

Consulting

Disbursements to Canadian firms for supply of "consulting" work continues to strongly increase. While WB total disbursements for consulting work decreased by 7% in FY'89, Canada's share of these disbursements was \$54 million, or 9.1% of the total. This represents a 12.5% increase over last year, placing Canada in fourth position behind the U.S., UK, and France. Canadian consulting results have consistently increased over the past five years while such major competitors as the .S., U.K., Italy and Japan have declined significantly.

It should be noted that disbursements for consulting still constitute a relatively small portion of Bank funded business, averaging only 5% of foreign disbursements over the past few years. Also, the total consulting "pie" has been shrinking even further, primarily as a result of improved borrower capabilities in this area, and an increase in the amount of technical assistance being funded by bilateral agencies.

Goods and Equipment

Disbursements for goods and equipment represent the lion's share of World Bank funding, and amounted to \$8.6 billion in foreign disbursements in FY'90 (86% of the total).

The Bank distinguishes between "goods" and "equipment" in its procurement statistics. Goods are considered to be those items that cannot be classified as machinery or hardware, such as agricultural inputs (fertilizer, seeds, livestock), medical supplies, construction materials, wire and cable, textbooks, paper, etc.

Canadian firms received \$71 million for the supply of "equipment" in FY'90, an increase of 34% from FY'89. However, in the "all other goods" category, Canadian firms received \$74 million, which was a significant decrease from the \$133 million enjoyed by Canada last year.

Civil Works

Faced with increasingly stiff competition from the LDCs themselves (particularly in Asia), Canadian firms continue to show modest results in civil works contracts, receiving \$5 million in FY'90, or 1% of WB total foreign disbursements for civil works. This compares with \$9 million last year. However, funding of civil works represented only 5.3% of WB foreign disbursements last year, considerably less significant than the goods and equipment market. {Exhibit 4 lists disbursements to Canada by description of service for the period FY'87 - FY'90.}