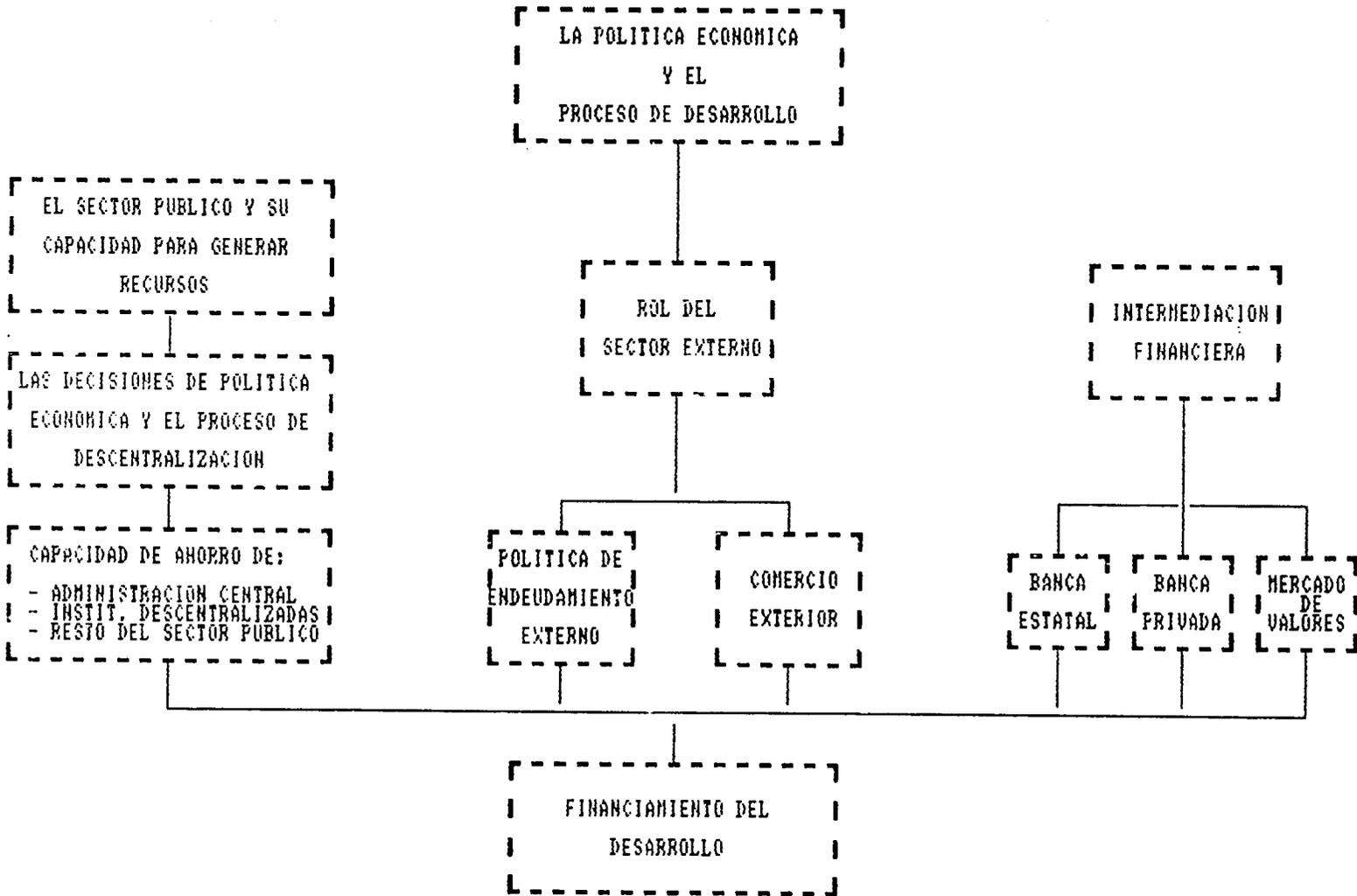
ANNEX 10

MATERIALS FOR SUBSEQUENT EVALUATION

I have compiled a set of materials on UDAPE of July 1988: internal organizational documents; a number of studies; extended examples of the monitoring process; the first four annual reports; a listing of the staff; and a number of others. They will be left in AID as a kind of baseline for whoever does the final evaluation of the project. Combined with the sources of information that I have included in the report, they should facilitate the documentary side of the final evaluation. I hope that the approach taken, the "mosaic methodology," may also be of use in evaluating a project which does have quantitative outputs, and which has certainly exceeded the goals at this point, but whose actual effectiveness is a much more qualitative issue.

I hope the final evaluation will be as favorable as this evaluation and that the adjustments suggested will have been made successfully and to the benefit of the project.

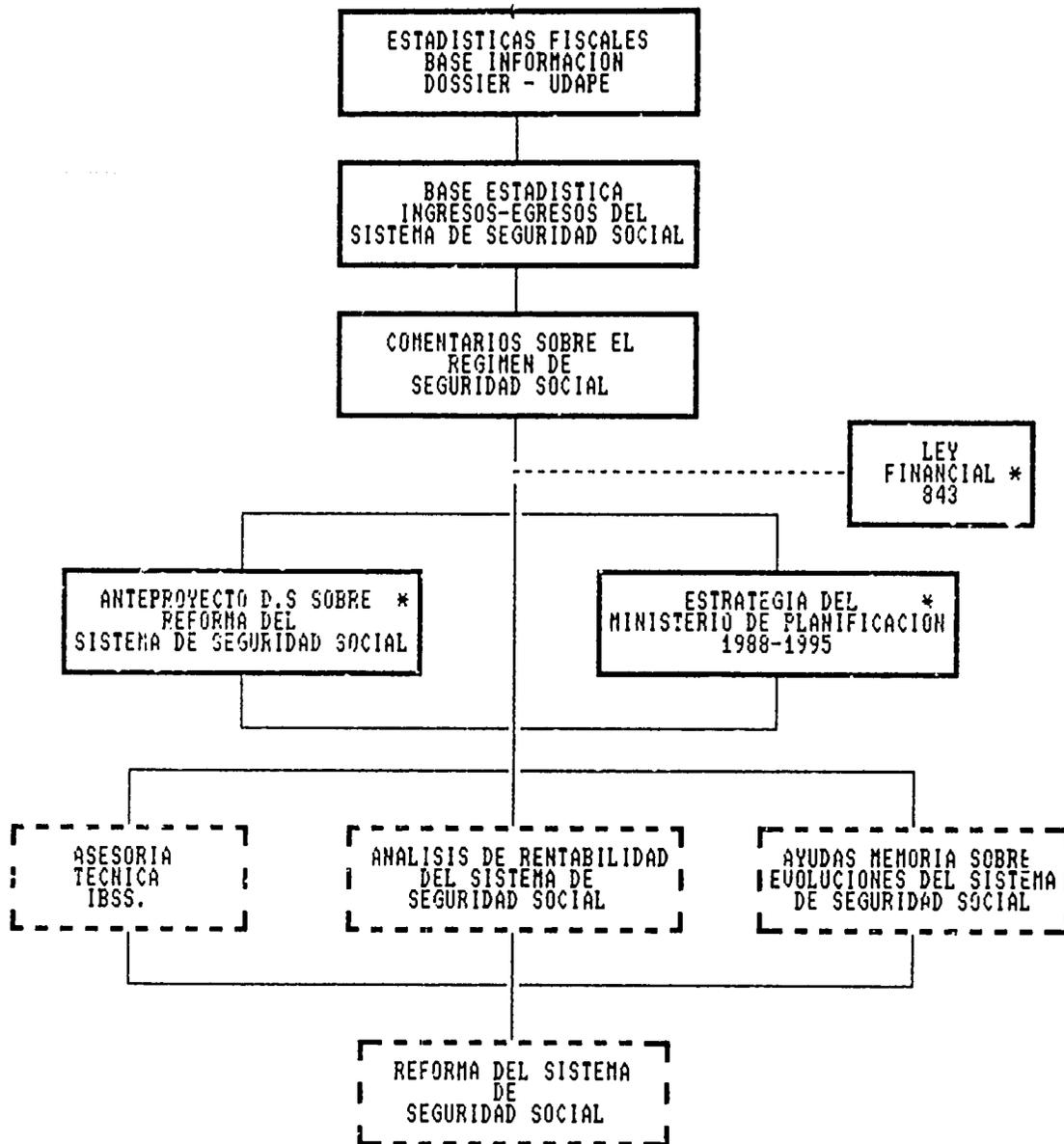
FINANCIAMIENTO DEL DESARROLLO



REFERENCIAS



Trabajos Planificados



REFERENCIAS

 Trabajos Planificados

 Trabajos Realizados

(*) Trabajo no realizado por UDAPE.