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Economic Commission for Latin America and the Caribbean

REPORT OF THE WORKSHOP ON TECHNICAL AND ECONOMIC CO-OPERATION FOR THE LATIN AMERICAN MINING AND METALLURGICAL SECTOR *

(Santiago, Chile, 19-23 November 1984)

*/ Organized by the Economic Commission for Latin America and the Caribbean (ECLAC) and the Latin American Integration Association (ALADI), under the auspices of the Commission of European Communities (CEC).

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/I. ATTENDANCE

I. ATTENDANCE AND ORGANIZATION OF WORK

Place and date

1. The Workshop on Technical and Economic Co-operation for the Latin American Mining and Metallurgical Sector was held at ECLAC Headquarters in Santiago, Chile, from 19 to 23 November 1984. It's aim was to consider two basic questions: (a) What practical measures could be taken to increase the contribution of the mining sector to Latin America's economic development on the basis of horizontal co-operation within the region and interregional co-operation with countries of the European Economic Community (EEC); and (b) what could be done to foster industrial development based on the utilization of minerals and metals and to promote higher value-added in Latin America through vertical integration.

Attendance 1/

2. The Workshop was attended by 24 specialists from the mining sector of Latin America, Europe and regional and internacional bodies, together with 49 representatives from private governmental and international bodies.

Agenda 2/

3. The meeting based it's discussions on the following agenda:

1. Possibilities for increasing international trade in minerals and metals from Latin America.

   (a) Possibilities for diversifying the production and achieving the complementarity and integration of Latin American mining activity.

   (b) Possibilities for diversifying the production and achieving the complementarity and integration of mining activity in the countries of the Andean subregion.

   (c) Possibilities of increasing intraregional trade in minerals and metals.

   (d) Major marketing systems for minerals and metals.

2. Development policies for the Latin American mining sector.

   (a) Technical assistance and technology transfer in the Latin American mining and metallurgical sector.

/(b) Horizontal

(b) Horizontal co-operation in the Latin American mining and metallurgical sector.

(c) Investment and development promotion policy, sources and forms of financing.

(d) Financial effects of mining development agreements: some notes on recent mining agreements in Latin America.

(e) The role of the public and private sectors in the development of the Latin American mining sector.

3. Possibilities for regional and interregional complementation within the mining, metallurgical and metal working industry.

(a) Vertical integration options for Latin American mining.

(b) Supply and demand for capital goods in the Latin American mining sector.

4. Consideration of final report, conclusions and recommendations.

Opening meeting

4. The opening meeting began with an address by Mr. Norberto González, Deputy Executive Secretary for Economic and Social Development of ECLAC. Mr. González, after welcoming the participants, gave a brief account of the Latin American economy and particularly of the mining and metallurgical sector. He referred to the prospects of development of the sector and to the trading relations with the industrialized countries. After announcing the agenda and aims of the Workshop, he said he was confident that its deliberations would make it possible to determine the real prospects for the development of the sector and for regional and interregional co-operation. He expressed his hope that the discussions would be fruitful and that follow-up measures would result which would enable some of the ideas put forward to be realized. Finally, he offered the collaboration of ECLAC for this purpose.

5. Mr. Dieter Oldekop, Representative and Head of the Santiago Office of the Commission of European Communities (CEC), alluded to the policies concerning trade between Latin America and the EEC and to the repercussions of the crisis on these. He hoped that one of the results of the meeting would be the adoption of measures enabling complementation between the EEC and Latin America to be achieved. He wished the Workshop

/every success

every success and offered the support of the European Communities in following up it's work and putting it's conclusions into practice.

II. SUMMARY OF DEBATES

Possibilities for increasing international trade in minerals and metals from Latin America (Agenda item 1)

Possibilities for diversifying the production and achieving the complementarity and integration of Latin American mining activity

6. It was emphasyzed that it was necessary:

(a) To identify new ways of improving the management of mining resources during the present crisis, including the improvement of Latin America's bargaining power in the international minerals market;

(b) To take measures to maintain and increase the medium and long term participation of Latin America in the international minerals and metals market;

(c) To increase the region's geological and mining knowledge;

(d) That governments should define a national and sectoral mining policy which would establish the organizational functional and legal bases for this sector, incorporating the institutions, providing guidance, in order to impart more dynamism to the mining industry of Latin America and the Caribbean;

(e) To achieve joint participation by the State and the private sector in the operations of prospection exploration, exploration and utilization of minerals, preservation of the environment and increase of the value added for mining products by giving a marked impetus to their industrial processing.

(f) To promote the sectoral and regional articulation of mining activities by linking them up with the other sectors of the economy;

(g) To concentrate resources and efforts with regard to mining prospection and exploration in joint action at the regional level in order to achieve self-sufficiency in the region through specialization in production and an increase in intraregional trade .

/7. It

7. It was suggested that the main lines of action should include:

(a) Concentrating in specialized centres the existing information on current inventory of the mining reserves and resources of the region;

(b) Carrying out multiple correlation analyses to select objectives and geographical areas in a priority programme of mining prospection and exploration;

(c) Planning and executing a regional programme of mining prospection and exploration;

(d) Arriving at forms of international co-operation for the execution of investments and technological adaptation, possibly through forms of association (joint ventures), enabling the product to be directed both to the regional and the international market;

(e) Drawing up a rational exploration programme, designed to avoid the waste of resources, through the creation of multinational and multidisciplinary geological teams which would concentrate on the exploration of products in short supply, thus preventing the dispersion and squandering of the meagre resources available.

8. There are various international bodies, among them ALADI, JUNAC, ECLAC, IDB, OAS and the World Bank, which promote mining research and development. Financial restrictions are one of the main obstacles to the development of these activities.

9. It was pointed out that resources to meet the growing financial needs could be obtained by means of direct credits from governments, from agencies for technical and economic co-operation or through foreign equity capital.

10. As an alternative to the intensification of geological research and prospection to determine new resources and reserves it was stated that in the present circumstances, in view of the high cost and risk that research and prospection entail the supply of minerals and the need to incorporate value-added into the basic resources and to increase the employment of labour, it would be preferable to promote investment in industrial activities, producing semi-processed and finished goods for domestic, regional and even extraregional consumption. In this way, the available deposits could also be preserved, exploiting them to the full under better market and price conditions.

/Possibilities of

(c) To gain access to technical and financial assistance from the industrialized countries and the specialized institutions existing there for these purposes;

(d) To set up a regional geological and mining research institute to carry out pure and applied research in the areas of prospection exploration and metallurgy. This institution could become an instrument for the integration of the mining sector and attract technical assistance, horizontal and international co-operation, and investment to the Latin American mining sector;

(e) To seek alternative sources of technology transfer for the enterprises of Latin America in small and medium-sized companies in the industrialized countries. This would be advantageous for the negotiations of the receiving countries because of the characteristic spirit of these small and medium-sized enterprises, which would result in a better contribution to the efforts of the host country.

Horizontal co-operation in the mining and metallurgical sector

13. Special reference was made to the importance of the Latin American Mining Organization (OLAMI), among whose main functions would be the identification of concrete projects, using the following instruments: (i) private and State agencies with technological and financial capacity; (ii) the adaptation of mining policies and of the legal framework of the different countries harmonization of policies with the proposals of the integration agencies, (iii) more active participation by ALADI, CARICOM, JUNAC, ECLAC, SELA, IDB, and the World Bank in the development of specific projects and programmes of mining co-operation; (iv) external bilateral and multilateral co-operation in support of horizontal co-operation initiatives; (v) promotion of horizontal co-operation at the regional and extraregional level, coupled with an adequate interchange of institutional experiences in the techno-scientific and management fields.

14. It was stated that complementation might be the most viable form of horizontal co-operation and that to achieve this it would be neccessary to create incentives for investment in this field, for which intergovernmental or ministerial agreements would be required.

15. The creation of a regional Mining Development Bank was suggested with a view to promoting medium-sized and small enterprises, the opinion being that such an institution is indispensable for the development of these strata of production.

/Investment and

Investment and development promotion policy, sources and forms of financing

16. The following aspects were emphasized:

(a) Despite the current difficulties of the mining sector, its long-term prospects are promising because of its exceptional resource endowment and marked competitive advantages;

(b) Increasing investment in the sector is a notable challenge in the existing situation, owing to the severe economic and financial crisis in the region, its high external indebtedness and the uncertainties concerning the international market;

(c) The possibilities of investment in Latin American mining depend also on the policies of the developed countries, the behaviour of the transnational mining companies and the world balance of supply and demand in minerals so that a widespread consensus and active collaboration are called for from all the interested parties, both at regional and international level;

(d) The external financing available from numerous sources will continue to be a key factor in Latin American mining development, although it would also be necessary to stimulate a greates contribution from national funds;

(e) The foreign finance needs projected for the mining sector do not exceed the capacity of the international financial system nevertheless, in view of the regional financial crisis special efforts will be called to stimulate a greater contribution of risk capital, in order to facilitate the mobilization of the credit resources required. The multinational development bodies could assist in this task by co-financing and other promotional measures;

(f) The factor of instability and political risk is a hindrance to the granting of credit by international financing enterprises, so it is necessary to minimize these risks by governmental agreements at the regional level.

17. Among some of the possible ways of maximizing interest in the development of the sector and reducing risks, the following were suggested:

(a) Attempting to disminish risks by creating an insurance corporation or mechanism in order to reinforce investment flows in the region, such as, for example, a regional

(b) Organizing

(b) Organizing programmes for the preparation of permanently updated profiles of investment opportunities;

(c) Paying special attention to efficiency and better corporate management in Latin American mining development;

(d) Recommending follow-up action on projects by the sectoral bodies directly involved, with the help of entrepreneurs and financial institutions;

(e) Examining more carefully the effective contributions of foreign investment(although this is considered necessary for Latin America),perhaps by the creation of negotiating bodies with experience in handling these matters. Foreign investment should bring with it a bigger technological and tra training contribution at the national level.

(f) Seeking joint participation by the State and the transnational corporations in order to reduce the political and economic risk in mining investments by including clauses to safeguard the interests of both parties. The projects could be made more profitable by setting up joint ventures with vertical integration.

18. It was recommended that the aims of medium and long-term investment in the region should be:

(a) To restructure the mining and metallurgical industry of the region to prevent its becoming obsolescent or outdated vis-a-vis the industrial revolution currently in progress, which affects all mining and metallurgical products, but particularly those of the periphery;

(b) To increase the degree of industrial processing achieved in the mining and metallurgical sector of the region and to further its articulation with the rest of the industrial system, in the framework of industrial complementation agreements, under existing schemes of regional co-operation and integration;

(c) To diversify export markets, especially towards the developing countries themselves renewing joint efforts in the fields of marketing and price determination;

/(d) To

(d) To actively explore the points of common interest with the transnational corporations and governments of the industrialized countries most particularly those dependent on mining imports acknowledging the existence of divergent interests, but with the aim of establishing stable and mutually respectful and advantageous relations.

Role of the public and private sectors in the development of the Latin American mining sector

19. Regarding the interaction of the transnational corporations with the public and private sector in the context of horizontal co-operation, it was proposed to establish a working group composed of representatives and experts of the interested governments of Latin America and the European Economic Community, and of their public and private enterprises. With the support of international organizations, such a group could formulate guidelines for making feasible action relating to studies and the exchange of information, organization and methods of management of public, private and mixed enterprises with the participation of the transnational corporations, in the mining and metallurgical sector; co-operation and agreements between the public sector and the transnational corporations, with particular enphasis on subjects of reciprocal interest and mutual advantage; divergencies and controversies between the public sector and the transnational enterprises in specific important fields, such as the financing of projects, ownership and management of joint ventures, taxation and incentives; modes of national integration of mining projects, etc; and participation of the transnational corporations in the regional co-operation of the mining countries, particularly in the possible establishment of joint Latin American operations and enterprises for the processing and marketing of minerals and metals.

20. With a view to developing public and private mining enterprises it was suggested that action be taken:

(a) To promote and develop regional and extraregional markets, thus ensuring greater financial returns and an equitable share in the growth of the markets;

(b) To create tax incentives for enterprises that invest in the promotion and development of markets and to seek to further the setting up of education and training centres for the mining producers of Latin America, whose financing might come from extraregional sources;

/(c) To

(c) To stimulate meetings between mining producers of different countries which might help to improve the transparency of the markets and the provision of timely information on production investment plans and the demand of the users;

(d) To pay more attention to the international tariff structure and to achieve through GATT more equitable treatment for processed and semi-finished products from Latin America and other developing regions.

Possibilities for regional and inter-regional complementarity within the mining, metallurgical and metal working industry (Agenda item 3)

Vertical integration options for Latin American mining

21. It was noted that:

(a) The progress made in the supply of mining products with greater value-added suggests the desirability of strengthening mechanisms to stimulate regional interchange and prevent vulnerability vis-a-vis other regions of the world. This could be achieved through a detailed analysis of stocks and the complementation of mineral and energy resources;

(b) The existence of expanding metallurgical production and idle capacity in the metal products and machinery manufacturing sector, together with the experiences of some countries in metalworking and industrialization underline the interest and desirability of extending mutual trade, technical co-operation and industrial integration in the mining and metallurgical sector of Latin America;

(c) Emphasis should be placed on the importance of firm and decided political will and governmental action to foster joint initiatives in the fields of State action, and particularly to set up stable mechanisms to stimulate and generate co-operation and integration among different enterprises of the private and public sectors in the areas of research, production, engineering and trade;

(d) Vertical integration in the mining sphere could lead to reactivation and acceleration of the industrial sector of the region, the creation of jobs, trade benefits and market diversification, greater profitability and generation of surpluses, saving of foreign exchange and improvement of the capacity for consumption of manufactured goods at the regional level, to which end it is highly recommendable to

/increase the

increase the lines of communication between the Latin American countries in order to try to integrate their consumer markets by improving intraregional trade and horizontal co-operation.

22. As examples of some strategies for vertical integration, mention was made of the possibility of negotiations involving the national enterprises of the region and the European Economic Community, which might include the following elements:

(a) The creation of joint ventures between Latin American national enterprises and some processing enterprises currently operating in Euripe, which, would establish in Latin America units for processing and finishing certain lines of semi-manufactures;

(b) The complementation of entrepreneurial agreements with governmental agreements providing for an appreciable expansion of the quotas established in the Generalized System of Preferences for the lines of products to be manufactured in Latin America;

(c) The intention would be declared of ensuring the supply of raw materials as a counterpart for the inclusion in that supply of a certain proportion of semi-manufacture. This would be carried out through trade flows between enterprises situated in the two regions having ties of mutual interest, under the proctection of the amplified quotas of the Generalized System of Preferences. The current crisis situation of the mining industry could be an appropriate background for measures of this type.

23. With regard to the development of the sector it was suggested that:

(a) Governments should provide the basic infrastructure, prepare studies of available resources, and foster a favourable climate for investment, while it should be the responsibility of enterprises to look for new opportunities, evaluate and assume risks, act with decision and discipline, carry out or stimulate the execution of training activities.

(b) The development of the non-metallic mining sector should be increased in accordance with the evolution of regional and international markets.

(c) ECLAC and ALADI, in conjunction with the EEC, should implement measures to stimulate regional integration and contribute to the creation of more favourable conditions for the vertical integration of the mining and metallurgical sector, in collaboration with other regional organizations.

/(d) The

(d) The establishment of permanent relations between mining entrepreneurs should be fostered by means of periodic meetings of working groups which would enable them to remain in close contact in order to establish better conditions of production and marketing, strengthen the financial support structure, and deal with other matters conducive to the internal and external growth of mining enterprises and of their technical and labour support teams.

Supply and demand for capital goods in the Latin American mining sector

24. Particular emphasis was laid on the following:

(a) The growing importance of the demand for mining machinery and equipment in Latin America and the volume and type of capital goods and equipment required, mostly imported from abroad. Some of these could be produced regionally to meet the needs of Latin America, reduce the deficit on the balance of payments and save foreign exchange, while also creating economic and industrial activity for the benefit of broad social sectors of the respective countries;

(b) The necessity and possibility of increasing the number of financing programmes for research, promotion and production of capital goods and equipment in the region. Some agencies financing co-operation and development, such as the IDB and the World Bank, have specific programmes with these objectives which are available to the countries and in some cases are already operating in the region.

/III. CONCLUSIONS

III. CONCLUSIONS AND RECOMMENDATIONS: SOME FOLLOW-UP ACTIVITIES 3/

25. Within the framework of the concepts which prompted the holding of the Workshop --of the objectives and topics analysed-- two basic premises were adopted which might make follow-up action possible:

(a) There are significant opportunities for the various actors in the mining industrial sector to carry out joint and complementary activities. These could be executed at both intra-regional level and interregional --between Latin America and the EEC countries. Pooled activities of this kind would permit the participation and co-operation of the various actors in the mining-industrial sector of the European Economic Community (EEC) countries and those of Latin America, to their mutual benefit.

(b) For catalyzing these joint and complementary activities, mechanisms need to be set up which would necessarily have to rely on the initiative and support of the regional technical and economic co-operation agencies, both multilateral and bilateral, in Latin America and Europe.

26. For the practical pupose of initiating follow-up action, three groups of actors were identified, among which new interrelationships may be promoted:

(a) Actors in the areas of: documentation and information services for the mining-industrial sector, geological studies and research, market studies, and education and training.

(b) Enterprises --public and private, national and transnational-- engaged in the production and marketing of raw materials of mining origin and manufactured goods, including capital goods for for mining extraction and mineral processing, and enterprises supplying inputs for the mining and metallurgical industry.

(c) Actors responsible for formulating and implementing national, regional and subregional policies for the mining and metallurgical sector.

27. Mechanisms for promoting complementary activities among these actors could be the following:

- Considering that horizontal co-operation is an appropriate mechanism for increasing complementation, a start should be made on the exploration of intra-regional co-operation opportunities, in Latin America and the Caribbean, as an activity prior to the study of possibilities for interregional co-operation with EEC countries.

/The holding

- The holding of meetings among the pertinent actors might constitute one of the appropriate mechanisms for delimiting specific fields of complementary action.

- The technical base for these meetings would comprise brief documents, made up of extracts from earlier studies, co-ordinated by one or more regional institutions, which would serve as a frame of reference to enable the actors to select priority options, determine the successive stages and put their decisions into practice.

- Technical and financial support from regional institutions, and from international, bilateral or multilateral agencies in both regions, would be required in order to carry out the studies and convene the programmed meetings.

Proposed activities

Group 1: Documentation and information services for the mining-industrial sector

28. The development of the mining sector in Latin America will largely depend on the following factors: (i) More investment in prospecting and exploration in order to gain further knowledge of reserves and diversify production to include minerals in greater demand, along with fuels (coal and radioactive minerals), taking particular account of international costs in terms of exploitation, production and investment; (ii) mobilization of capital and entrepreneurial capacity, mainly for medium-sized and small enterprises engaged in the exploitation and processing of these minerals; and (iii) increased efficiency in the production and marketing of the traditional minerals. In this area a wide range of proposals was analysed regarding intra-regional horizontal co-operation with a view to strengthening market studies and geological research, as well as training and information systems.

Proposal I

29. To establish a programme for progressively enlarging and unifying the information base available to the mining sector in Latin America, through systematic co-operation, interaction, and the strengthening of the information and documentation centres by similar institutions in the EEC countries. Areas with high priority and viable prospects are intra- and interregional co-operation in geological studies and the elaboration and diffusion of information on markets, investment, production, consumption and prices of minerals and related products.

/Group 2:

Group 2: Enterprises in the mining-industrial sector

30. Given the present economic situation, characterized by a slump in demand for primary products in international markets, the main avenues through which the mining sector could contribute to Latin American development appear to be the following: (i) diversification of production; (ii) increased efficiency in order to reduce production costs and ensure more effective marketing; (iii) achievement of a higher value-added through considering the international market trends and opportunity cost; and (iv) the demand generated by the mining sector for capital goods and other inputs. The first avenue entails investment in exploration and development; the second depends on the transfer of technology and on technical and management know-how; the third rests on a greater vertical integration through forward linkages with the industries using mineral inputs, and the fourth seeks the same end through backward linkages with capital goods and other products used by the mining industry.

31. Latin America's increasing relative importance in the world market for minerals and capital goods for mining and manufactures suggests the need to explore the possibilities of intra- and regional joint ventures with a two-way investment flow, thus strengthening the capacity of Latin American enterprises to respond to price signals in regional and international markets.

32. In this connection, several other propositions were put forward, such as: the creation of mixed enterprises for the marketing of minerals; the establishment of mechanisms for regular interchange of information, covering management practices and other pertinent activities, among medium-sized and small enterprises; the creation of a working group integrated by national and transnational enterprises and by government agencies in Latin America and in EEC countries, for the purposes of examining investment incentives and opportunities with a view to vertical integration; and organization of groups of selected enterprises aimed at defining specific areas for complementary vertical activity within Latin America and between enterprises in Latin America and the EEC countries. It was considered that this last proposal offered the best prospects of application in the short term for the attainment of interregional co-operation objectives.

Proposal II

33. The regional agencies of Latin America and the EEC countries should initiate integral studies of specific minerals with special emphasis on those of Latin America, in order to achieve their vertical integration with manufacturing industries, linking them to the government policies for the mining industrial sector. The aim of this research would be to determine the processing outlook for certain "actors" and achieve an advantageous and harmonious development for the respective countries through complementary

/activities,

activities, especially in fields of vertical integration, interrelationship with the entrepreneurial sector and the co-ordination of the latter with national and regional policies. On the basis of this systematic review of the situation in both regions, the regional agencies, in co-ordination with the institutions concerned, could organize a series of meetings of the relevant "actors" and carry out the follow-up resulting from the findings and action proposals emanating from these meetings. Preliminary suggestions of areas deserving priority attention include: improved efficiency and transparency in the marketing of minerals between Latin America and Europe; increased development of non-metallic minerals in Latin America; vertical integration into the industrial processing of selected metallic minerals both at the interregional and intra-regional levels; promotion of the industries manufacturing capital goods and other intermediate or final goods in Latin America; and the reinforcement of the role of small and medium-sized enterprises in the Latin American mining-industrial sector.

Group 3: National and regional policies for mining and metallurgical development

34. The formulation and application of a mining-industrial policy co-ordinated both within the Latin American countries and jointly with those of the EEC is crucial for the evolution of trade and development in these sectors in both regions. Special importance should be attached to credit and financing conditions, the investment climate and incentives, the role of small and medium-sized enterprise, opportunities for co-ordinating policies among the Latin American countries and possibly with the EEC countries, and the establishment of a smooth and permanent dialogue between the enterprises involved, including those responsible for the formulation and application of policies for the sector in the countries and agencies of both regions.

35. Over the next five or ten years, small and medium-sized mining enterprises are expected to play an increasingly important role in Latin America. These enterprises are generally in a better position than large organizations to cope with market risks owing to their greater flexibility and lower fixed investment per unit of output. Even so, there are a number of obstacles to the definition and implementation of policies for development of the small and medium-sized mining sector owing to its heterogeneous and fragmented character. In moving towards suitable policies for these, it will be necessary to provide credit lines and technical assistance in support of attractive projects in the subsector. In line with this approach, horizontal co-operation and programmes of international financing institutions should be reoriented to meet the specific needs of small and medium-sized enterprises in urgent need of this support.

36. In this subsector the non-metallic minerals, directed mainly towards domestic markets such as the construction industry, offer good prospects of development.

/Proposal III

Proposal III

37. The regional agencies might examine the existing state of knowledge of planning and of policy formulation and execution in the mining sector of Latin America. On the basis of this review and of experience gathered from the meetings contemplated under proposals I and II, the regional agencies might convene meetings of "actors" from the public and private sectors to examine opportunities for complementary action or horizontal co-operation in priority areas such as: financing sources and conditions, energy supply costs to the sector, comparative studies of mining codes, investment guarantees and arbitration procedures; price, tax subsidizing and tariff policies; specific promotion of small and medium-sized enterprises; and the role of public, private and mixed enterprises in the region.

Notes

1/ See annex 1

2/ See the list of documents in annex 2

3/ Out of these proposals those will be adopted which appear more likely to succeed in the short run.

/Annex 1

Annex 1

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Annex 2

LIST OF DOCUMENTS PRESENTED AT THE WORKSHOP

1. Programme.

2. Provisional agenda (LC/R.387 (Sem.19/1)).

3. Annotated provisional agenda (LC/R.388 (Sem.19/2)).

4. The role of the public sector and transnational corporations in the development of mining in Latin America (J. Kñakal, LC/R.376 (Sem.19/3)).

5. Financing implications of mineral development agreements: Some notes on recent mineral agreements in South America (Thomas Wälde, LC/R.377 (Sem.19/4)).

6. Demand for machinery and equipment by the metal mining industry in some countries of Latin America (LC/R.379 (Sem.19/5)).

7. Main systems of marketing minerals and metals (Pedro Zilveti, LC/R.380(Sem.19/6)).

8. Cooperación horizontal en el sector minero-metalúrgico de América Latina (C. García, LC/R.382 (Sem.19/7)).

9. Options of vertical integration of mining in Latin America (G. P. Salas, LC/R.383 (Sem.19/8)).

10. Algunas reflexiones sobre las opciones de integración vertical de la minería en América Latina (J. L. Mardones, LC/R.384 (Sem.19/9)).

11. Profile and possibility of a multinational ore marketing enterprise: The case of Latin America (F. Sánchez A., LC/R.385 (Sem.19/10)).

12. Investment promotion and financing of mining in Latin America (J. Ruiz Lara and R. Magloire, LC/R.386 (Sem.19/11)).

13. Experiencias y perspectivas de desarrollo tecnológico e industrial conjunto en el grupo andino y su relación con el sector minero-metalúrgico (C. Aguirre and W. Neves, LC/R.394 (Sem.19/12)).

14. Possibilities for increasing regional trade in metallic minerals and metals (M.L Bohomoletz, LC/R.390 (Sem.19/13)).

15. Organismo Latinoamericano de Minería (OLAMI). Consideraciones sobre su creación y aportación futura al desarrollo minero-metalúrgico de América Latina (C. Diez V., LC/R.392 (Sem.19/14)).

16. Technical assistance and technology transfer in the Latin American mining and metallurgical sector (Martin Kürsten, LC/R.393 (Sem.19/15)).

17. Possibilities for the diversification of mining sector production, complementarity and integration in Latin America (Division of Natural Resources and Energy, ECLAC).

18. El papel del sector público y las empresas transnacionales en el desarrollo minero de América Latina (J. Kñakal, resumen).

19. Los roles del sector privado y del sector público en el desarrollo minero-metalúrgico de América Latina (comentario de F. González Vigil, UNCTC).

20. Opciones de integración vertical del sector mineral en América Latina (O. Euler de Castro).

21. Articles of Association of the Latin American Mining Agency.

22. Record of the meeting held to adopt the Articles of Association of the Latin American Mining Agency.

23. Report of the meeting on horizontal co-operation for the development of the mineral resources of Latin America (E/CEPAL/G.1207, 27 July 1982).