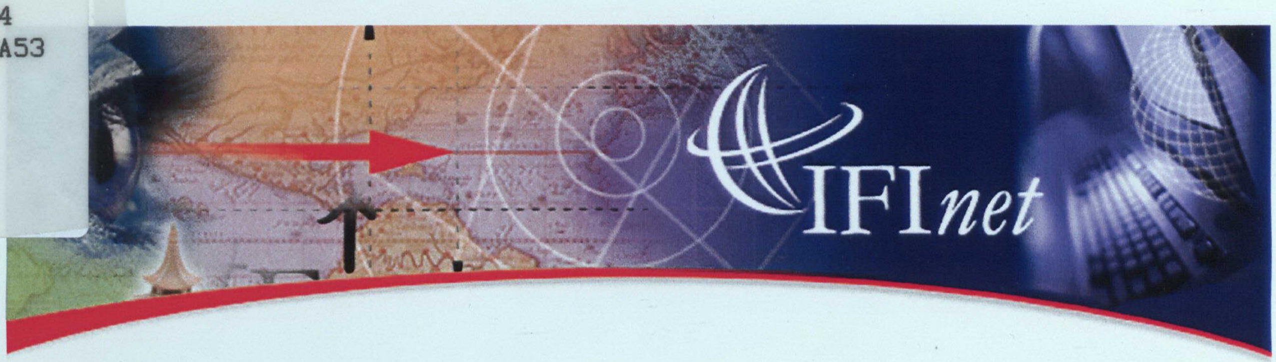

Analysis of International Financial Institution Contract Awards Data for Canada 1994-1998 : Summary of Results

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1 Introduction

Canada's responsibilities as a shareholder at various International Financial Institutions (hereafter IFIs), are accompanied by opportunities. Ostensibly, Canada is able to influence the priorities and operations of the individual IFIs, as they pursue the overarching goal of poverty reduction in developing countries. Secondly, Canadian companies are able to compete for procurement that results from the lending of these institutions. The latter suggestion has stimulated a contemporary analytical study, to offer a quantification as well as a qualitative analysis of Canada's participation in this competition for procurement opportunities.

The International Financial Institutions Unit of the Export Financing Financing Division (TBF) of the Department of Foreign Affairs and International Trade (DFAIT), has assembled a database of Canadian Contract Awards associated with lending by the World Bank (hereafter the WB), the Inter-American Development Bank (hereafter the IDB), the African Development Bank (hereafter the AFDB), the Asian Development Bank (hereafter the ASDB), and the Caribbean Development Bank (hereafter the CDB) between 1994 and 1998, which data forms the basis for the current analysis. In addition, some contract awards financed by the Canadian Consultant Trust Funds (hereafter CTFs), funded by CIDA, and placed with the IFIs has been collected and discussed.

This document presents a summary of the key findings of the study of the database of 1994-1998 contract awards data for Canada, spanning the five IFIs, and highlights results that are relevant in light of policy objectives aimed at increasing the number scope and variety of procurement opportunities awarded to Canadian companies. As a summary document, this paper excludes much of the data from which these results have been generated, as well as a discussion of the nature and faults of the data itself. A full report detailing these issues is also available.

2 Methodology

A database of Canadian contract awards at five IFIs from 1994-1998 was created by TBF over the winter of 1999-2000, using recent data generated by the procurement reporting units of the WB, IDB, AFDB, ASDB, CDB. Reporting procedures and adherence to reporting procedures on contract awards by borrowers do not ensure that the IFI lists are complete for some time after the contract award period has passed, if ever. By using the most recent reports available from the IFIs, TBF was able to include contract awards information that may have 'trickled in' to the procurement reporting units over the past several years, allowing for a more comprehensive analysis than has been possible in the past. Likely omissions, coupled with the late end of the WB reporting year (June 2000), for example, led to the exclusion of 1999 data from the analysis, in line with the goal of reviewing only the most thoroughly vetted information.

In spite of best efforts, several of the IFIs were unable to provide a data set for 1994 (AFDB, ASDB, CDB). In addition, CDB data was unavailable for 1995 and 1996. **A careful review of the relevant subsets of the data, however, has confirmed that the general conclusions drawn across the database as a whole are robust.** This in part is attributable to the dominance of contract awards with the WB alone, from any view.

Wherever relevant to the analysis, data pertaining to procurement and contract awards with the IFIs generally, from a variety of sources, has been consulted. This includes the skeletal data available regarding contracts financed by the CTFs. This information, as of inconsistent quality and completeness, remains peripheral to the core analysis, however.

2.1 Population of Contract Awards Data

Contract awards data, is only representative of the population of contract awards and not a complete record. At the WB, for example, 55-65% of the contracts awarded by borrowers from 1994-1998 using funds generated by WB lending were subject to prior review by the bank, and therefore tracked by the procurement unit. This remains an adequately sizable portion of the population of data with which to perform the analysis; an argument that is strengthened by the fact that contracts not subject to prior review have historically likely been those of a small value, not administered under International Competitive Bidding (ICB), and awarded to suppliers local or regional to the borrower. This conclusion is confirmed by individual institution reports addressing contract awards.

Continuing along the same theme, a significant trend in lending by the IFIs, particularly the WB and the IDB, merits mention. Structural Adjustment Lending (SAL), or Sectoral Adjustment Lending (SECAL), designed to smooth macroeconomic adjustment is often quick-disbursing and borrowing countries are not required to subject resultant contracts to standard procurement rules. This type of lending constituted greater than one-third of new approved lending at the WB and

IDB in 1998, and so cannot be ignored. While the 'best guesses' of the IFIs, from borrowing country import statistics, suggest that Canadian suppliers may be benefiting substantially from this lending, the absence of contract awards data naturally excludes it from the study.

The pool of contract awards collected, includes only contracts awarded to lead contractors, and therefore does not in general address the issue of subcontracting for IFI-funded work. A detailed discussion of this issue is left for the report accompanying this summary. It is noted here, however, that data generated by two of the institutions provides an indication that some Canadian goods are likely being sold to lead contractors from other countries under these projects, but reciprocally, of course, that Canadian lead contractors are subcontracting to foreign firms under contracts stimulated by IFI lending.

3 Macro Analysis of the Data

More than 1200 contracts, resulting in just short of US$1.2 billion in contract awards were reviewed in the study. Lending of the World Bank funded greater than 65% of the contracts over the five year period, representing 70% of the value of all contract awards listed, followed by the ASDB with 16.2% of the contracts (8.6% of the value), and the IDB with 11.7% of the contracts (10.6% of the value).

Exhibit 3.0 Canadian Contract Awards by IFI, by Number and by Value, 1994-1998

	WB	IDB	AFDB	ASDB	CDB
Total Contracts	808	144	55	199	20
Share of Total Contracts (%)	65.9	11.7	4.5	16.2	1.6
Value of Contracts	$858 535 159	$126 838 238	$90 048 363	$102 473 994	$16 953 692
Adjusted Value of Contracts*	$553 709 240	$89 018 238	$47 413 317	$102 473 994	$16 953 692
Share of Value of Contracts (%)	71.9	10.6	7.5	8.6	1.4
Adjusted Share of Value of Contracts (%)	68.4	11.0	5.9	12.7	1.8

All values are stated in US$
* Adjusted totals reflect the removal of five extreme values or outliers that otherwise skew the results.

3.1 Share of World Bank Prior Review Contracts, 1994-1998

*Given the share of Canada's procurement that is generated by WB lending alone, it is notable that Canada's share of prior review contracts at the WB declined year over year from 1994-1995, remained steady in 1996, and declined in each of 1997 and 1998. The shares of all G-7 nations have also been declining, but Canada's drop in share of prior review contracts in 1998 relative to 1994 was **2-3 times as great** as the comparable change for any of the others.*

Even if 1994 is viewed as a high water mark, and removed from the data, Canada's drop in share in 1998 from 1995 was more substantial than for any nation other than the U.S. which experienced what appeared to be an extreme value in 1998 specifically. The shares of other G-7 nations (including the U.S., but apart from the U.K), have tended to oscillate while Canada's share (apart from a plateau in 1995-1996), has declined in each year.

3.2 Canadian Contract Threshold Values

Greater than 70% of Canadian contracts studied were valued at less than $500,000. More than 83% were valued at less than $US 1 million, and at least 98% were valued at less than US$5 million. Stated otherwise, 25 Canadian IFI-funded contracts between 1994 and 1998 were valued at greater than US$5 million, only 11 of which exceeded $US 10 million.

Exhibit 3.2 Threshold Values of Canadian Contract Awards, 1994-1998

Threshold Contract Values in US$	Number of Contracts	Percentage	Cumulative Percentage
>10 million	11	.9	100
5-10 million	14	1.1	99.1
2-5 million	83	6.8	98.0
1-2 million	94	7.7	91.2
500,000-1 million	157	12.8	83.5
<500,000	867	70.7	70.7
Total	1226	100	

<u>Outliers or Extreme Values</u>

Only 5 contracts represent one-third of the value of contracts earned and are individually at least twice as big as any other contract in the database. Three of these contracts alone (all earned in 1994), represent more than a quarter of the value of earnings in the database.

The year 1994 represented the high water mark for Canadians during the period studied, by value of contracts. The 15.7% of the database contracts, funded by either WB or IDB lending in that year represents 42% of the value of all contracts . Additionally, of the 11 contracts valued at greater than $US 10 million, more than half were earned in 1994 and only 3 were earned after 1995.

3.3 Average Value of Canadian Contract Awards, 1994-1998

For the larger data samples e.g. WB, IDB, the average value of Canadian contracts was low. With extreme values removed, the average Canadian contract with the WB was lower than the average value of bank contracts in each year. In 1998, for example, the average contract with the WB was well over $900,000, in comparison with Canada's figure of a little over $600,000.

The low average value of Canadian contracts in general reflects the dominance of service contracts over goods and equipment contracts in the Canadian portfolio. At the ASDB, the high concentration of Technical Assistance (TA) contracts further contributes to this result.

Exhibit 3.3 Average Value of Canadian Contract Awards, 1994-1998

Bank	1994	1995	1996	1997	1998
WB	$2 671 352 (*$792 796)	$829 766	$723 641	$525 170	$618 202
IDB	$2 280 503 (*$1 095 853)	$486 552	$728 541	$593 271	$132 104
AFDB	no data	$1 621 425	$536 593	$3 140 697 (*$497 959)	$362 420
ASDB	no data	$383 665	$360 816	$583 017	$752 943
CDB	no data	no data	no data	$351 470	$1 060 348

All values stated in US$
*Reflects removal of relevant outliers.

3.4 Median Value of Canadian Contract Awards

The low median value of Canadian contracts is striking. The figures for the IDB, for example, clearly reflect the relatively large proportion of individual consultants in the contractor data for that IFI.

Exhibit 3.4 Median Value of Canadian Contract Awards, 1994-1998

Bank	1994	1995	1996	1997	1998
WB	$202 740	$198 000	$248 806	$202 878	$206 160
IDB	$169 524	$144,571	$116,000	$140,000	$77 867
AFDB	no data	$797 564	$422 422	$512 968	$353 944
ASDB	no data	$214 718	$253 152	$285 347	$275 997
CDB	no data	no data	no data	$146 089	$110 338

Values stated in US$

4 Category of Sales: Goods and Equipment vs. Works vs. Services

Over the period from 1994 to 1998, approximately 80% of the IFI-funded contracts earned by Canadians were for sales of services, 18% for goods and equipment sales, and 2% related to civil works. The relative weightings of each category of sales are robust across all five IFIs. In addition, in 1997 and 1998, the proportion of Canadian contracts in the service category ***increased****, relative to that observed in the previous 3 years. In 1998, for example, service contracts represented a percentage of the total contracts for Canadians ranging from 84% at the WB to 92% at the IDB.*

These figures do not include the CTF contracts, which are service contracts and would only serve to confirm the dominance of services as a category of contracts for Canadians.

Exhibit 4-1 Contracts by Category of Sales, by IFI, 1994-1998

IFI	Category	1994	1995	1996	1997	1998
WB	Goods & Equipment	29 (18%)	48 (28.6%)	50 (27.8%)	14 (8.3%)	21 (16.9%)
	Services	125 (77.6%)	119 (70.4%)	124 (70.9%)	151 (89.9%)	113 (83.7%)
	Works	6 (3.7%)	1 (.6%)	1 (.6%)	3 (1.8%)	1 (.7%)
IDB	Goods & Equipment	7 (22.6%)	3 (8.6%)	4 (11.4%)	8 (29.6%)	2 (7.7%)
	Services	23 (74.2%)	17 (80.9%)	28 (80%)	27 (77.1%)	24 (92.3%)
	Works	1	1	3	0	0
AFDB	Goods & Equipment	no data	3 (15.8%)	2 (20%)	0	1 (10%)
	Services	no data	16 (84.2%)	8 (80%)	14 (87.5%)	9 (90%)
	Works	no data	0	0	2	0
ASDB	Goods & Equipment	no data	10 (22.7%)	23 (32.9%)	8 (17.8%)	5 (12.5%)
	Services	no data	33 (75%)	47 (67.1%)	37 (82.2%)	34 (85%)
	Works	no data	1 (2.2%)			1 (2.5%)
CDB	Goods & Equipment	no data	no data	no data	1 (16.7%)	0
	Services	no data	no data	no data	5 (83.3%)	12 85.7%)
	works	no data	no data	no data	0	1 (7.1%)

5 Who is Winning the Contracts? Canadian Corporate Representation

*The more than 1200 contracts between 1994 and 1998 were earned by **571 individuals, firms or consortia**. This total is comprised of **less than 550 unique or distinct companies**. The vast majority of the 75 consortia in the database were comprised at least one firm also contracting individually.*

5.1 <u>Contract earnings by Cohort of Firms/Consortia:</u>

The top 10 firms by value (either alone or as part of consortia) earned greater than 18% of the contracts, totalling 52.5% of the total value of contracts from 1994-1998. The top 250 firms earned more than 96% of the value of all contracts, 69% of the contracts by number. This means that 321 firms/consortia earned 31% of the contracts, with a combined value of less than 4% of all contracts recorded.

Exhibit 5.1 Value of Earnings by Cohort of Firms 1994-1998

Cohort of firms and/or consortia	Value of Contracts/ % of 1994-1998 value	Average Value of Earnings	Median Value of Earnings
Top 10 **171 contracts/13.9%** ***224/18.3%**	$576 733 352 (48.3%) *($627 771 604/**52.5%**)	$56 490 979	$22 860 153
top 20	$683 070 722 (57%)	$34 153 536	$15 179 044
top 50	$876 256 364 (73.3%)	$17 525 127	$8 079 447
top 100	$1 023 970 079 (85.7%)	$10 239 701	$4 485 420
top 150	1 094 693 221 (91.6%)	$7 297 955	$2 714 171
top 200	1 129 960 796 (94.6%)	$5 649 804	$2 042 946
250 *845 contracts/69%*	1 152 540 878 (**96.4%**)	$4 610 164	$1 352 039
Remainder (321) *381 contracts/31%*	$42 308 568	$189 725	$97 176

*adjusted to include all contracts and earnings earned by the top 10 companies as part of consortia that did not fall into the top 10

5.2 Multiple Contract Holders and 'Active' Contractors:

*Only **179** of the 571 firms/consortia in the database are listed more than once, i.e. earned more than one contract over the period 1994 to 1998. Of this 179, 58 earned only contracts on a single IFI-funded project. This means that **only 121 contractors were 'active' contractors** (active defined to mean contractors on diverse IFI-funded projects). Stated otherwise, only **20%** of Canadian suppliers to the IFI-funded 'market' from 1994-1998 were 'active' suppliers.*

Of the 179 multiple contractors, it is also noted that 23 held more than 10 contracts each, collectively representing 36% of the database total. The top 44 contract holders by number, in fact, (with more than 5 contracts each), earned 46% of all contracts.

5.3 Goods and Equipment, Services, and Works Suppliers:

*Earning 18% of the contracts in the database, goods and equipment suppliers represent almost a quarter of the firm or consortia entries. Service suppliers, earning almost 80% of the contracts comprise 75% of the contractors. However, **Canadian suppliers of services were more than twice as likely as the goods and equipment contractors to be 'active' contractors**. Stated otherwise, roughly 25% of all service suppliers are 'active' contractors, and represent 87% of the 'active' contractors listed. On the other hand, only 12% of all listed goods and equipment suppliers were 'active' suppliers from 1994-1998, and represent only 13% of the 'active' contractors.*

Goods and Equipment Suppliers:
There are 132 goods suppliers listed in the database, comprising 23% of the firm/consortia entries. Of this 132, only 44 are multiple contractors, and only 16 of this 44 are 'active' contractors with contracts on diverse projects. Therefore, **goods suppliers represent almost 25% of the multiple contractors in the database, but only 13% of the 'active' contractors.**

Service Suppliers:
Suppliers of **services, represent 75% of contractors, and 75% of multiple contract holders, but roughly 87% of the 'active' suppliers in the database**.

Works Contractors:
There are 13 works suppliers in the database, of which 5 are multiple contractors, crossing over categories to supply either goods or services on the projects associated with their works contract(s). **Thus, these 'active' contractors are captured in the preceding categories.**

5.4 Top Individual Contractors by Category:

Goods and Equipment Contractors:

***Only 19 goods and equipment contractors held more than two contracts**. As noted previously, of all goods suppliers, only 44 have more than one contract, and only 16 hold contracts on diverse projects. By way of comparison, of the 19 leading goods contractors listed below, only 8 have contracts on diverse projects, with 11 contracting on a single project. Therefore **50%** of the 'active' goods contractors did held only 2 contracts.*

Also remarkable is the fact that only 5 of the 19 leading goods contractors held contracts in **different countries**. Additionally, only 5 held contracts with more than one IFI, of which four worked with the WB and ASDB alone, one worked with four IFIs. Finally, 11 of the top 19 contractors worked on contracts funded by loans to the **Power sector**.

Exhibit 5.4.1 Top Goods and Equipment Suppliers, by Number of Contracts, 1994-1998

	Company/ Consortium name	Number of Contracts/ Number of Projects on which contracts	Country/ Countries	Year (s)	IFI	Sector(s) of Loan(s)
1	**Systeq Instruments Inc.**	13/8	China	1995 1996 1997 1998	WB, ASDB	Transport
2	**LPB Poles Inc.**	11/2	Bangladesh	1995 1996	WB, ASDB	Power
3	**Champion Road Machinery**	7/4	Cameroon, Egypt, Nepal, Paraguay,	1994 1995 1997 1998	WB, IDB, AFDB, ASDB	Transport
4	**Top-co Industries Limited**	7/3	Bangladesh, Pakistan, Russian Federation	1995 1996 1997	WB, ASDB	Power
5	**Dreco Energy Services Ltd.**	5/1	Russian Federation	1995 1996	WB	Power
6	**Aeronav**	4/1	Guyana	1996	WB	Public Sector Management

	Company/ Consortium name	Number of Contracts/ Number of Projects on which contracts	Country/ Countries	Year (s)	IFI	Sector(s) of Loan(s)
	Kumtor (Joint venture between Cameco Corp. and the Kyrg. Government)	4/1	Kyrgyzstan	1996	ASDB	Agriculture (Mining)
	Nanometrics*	4/1	Iran	1994, 1995	WB	Reconstruction
	T.A Global Service	4/1	Philippines	1995	WB	Power/Industry
7	**Cansoc**	3/2	Algeria, Senegal	1995, 1997	WB	Power, Other
8	**Computalog**	3/2	India, Haiti	1995, 1996, 1998	WB, ASDB	Power
9	**Enerflex Manufacturing**	3/1	Pakistan	1997, 1998	ASDB	Power
10	**Forenost Ind. Canada**	3/1	Pakistan	1996	WB	Power
11	**General Electric**	2/1 (goods) (+1 works- Ghana, 1997, WB)	China	1994	WB	Power
12	**Hydro Quebec/Vibec***	3/1	Haiti	1996	WB	Power
13	**Markham Electric Inc.**	3/1	Jamaica	1995, 1996	IDB	Power
14	**Sidus**	3/2	Algeria, Iran	1995, 1996, 1998	WB	Reconstruction, Education
15	**Societe d'Edition**	3/1	Mali	1994	WB	Education
16	**Transcontinental**	3/1	Burkina Faso	1996	WB	Education

* Nanometrics also held a service contract in Iran, under the same project.
In addition to its 2 goods contracts, GE included held a works contract in Ghana in 1997 (WB)
Hydro Quebec independently and in two other consortia, was involved in 14 other contracts

Of the top 20 goods and equipment contractors, by value, 17 only contracted in one country, and 16 contracted with a single IFI. Of the 3 firms contracting in more than one country, one spanned 3 regions, the other two two regions each. Additionally, the top three firms by contract numbers, only ranked 11th, 10th and 7th, respectively, in terms of value of contracts.
Note also the limited involvement of Nortel, with but 2 contracts from 1994-1998, valued at roughly $US 13.5 million. GE also held only a few contracts (3), but of much more substantial value.

Exhibit 5.4.2 Top Goods and Equipment Suppliers, by Value of Contract(s), 1994-1998

	Company/ Consortium name	Value of Contracts	No. of contracts	Country	Year	Bank	Sector(s)
1	**General Electric**	$140 335 117 (*$140 578 017)	2 (*3)	China	1994	WB	Power
2	**Dreco Energy Services Ltd.**	$23 810 354	5	Russian Federation	1995, 1996	WB	Power
3	**Hydro Quebec/Vibec**	$18 296 252 (*$32 967 587)	3	Haiti	1996	WB	Power
4	**Westinghouse Electric**	$14 322 000	1	Dominican Republic	1994	IDB	Power
5	**Gec-Alsthom-Mecanic Pes**	$14 023 000	1	Colombia	1996	IDB	Power
6	**Nortel**	$13 555 163	2	China, Russian Federation	1997	WB	Finance, Transport
7	**Champion Road Machinery**	$7 793 447	7	Cameroon, Egypt, Nepal, Paraguay,	1994, 1995 1997, 1998	WB, IDB, AFDB, ASDB	Transport
8	**Samit, SA**	$7 325 432	2	Argentina	1995	WB	Rural Develop.
9	**Enerflex Manufacturing**	$6 709 737	3	Pakistan	1997 1998	ASDB	Power
10	**LPB Poles Inc.**	$6 504 838	11	Bangladesh	1995, 1996	WB, ASDB	Power

	Company/ Consortium name	Value of Contracts	No. of contracts	Country	Year	Bank	Sector(s)
11	**Systeq Instruments Canada Inc.**	$6 127 875	13	China	1995, 1996, 1997, 1998	WB, ASDB	Transport
12	**Computalog Ltd.**	$4 924 126	3	India, Haiti	1995, 1996, 1998	WB, ASDB	Power
13	**T.A. Global Service**	$4 450 900	4	Philippines	1995	WB	Power/ Industry
14	**Maloney Industries Inc.**	$3 960 669	1	China	1997	WB	Power
15	**Loval Tunnel Equipment Inc.**	$3 920 193	1	Iran	1996	WB	Infrastructure
16	**Canac International Inc.****	$3 744 440 (*$7 872 644)	1 (**14)	China	1994	WB	Transport
17	**Canadax*** Technologies**	$3 700 297	1	Argentina	1998	WB	Education
18	**Consultronics**	$3 537 879	1	Hungary	1994	WB	Telecomm.
19	**Stone & Webber**	$3 503 143 (*$167 993 945)	2	Tanzania	1994, 1995	WB	Power
20	**Segitel/SI**	$3 442 146 (*$3 442 146)	1 (*2)	Tanzania	1995	AFDB	Telecomm.

All figures in US$.
* includes additional earnings from contracts in works or services categories, or in other consortia. In the case of Hydro Quebec/Vibec, includes additional contract earnings by Hydro Quebec.
**Canac International Inc. is primarily a service contractor with 13 service contracts in the database. It is unclear as to whether or not the designation 'goods' accurately describes this contract.
***Canadax is permanently disallowed from bidding on WB projects, as of June 2000.

__Service Contractors:__

Only 1 of the leading 18 service contractors held contract in all regions, with all IFIs (SNC Lavalin), 1 held contracts with 4 IFIs, 7 with 3, and the remaining 50% worked with either 1 or 2 IFIs alone. A little less than 50% of the top 18 worked in only 1 or 2 regions.

Exhibit 5.4.3 Top Service Contractors, by Number of Contracts, 1994-1998

	Company/ Consortium Name	Number of contracts /Value of Contracts	Country/ Countries	Year (s)	IFI	Sector(s) of Loan (s)
1	**SNC Lavalin***	57 (*87)	Algeria, Burkina Faso, Cameroon, Chad, China, Colombia, Cote D'Ivoire, El Salvador, Gabon, Georgia, Ghana, Guyana, Haiti, Honduras, India, Indonesia, Jamaica, Laos, Mali, Morocco, Nigeria, Panama, Philippines, Senegal, Trinidad &Tobago, Viet Nam	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB, AFDB, CDB	Agriculture, Infrastructure, Industry, Power, Transport, Urban Devel., Water/ Sanitation
2	**Tecsult**	37 (*48)	Algeria, Angola, Argentina, Bangladesh, Benin, Cameroon, Chad, Congo, Gabon, Guinea, Guinea-Bissau, Haiti, Laos, Madagascar, Mali, Niger, Togo, Venezuela	1994, 1995, 1996, 1997, 1998	WB, AFDB, ASDB	Education, Environment, Finance, Industry, Infrastructure, Power, Rural Development, Transport, Water/ Sanitation
3	**Agra**	21 (*30)	Algeria, China, El Salvador, Ghana, Haiti, India Indonesia, Iran Kyrgyzstan, Mali, Peru Thailand, Tonga	1994, 1995, 1996, 1997, 1998	WB, ASDB, IDB, AFDB (in consortium)	Environment, Industry, Power, Transport
4	**Acres**	18 (*25)	Bahamas, Bangladesh, China, Ghana, Jamaica, Tanzania, Uganda, Viet Nam	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Environment, Power

	Company/ Consortium Name	Number of contracts /Value of Contracts	Country/ Countries	Year (s)	IFI	Sector(s) of Loan (s)
5	**Hickling Corporation**	18 (*23)	Barbados, Jamaica, Indonesia, Kenya, Laos, Malawi, Maldives, Philippines, Sierra Leone, Tanzania, Uganda	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Education, Finance, Infrastructure, Public Sector Development, Social Sector Transport
6	**ND Lea**	17 (*20)	Albania, Barbados, China, India, Indonesia, Thailand, Trinidad & Tobago	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Transport
7	**CRC Sogema**	18	Algeria, Benin, Cameroon, Chad, Haiti, Lebanon, Madagascar, Mauritania, Senegal, Togo	1994, 1995, 1996, 1997,1998	WB, AFDB, IDB (in consortium with Dessau)	Education, Finance, Infrastructure, Population and Health, Power, Public Sector Management, Transport
8	**Berocan**	16 (*18)	Burkina Faso, Burundi, Central Af. R., Chad, Congo, Mali, Rwanda, Togo, Zaire	1994, 1995, 1996, 1997, 1998	WB, AFDB	Power, Transport
9	**Hydro Quebec**	13 (*17)	Angola, Burundi, China, Haiti, India, Indonesia, Laos, Morocco, Philippines, Rwanda	1994, 1995, 1996, 1997, 1998	WB, ASDB	Power
10	**ARA Consulting**	16	Bahamas, Barbados, Cambodia, Ghana, Nepal, Papua N.G. Trinidad & Tobago, Uganda, Viet Nam	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Industry, Private Sector Management, Public Sector Management
11	**CIDE**	16	Algeria, Benin, Cape Verde, Morocco, Tunisia	1994, 1995, 1996, 1997, 1998	AFDB, WB	Education

	Company/ Consortium Name	Number of contracts /Value of Contracts	Country/ Countries	Year (s)	IFI	Sector(s) of Loan (s)
12	**Roche**	11 (*15)	Argentina, Benin, Burkina Faso, Cote D'Ivoire, Ghana, Guinea, Guinea-Bissau Madagascar, Mauritania,	1994, 1995, 1996, 1997, 1998	WB, AFDB, ASDB	Industry, Environment, Population & Health, Rural Development, Water/ Sanitation
13	**Canac International**	13 (*14)	Brazil, China, Croatia, Kenya, India Indonesia, Madagascar, Mali, Tunisia	1994, 1995,1996, 1997, 1998	WB	Infrastructure, Transport
14	**WUSC**	14	India, Indonesia	1994, 1995, 1996, 1997, 1998	WB, ASDB	Education
15	**CECI**	11 (*13)	Bolivia, Comoros, Guinea, Mali	1995, 1996, 1997	WB	Education, Environment, Population & Health
16	**CPCS Transcom**	10 (*13)	Congo, Costa Rica, Indonesia, Jordan, Kenya, Mali, Malawi, Pakistan , Senegal, Tanzania, Togo	1994, 1995, 1997, 1998	WB	Transport, Public Sector Management, Private Sector Development
17	**Agrodev Canada**	11	Fiji/SI, Ghana, Mongolia, Pakistan, Thailand, Viet Nam	1995, 1996, 1997	WB, ASDB	Agriculture, Industry, Social Sector
18	**Regie Inc.**	11	Benin, Burundi, Central Af. R, China, Congo, Guinea, Pakistan	1995, 1996, 1997, 1998	WB, ASDB	Power, Private Sector Development, Public Sector, Public Sector Management

* includes contracts in consortia

Note that rankings in the services category change slightly when data is viewed by value of contracts earned, rather than number of contracts, but the substance is relatively unchanged.

Exhibit 5.4.4 Top Service Contractors by Value of all Contracts Earned 1994-1998

	Company/ Consortium Name	Value of Contracts	Country/ Countries	Year (s)	IFI(s)	Sector (s) of Loan(s)
1	**SNC Lavalin**	$92 958 752 (*$130 821 722. Service contracts alone: $46 040 683)	Algeria, Burkina Faso, Cameroon, Chad, China, Colombia, Cote D'Ivoire, El Salvador, Gabon, Georgia, Ghana, Guyana, Haiti, Honduras, India, Indonesia, Jamaica, Laos, Mali, Morocco, Nigeria, Panama, Philippines, Senegal, Trinidad &Tobago, Viet Nam	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB, AFDB, CDB	Agriculture, Infrastructure, Industry, Power, Transport, Urban Devel., Water/ Sanitation
2	**Acres**	18 (*25) $20 754 815 (*$32 578 382)	Bahamas, Bangladesh, China, Ghana, Jamaica, Tanzania, Uganda, Viet Nam	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Environment, Power
3	**Agra**	$17 598 603 (*$30 469 734)	Algeria, China, El Salvador, Ghana, Haiti, India Indonesia, Iran Kyrgyzstan, Mali, Peru Thailand, Tonga	1994, 1995, 1996, 1997, 1998	WB, ASDB, IDB, AFDB (in consortium)	Environment, Industry, Power, Transport
4	**Tecsult**	$21 909 951 (*$24 812 736)	Algeria, Angola, Argentina, Bangladesh, Benin, Cameroon, Chad, Congo, Gabon, Guinea, Guinea-Bissau, Haiti, Laos, Madagascar, Mali, Niger, Togo, Venezuela	1994, 1995, 1996, 1997, 1998	WB, AFDB, ASDB	Education, Environment, Finance, Industry, Infrastructure, Power, Rural Development, Transport, Water/ Sanitation

	Company/ Consortium Name	Value of Contracts	Country/ Countries	Year (s)	IFI(s)	Sector (s) of Loan(s)
5	**ND Lea**	$18 227 331 (*$24 548 934)	Albania, Barbados, China, India, Indonesia, Thailand, Trinidad & Tobago	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Transport
6	**ARA Consulting**	$16 036 088 (*$17 282 730)	Bahamas, Barbados, Cambodia, Ghana, Nepal, Papua N.G. Trinidad & Tobago, Uganda, Viet Nam	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Industry, Private Sector Management, Public Sector Management
7	**Hydro Quebec**	$14 671 335 (*$16 945 587 in services, $32 967 587 including goods)	Angola, Burundi, China, Haiti, India, Indonesia, Laos, Morocco, Philippines, Rwanda	1994, 1995, 1996, 1997, 1998	WB, ASDB	Power
8	**CRC Sogema**	$13 399 563 (*$13 942 743)	Algeria, Benin, Cameroon, Chad, Haiti, Lebanon, Madagascar, Mauritania, Senegal, Togo	1994, 1995, 1996, 1997,1998	WB, AFDB, IDB (in consortium with Dessau)	Education, Finance, Infrastructure, Population and Health, Power, Public Sector Management, Transport
9	**Hickling Corporation**	$8 062 791 (*$10 293 121)	Barbados, Jamaica, Indonesia, Kenya, Laos, Malawi, Maldives, Philippines, Sierra Leone, Tanzania, Uganda	1994, 1995, 1996, 1997, 1998	WB, IDB, ASDB	Education, Finance, Infrastructure, Public Sector Development, Social Sector Transport
10	**Delcan**	$10 002 854	Barbados, Malawi, Turkey, Venezuela	1994, 1997, 1998	WB, IDB, AFDB	Transport, Environment
11	**CIDE**	$8 403 612 (*$8 711 122)	Algeria, Benin, Cape Verde, Morocco, Tunisia	1994, 1995, 1996, 1997, 1998	AFDB, WB	Education

	Company/ Consortium Name	Value of Contracts	Country/ Countries	Year (s)	IFI(s)	Sector (s) of Loan(s)
12	**Canac International**	$7 123 203 (*7 872 644)	Brazil, China, Croatia, Kenya, India Indonesia, Madagascar, Mali, Tunisia	1994, 1995,1996, 1997, 1998	WB	Infrastructure, Transport
13	**Roche**	$6 000 589 (*$6 694 460)	Argentina, Benin, Burkina Faso, Cote D'Ivoire, Ghana, Guinea, Guinea-Bissau Madagascar, Mauritania,	1994, 1995, 1996, 1997, 1998	WB, AFDB, ASDB	Industry, Environment, Population & Health, Rural Development, Water/ Sanitation
14	**Wardrop Engineering**	$3 301 127 (*6 083 824)	Eritrea, Nigeria, Philippines, Sri Lanka, Uganda	1994, 1996, 1997	WB, ASDB	Agriculture, Infrastructure, Public Sector Management, Water/Sanitation
15	**WUSC**	$5 205 886	India, Indonesia	1994, 1995, 1996, 1997, 1998	WB, ASDB	Education

Values stated in US$.
* includes contracts as part of consortia.

Works:

Although works contracts represented nearly 25% of the value of all contracts earned from 1994-1998, it should be noted that several of the entries below are primarily service firms, that likely subcontracted to local construction firms for the actual civil works.

Exhibit 5.4.5 Top Works Contractors by Value 1994-1998

	Company/ Consortium	Number of Contracts	Value of Contracts	Country	Year	Bank	Sector of Loan
1	**Stone & Webber**	1 (*2)	$164 490 802	Indonesia	1994	WB	Power
2	**SNC Lavalin (Nig.)/SDS Hydrogeo**	2(*3)	$43 433 078	Algeria	1997	AFDB	Transport

	Company/ Consortium	Number of Contracts	Value of Contracts	Country	Year	Bank	Sector of Loan
3	**SNC Lavalin**	6 (*7)	$41 347 961	Guyana, Haiti, Jamaica, Trinidad & Tobago	1994, 1995, 1996, 1997	IDB, CDB	Power, Transport
4	**Henisa/ Consumers Gas**	1	$8 424 940	Brazil	1997	WB	Power
5	**unknown**	1	$8 089 893	St. Lucia	1998	CDB	Transport
6	**Carmacks Construction**	1	$5 465 879	Philippines	1996	WB	Transport
7	**SDS Hydrogeo Canada**	2	$3 241 820	Nigeria	1994	WB	Agriculture
8	**Nova Gas Internat'l**	1	$2 057 023	Indonesia	1998	ASDB	Power
9	**Titan Projects Limited**	1	$1 338 108	Bangladesh	1995	WB	Power
10	**SOGEA**	1	$912 056	Guinea-Bissau	1997	AFDB	Public Sector Management
11	**Tetrault, Blouin & Associes**	1	$751 914	Senegal	1994	WB	Education
12	**CECI**	1	$467 500	Guinea	1997	WB	Education
13	**Ong Prodeva**	1	$412 796	Burundi	1998	WB	Water/San.
14	**General Electric**	1	$242 900	Ghana	1997	WB	Power

All values stated in US$.
* contracts in consortia.

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
12	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
13	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
14	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
15	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Values stated in US$.

* Includes contracts as part of consortia.

Although works contracts represented nearly 25% of the [illegible] 1994-1998, it should be noted that several of the entries [illegible] likely sub-contracted local [illegible]

Exhibit 2.5 Top Works Contractors by Value 1994-1998

[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
1	Stone & Webber	1 (*2)	$164 490 802	Indonesia	1994	WB	Power
2	SNC Lavalin (Nig.)/SDS Hydrogen	2(*3)	$43 433 078	Algeria	1997	AfDB	[illegible]

6 Distribution of Canadian Contracts, by Region and Country

Between 1994 and 1998, 42% of the IFI-funded contracts earned by Canadians were in Africa, followed by 30% in Asia, 23% in Latin America and the Caribbean. By value of contracts, however, Asia dominates the analysis, with 42% of the value, followed by Africa with 26%, and Latin America with 23%. This result changes if a few 'extreme values' are removed, but nevertheless, ***the average Canadian contract in Asia between 1994-1998 was almost half again as big as its counterpart in Africa.*** *This is partly owing to the fact that a much greater portion of the contracts in Asia were goods and equipment over service contracts, relative to the other regions.*

Exhibit 6.0 Canadian IFI-Funded Contracts by Region, 1994-1998

IFI	Share of Contracts, by Number	Share of Contracts, by Value	Share of Contracts by Value* (*adjusted to exclude 5 extreme values)
Africa	42%	26%	33%
Asia	30%	**49%**	34%
Latin America and the Caribbean	23%	20%	25%
Europe	4%	4%	7%
Oceania	.5%	1%	1%

6.1 Regional Shares of Canadian Contracts with the World Bank, et. al

At the WB, 62.4% of the value of Canadian contracts earned was for work in Asia, though representing only 23.4% of Canadian contracts with that IFI. At the same time, 54.6% of the WB-funded Canadian contracts were in Africa, earning only 24.7% of the value of all contracts with the bank. Even once several extreme values are removed from the analysis, it is found that **the average Canadian contract in Asia associated with the WB was more than twice the size of its counterpart in Africa**. This is partly explained by differences in lending to the region, differing sectoral emphasis, and a concentration of Canadian goods contracts in Asia.

The average value of contracts with the WB is largest in Oceania, and almost as large in Europe. This result, however, is drawn from a very small sample and sample population. It can be stated that the preponderance of goods contracts, particularly in Europe is responsible for the relatively large average value, observed for the WB in that region.

Exhibit 6.1 Regional Split of Contracts by IFI, 1994-1998

BANK	AFRICA	ASIA	L. AMERICA and CARIB.	EUROPE	OCEANIA
WB	$222 206 455	$481 561 794	$93 631 330	$55 117 780	$10 611 423
	461 contracts	169 contracts	123 contracts	53 contracts	5 contracts
IDB			$126 838 238		
			142 contracts		
AFDB	$89,436,845				
	53 contracts				
ASDB		$98 310 904			$180 985
		199 contracts			1 contract
CDB			$16 953 692		
			20		
Total	**514 (41.9)**	368 (30.0)	284 (23.2)	54 (4.3)	6 (.5)
Total value	$311 643 300 (26.0%)	**$579 872 698 (48.5%)**	$237 423 260 (19.9%)	$55 117 780 (4.6%)	$10 792 408 (.9%)
Adjusted Total*	$268 861 535 (33.2%)	**$275 046 779 (33.9%)**	$199 603 260 (24.7%)	$55 117 780 (6.8%)	$10 792 408 (1.3%)
Average contract value	$606 310	$1 575 741	$833 064	$1 399 958	$1 798 735
Average contract value (using adj. total)	$524 096	$757 705	$700 362	$1 399 958	$1 798 735

* adjusted to exclude 5 extreme values, totals in US$

6.2 Detail of Canadian Contracts by Category, by Region:

Africa:

In spite of the fact that 41.9% of the contracts in the database were in this region, only 25% of the goods contracts were in Africa. By way of contrast, 46% of Canadian contracts for services were in Africa. In fact, services represented 87% of the contracts earned by Canadian firms or consortia in Africa.

Only 11% of the contracts earned in Africa were for goods and equipment, in contrast to a database wide figure of 18% in this category. On the other hand, 37 or 28% of the goods contractors in the database were represented in Africa. Of this 37, only 17 held more than one contract, and but 10 were 'active' contractors. In fact, 4 of this 10 were actually dominantly **service** suppliers, with the goods contracts corollary to their service contracts on specific projects. Two others of this 10 were also works contractors.

In contrast, while service contracts represent approximately 80% of the contracts in the database, they represent 87% of the contracts in Africa. These contracts were earned by 182 different suppliers, 30 of them consortia, or 40% of the consortia in the database.

Of the 182 service contractors working in Africa from 1994-1998, 34% were 'active' contractors. This is in stark contrast to the pure goods contractors in Africa, already a small group, of which only 16% were 'active'. **Therefore, service contractors in Africa were more than twice as likely to be contracting on multiple IFI projects either within the region or elsewhere.** In both the service and goods categories, however, the level of regional crossover was high. Of the 10 'active' goods contractors, 8 held contracts Latin America and/or Asia. In the service category, 37% also held contracts in Latin America, 29% in Asia, and at least 16% held contracts in Africa, Asia, and Latin America.

Asia:

Of the top 100 contracts by value, nearly 50% were in Asia, vs. 26% in Africa, vs. 21% in Latin America. This is in part a result of the fact that almost 50% of all goods and equipment contracts in the database were in Asia, as contracts in this category tend to be of higher value than service contracts. Only 25.7% of the service contracts in the database were in Asia, in spite of Asia's 30% share of all contracts.

Although the share of goods contracts in Asia was relatively high, representing 30% of all contracts in Asia, several caveats should be mentioned. Goods were sold in only 10 countries, while services were sold in 19 countries in Asia. Additionally, while 48% of all goods suppliers held contracts in Asia, only 10 of these contractors or 16% were 'active' contractors. This means that while nearly 63% of the small number of 'active' goods contractors were positioned in Asia, **the same percentage of goods contractors in the region were 'active' as were active in Africa, and this percentage is marginally less than that observed in Latin America. Stated otherwise, goods and equipment contractors demonstrated the same propensity, in each of the 3 key regions, to contract on a relatively 'ad hoc' basis.**

Roughly 68% of contracts in Asia were service contracts, in comparison with the database-wide figure for services of 79%, and a figure for Africa of 87%. On the other hand, 36% of the service contractors in Asia were 'active' contractors, vs. 34% in Africa vs. 28% in Latin America. This group of 'active' service contractors in Asia averaged 4.8 contracts apiece in comparison with 4.1 for their African counterparts.

Although only 25.7% of the service suppliers in the database were operating in Asia, 37% of the 'active' service contractors were represented in the region. By contrast, 42.7% of service suppliers were working in Africa, while 60% of the 'active' service contractors were in the region. For Latin America and the Caribbean, the comparable figures are 35%, and 39% respectively. Stated otherwise, the service suppliers actually contracting in Asia, although fewer in number, **were more likely to be 'active' contractors than in Africa, or Latin America.** This differential, in part, is explained by the large number of individual and one-time contractors, in Latin America, in particular.

<u>*Latin America:*</u>

Although only 24% of all service contracts were in the region, 35% of all service contractors were positioned there. Of the 149 service contractors in the region, 34% were individual consultants, the vast majority with the IDB. Also notable is the fact that a full 62% of the Canadian service contractors in Latin America held only one contract. ***In general, service contractors in Latin America were far less likely to fall into the 'active' category than were service contractors in Africa and Asia****. This can probably be attributed to the relatively high proportion of individual consultants contracting in the region, who typically contracted on the same project, if they contracted more than once.*

More than one-third of the works contracts were in Latin America, in spite of the fact that only 23% of all contracts were located there. In contrast, 18% of the goods and equipment contracts were held in the region, and as noted above, goods contractors in Latin America were as unlikely as in any other region to be 'active' contractors.

Although, as noted above, service contractors in Latin America were less likely than in other regions to be 'active', 39% of the 'active' service contractors in the database were working in the area. Of this group, 56% were also working in Africa, and at least 24% were also represented in Asia during the same period.

<u>*Europe:*</u>

A small number of contracts were held in Europe (or 4% of the total), primarily in the Russian Federation. They were split almost evenly between goods and equipment and services. Although some 13% of all goods contractors in the database sold to the region, none contracted on more than one project. By contrast, while only .6% of service contractors were represented in the region, approximately 5% of the 'active' service contractors were involved, primarily very 'active' multinational firms.

6.3 Canadian Contracts by Country:

China dominates in terms number of contracts and by value earned, followed by Indonesia. Note, however, that the value of contracts earned in Indonesia is skewed by the extraordinarily large works contract valued at US$ 164 million (1994). The top three countries by number of contracts are in Asia, while countries in Latin America and Africa complete the next five, with Asian countries reentering the mix to share the 9th and 10th positions.

Contracts were dispersed across 48 countries in Africa, 19 countries in Asia, 27 countries in Latin America and the Caribbean, as well as 13 in Europe.

Exhibit 6.3.1 Country Rankings by Number of Canadian Contracts 1994-1998

	Country	Number of Contracts
1	**China**	**86**
2	**Indonesia**	**67**
3	Bangladesh	40
4	Haiti	32
5	Mali	31
6	Jamaica, Nigeria	29
7	Guinea	28
8	Ghana	27
9	Guyana, India	26
10	Cote D'Ivoire, Pakistan, Senegal	24
11	Algeria	23
12	Bolivia, Philippines	22
13	Madagascar, Russian Fed., Trinidad & Tobago	21
14	Tanzania	20
15	Benin, Cameroon	19
16	Chad	17
17	Burkina Faso, Nepal	15
18	Morocco, Tunisia	14

	Country	Number of Contracts
19	Barbados, Cape Verde, Nicaragua	12
20	Gabon	11

Contract distribution by category, by country:

Note that Canadians earned goods contracts in 56 countries, works contracts in 18 countries, and service contracts in 111 countries. Goods were sold in only five countries in which services were not supplied (Azerbaijan, Guatemala, Egypt, Estonia, and Lithuania).
By region, goods were sold in 17 countries in Latin America, 10 in Asia, 8 countries in Europe, and 21 countries in Africa.

Exhibit 6.3.2 Country Rankings (top 30) by Category and by Value, 1994-1998

	Country	Category	Value of contracts
1	China	**goods**	$200 485 634
2	Indonesia	*works*	$166 547 825*
3	Algeria	*works*	$42 781 765
4	Trinidad & Tobago	*works*	$38 508 000
5	Russian Federation	**goods**	$30 058 517
6	China	services	$29 896 214
7	Nigeria	services	$29 659 068
8	India	services	$26 044 563
9	Indonesia	services	$26 398 464
10	Uganda	services	$19 217 505
11	Bangladesh	services	$18 179 334
12	Senegal	services	$18 027 534
13	Haiti	**goods**	$17 676 000
14	Barbados	services	$17 248 661
15	Iran	services	$15 808 379
16	Dominican Republic	**goods**	$14 001 510

	Country	Category	Value of contracts
17	Colombia	**goods**	$14 023 000
18	Algeria	services	$13 033 682
19	Pakistan	services	$12 364 753
20	Mexico	services	$11 100 000
21	Argentina	**goods**	$11 025 729
22	Nepal	services	$11 010 192
23	Papua N.G.	services	$10 444 002
24	Tanzania	services	$10 115 137
25	Guyana	services	$10 111 773
26	Iran	**goods**	$9 862 633
27	Viet Nam	services	$9 638 192
28	Guinea	services	$8 702 202
29	Brazil	*works*	$8 424 940
30	Laos	services	$8 255 618

* almost entirely attributable to one $164 million contract

Exhibit 6.3.3 Country Rankings, Goods Category, by value, 1994-1998, top 10 of 56

	Country	Value of Contracts	Number of Contracts	Dominant Sector
1	China	$200 485 634	40	Transport/Power
2	Russian Federation	$30 088 517	9	Power
3	Haiti	$17 676 000	4	Power
4	Dominican Republic	$14 001 510	3	n/a
5	Colombia	$14 023 000	1	Power
6	Argentina	$11 025 729	3	Rural Development
7	Iran	$9 862 633	10	Earthquake Recovery
8	Pakistan	$8 578 884	9	Power

	Country	Value of Contracts	Number of Contracts	Dominant Sector
9	Tanzania	$7 151 449	3	n/a
10	Bangladesh	$6 619 207	14	Power

Values denominated in US$

Detail: Asia

Asian countries individually lead the list of the top 10 countries by contract awards and by value. Of these, China and Indonesia alone held almost three-quarters of the earnings in Asia (73.2%), and 36% of the value of contracts summed across all IFIs and all regions. China, in particular, is the clear leader, by both value and contract numbers, even once outlier contracts are removed (see adjusted totals).

Exhibit 6.3.4 Canadian Contracts by Country in Asia 1994-1998

	Country	contracts*	goods	services	works	value
1	**Bangladesh**	**34**	**20**	13	1	$26 136 649
2	**Cambodia**	5		5		$1 423 704
3	**China**	**85**	**39**	46		**$229 888 529** (**$89 553 412)
4	**India**	**26**	8	18		$29 915 727
5	**Indonesia**	**61**		59	2	**$194 847 627** (**$30 356 825)
6	**Kazakhstan**	3	1	2		$1 107 892
7	**Korea**	1		1		$180 200
8	**Kyrgyzstan**	5		5		$755 998
9	**Laos**	5		5		$8 255 618
10	**Malaysia**	3		3		$4 607 823
11	**Maldives**	1		1		$235 200
12	**Mongolia**	6		6		$1 320 172
13	**Nepal**	15	7	8		$33 853 432
13	**Pakistan**	**22**	**20**	2	1	$20 981 072
14	**Philippines**	**22**	7	15	1	$8 579 830

	Country	contracts*	goods	services	works	value
15	**Sri Lanka**	15	1	14		$5 855 289
16	**Thailand**	9		9		$2 001 187
17	**Tonga**	2	1	1		$224 521
18	**Uzbekistan**	2		2		$412 881
19	**Vietnam**	12		12		$9 638 192

*Note some general TA or Regional contracts do not show up in this list, but it is comprehensive from a country standpoint.

**reflects removal of extreme values.

Exhibit 6.3.5 Contracts in China

	WB		ASDB	
	goods	services	goods	services
1994	9	2		
1995	4	7	3	3
1996	12	3	1	8
1997	6	6	1	3
1998	4	5	1	8
Total	35	23	6	22

Asian countries individually [illegible] value. Of these, China and Indonesia alone hold almost three quarters of the [illegible] (73.2%), and 56% of the value of contracts [illegible] across all IFIs and all regions. China, in particular, is the clear leader, by both value [illegible] are removed (see adjusted totals).

Exhibit 6.3.4 Canadian Contracts by Country [illegible]

	Country	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
1	Bangladesh	34	29	[illegible]		[illegible]
2	Cambodia	5				[illegible]
3	China	85	26	[illegible]		[illegible]
4	India	26	8	[illegible]		[illegible]
5	Indonesia	61		[illegible]		[illegible]
6	Kazakhstan	3	1	2		$2 [illegible]
7	Korea	1		1		$190 [illegible]
8	Kyrgyzstan	5		5		$755 998
9	Laos	5		5		$8 255 548
10	Malaysia	3		3		$4 607 823
11	Maldives	1		1		$235 200
12	Mongolia	6		6		$1 320 172
13	Nepal	15	7	8		$33 865 437
15	Pakistan	22	20	2	1	$20 981 072
14	Philippines	22	9	13	1	$8 579 830

7 Canadian Contracts by Sector

*The dominant sector by sector of original loan, of identified contracts was the **Power** sector, in both number and value. In fact, by number, Canadians earned almost half again as many contracts in the power sector as in the second-ranked sector, **Transport**, and more than twice as many contracts as were won in the third-ranked sector, **Education**. The value figures are even more striking. By value, contracts in the Power sector represented at least 50% of the value of all contracts, **three times** the value earned in the Transport sector. In turn, contracts earned in the Transport sector were valued at greater than **three times** the total earned in the third-ranked sector, **Water and Sanitation**.*

Rank	Sector	Total Contract Values	Contract Numbers
1	Power	$601 963 222	257
	Most likely Power	$26 000	1
2	Transport	$197 122 395	172
3	Water and Sanitation	$55 221 968	64
	Most likely Water and Sanitation	$1 019 251	3
4	Education	$48 723 261	119
5	Industry	$38 607 442	76
	Most likely Industry	$1 044 853	2
	Industry/Environment	$180 000	2
6	Environment	$29 218 637	60 (32 TA)
	Environment/Transport	$122 000	1
7	Public Sector Management	$26 838 788	43
	Most likely Public Sector Management	$1 962 549	3
8	Telecom.	$20 020 185	24
9	Agriculture	$18 333 426	61
10	Infrastructure	$16 809 311	34
	Most likely Infrastructure	$142 038	1
11	Population, Health and Nutrition	$12 763 599	40

Rank	Sector	Total Contract Values	Contract Numbers
	Most likely Population, Health and Nutrition	$103 238	1
11	Finance	$12 164 915	49
	Most likely Finance	$50 750	1
12	Rural Development	$8 852 487	6
	Most likely Rural Development	$214 988	1
13	Urban Development	$8 159 682	30
	Most likely Urban Development	$365 000	1
14	Social Sector	$6 283 218	11
15	Reconstruction	$5 248 492	9
16	Private Sector Development	$4 828 520	13
17	Public Sector Development	$1 641 124	2
18	Structural Adjustment	$55, 000	1

*note $72 7000 586 or 6% of the contracts by number were not marked by sector.

7.1 Contracts by Sector, by Region:

Africa:

*In Africa, by value, **Transport** dominated, with almost twice the value of contracts earned in the second-ranked sector, **Power**. **Industry** was the third-ranked sector, by value, with **Education** a very close fourth. Contracts in the **Transport Sector more than tripled the value of contracts in either the Industry or Education sectors,** however. When data is viewed by number of contracts, on the other hand, rankings are altered. **Power** was first with 71 contracts, **Transport** second with 65 contracts, and **Education** a close third with 59 contracts.*

Asia:

*In Asia, **Power** dominated in both number and value of contracts, with 32% of the identified contracts, followed by **Transport** with 19%, and **Education** with almost 10%. In terms of value, **Power** contracts earned more than **5 times the value** of contracts in the **Transport** sector, which in turn earned more than **4 times the value** of contracts in the **Education** sector.*

Latin America:

***Power** again dominated in Latin America, with 22% of the identified contracts falling into that sector. **Transport** was a distant second, with 14% of the identified contracts, and **Public Sector Management** in third with 11%. **Environment** was also a relatively important sector with a 9% share, and **Education** followed with 8%. By value, **Power** earned **three times as much as the next sector, and more than nine times the total earned by the third-ranked sector**. Note that the greater mix of sectors with 5-10% of the contracts in this region is again likely attributable to the preponderance of consulting contracts earned by Canadians.*

	Most likely Finance		
12	Rural Development	$8 [illegible]	[illegible]
	Most likely Rural Development	$214 988	[illegible]
13	Urban Development	$8 159 082	30
	Most likely Urban Development	$585 000	[illegible]
14	Social Sector	$6 282 218	[illegible]
15	Reconstruction	$5 246 [illegible]	[illegible]
16	Private Sector Development	$4 828 520	[illegible]
17	Public Sector Development	$1 641 124	[illegible]
18	Structural Adjustment	$55, 000	[illegible]

*note $72 7000 586 or 6% of the contracts by number were not assigned to a sector.

7.1 Contracts by Sector, by Region:

Africa:

*In Africa, by value, **Transport** dominated, with almost twice the [illegible] second-ranked sector, **Power**. **Industry** was the third-ranked [illegible] very close fourth. Contracts in the **Transport Sector** [illegible] in either the **Industry** or **Education** sectors, however. When [illegible] contracts, on the other hand, rankings are altered. **Power** was first [illegible] **Transport** second with 65 contracts, and **Education** a close third with [illegible]*

Asia:

*In Asia, **Power dominated** in both number and value of contracts, with [illegible] contracts, followed by **Transport** with 19%, and **Education** with almost [illegible] **Power contracts** earned **more than 5 times the value** of contracts in the **Transport** [illegible] in turn earned **more than 4 times the value** of contracts in the Education [illegible]*

Latin America:

8 Canadian Contracts from a Canadian Regional Perspective

Quebec is the clear leader, with 44.1% of the contracts in the database for which we have an ascribed province for the contractor. Ontario was ranked second with nearly 34.6 % of the contracts, followed by British Columbia 9%, and Alberta with 8.7%. Manitoba ranked a distant fourth with 2.4% of the contracts, almost a quarter of which were held by a single consultant. Three other provinces were represented, with 11 contracts (1.1) held by Nova Scotian firms, and 2 contracts held by firms from each of Newfoundland and Saskatchewan.

Exhibit 8.1 Number of Contracts by Canadian Contractor Province of Origin, 1994-1998

Province	Number of Contracts
Alberta	83
British Columbia	81
British Columbia/Manitoba	2
British Columbia/Quebec	2
Manitoba	20
Manitoba/Ontario	3
Newfoundland	1
Newfoundland/Ontario	1
Nova Scotia	11
Ontario	321
Quebec	421
Quebec/Ontario	6
Saskatchewan	2
Unattributed	272

Africa:

The fact that Quebec contractors dominate the analysis is aided, not surprisingly, by the large number of contracts won by firms/consortia from this province in Africa. In fact, 69% of the contracts attributed to contractors from Quebec were earned for work in Africa. Interestingly, although a small number, nearly 50% of the contracts held by Manitoban firms were in Africa. By contrast, less than 25% of the identified contracts held by firms from Ontario were in the region, though of a much more substantial number.

Asia:
Almost 39% of contracts won by contractors from Ontario were earned in Asia, whereas only 17% of contracts earned by those from Quebec were in the region. Not surprisingly, 70% of the contracts held by firms from B.C. were held here. Asia also dominated Alberta's regional profile, with nearly 50% of the province's contracts.

Latin America:
Firms from Ontario held the largest share of the identified contracts in this region, with 28% of the province's contracts earned there. Interestingly, more than 80% of the contracts held by Nova Scotian firms were in the region, and 1 of the 2 contracts of each of the Saskatchewan and Newfoundland firms stemmed from Latin America.

Europe:
Primarily firms from Alberta and Ontario contracted in Europe.

9 Technical Assistance Contracts and the Trust Funds

IFI officials often hire consultants to provide specialized assistance, in the preparation and evaluation of bank projects, among other work. This 'sector' provides significant opportunities for qualified Canadian consultants, and has proved, historically, to be an area in which Canadians have found substantial success.

Two hundred and ninety three (293) or roughly 24% of the 1226 contracts across 5 banks listed in our database are clearly defined as Technical Assistance (TA) contracts to Banks. At least another 84 contracts listed are likely TA contracts, which, if confirmed, would bring the share of TA contracts over 30%. Apart from the Asian Development Bank, the data represents TA contracts funded by the banks directly, and does not include Canadian CTF funded work.

9.1 Canadian Trust Funds Financed by CIDA:

Note that Consultant Trust Funds financed by CIDA at 4 of the 5 banks studied (except the ASDB), offer additional funds to be applied to the hiring of Canadian consultants by task managers at the banks. Contracts funded by CTFs are not captured in our general data, as the data that we have regarding the uptake from these funds is sketchy at best.

CANTAP CTF, IDB :

For the IDB, for example, we have a list of an additional 28 contracts, covering the 1997-1998 period, credited to Canadian firms via the CANTAP Consultant Trust Funds, with a combined value of US $2, 373, 658 (avg. $84, 773). This is important data, as our main database contains a list of only 53 contracts for 1997-1998 with this bank with a combined value of 19, 453, 024 for these two years.

It is interesting to note that of the 28 TA contracts, only two of the firms listed are also listed as having won subsequent consulting contracts with the Bank in 1998 (RJ Burnside International and Blackstone Consulting). However, five of the companies listed had won contracts with other IFIs (ASDB or WB) during the 1994-1998 period covered by our data (usually before the IDB contract). Some early numbers for 1999 indicate that some of the active players in the database won TA contracts with the IDB in this year (ARA Consulting Group, Dillon Consulting, SNC Lavalin, Ernst and Young)

Environment CTF, WB:

From 1994-1998, $1,425,890 was awarded under this CTF, in 72 contracts. At least 16 of the firms listed were also frequently listed within the main database. (Firms such as Acres, Agriteam, Deloitte and Touche).

9.2 Special Case: Technical Assistance at the ASDB

Canadian TA contracts won at the ASDB represent a special and illustrative case, as a result of the fact that all Canadian TA contracts are included in the data from the bank. All TA contracts at the ASDB must go through International Competitive Bidding (ICB)..

Exhibit 9.1.1 Technical Assistance Contracts at the ASDB

In addition to Canada's strong performance in this category, it is interesting to note that TA grants are apparently continuing to grow in relative importance at the ASDB. Although the bank's lending decreased by almost US$1 billion in 1999, from US$ 5 982 million in 1998 to US$4 986 million in 1999, technical assistance increased to 323 TA grants valued at $US 184 million, from 248 grants valued at US$163 million in 1998. This represents an increase of 30 percent in number and 12 percent in value over 1998 figures.

Year	Number of TA contracts	Number of projects involved	Number of companies involved	Total of Canadian service contracts	Total number of Canadian contracts	Percentage of contracts that are TA contracts	Value of contracts with Bank that are TA
1995	18	15	15	34	44	40.9/52.9 of service con.	4 754 462=28.2%
1996	30	24	26	48	70	42.9/62.5 of service contracts	10,800 820= 36.9%
1997	23	19	19	37	45	51.1/62% of service	9, 254 462=35.3%
1998	20	14	17	33	40	50/60.6	8, 094 687=26.9%

Exhibit 9.1.2 Total Canadian TA Contracts with the ASDB 1994-1998

TA contracts 1994-1998	Total Canadian firm contracts with the Bank 1994-1998	Percentage of contracts recorded that were TA contracts	Number of firms/consortia /individuals represented
91	179	50.8	51

Exhibit 9.1.3 Source of Financing for TA Contracts won by Canadian firms at the ASDB

	Japan	Denmark	Fin	Neth	Belgium	Norway	Sweden
1995	7/18						
1996	19/29	2/29	1/29	1/29		1/29	
1997	12/23			1/23			
1998	9/20				1/20		120

Exhibit 9.1.4 Role of Canadian Firms on TA Contracts Won at the ASDB

	Lead firm	Associate firm	Sole firm
1995	10	7	1
1996	17	8	4
1997	14	7	2
1998	7	8	5

Exhibit 9.1.5 Canadian Firms with TA Contract at the ASDB 1994-1998

	Company name	Year of TA contract(s)	Other contracts	TA to other banks:	Contracts with other banks
1	ACCC	1996	1995, 1997	WB	AFDB
2	Acres	1995, 1996, 1998			WB, IDB
3	Agra Earth & Environ.	1996, 1998			WB
4	Agra Monenco	1995, 1996, 1997, 1998			WB, IDB
5	Agriteam consulting Inc.	1995, 1996	1996		
6	Agrodev	1995, 1997	1995, 1997		WB
7	ARA Cons. Group	1996, 1997, 1998		WB	WB, IDB
8	British Columbia Institute of Tech.	1997			
9	Canadian Bond Rating Service	1996			
10	Canarail Consultants	1995, 1996, 1997			WB

	Company name	Year of TA contract(s)	Other contracts	TA to other banks:	Contracts with other banks
11	Canedcom Int'l	1995, 1996, 1997			
12	Canora Asia Inc.	1996, 1998			
13	Chreod Ltd.	1996			
14	Commonwealth of Learning	1996			WB
15	Communitas City Mgmt	1998			CDB
16	Cowater Int'l	1995, 1996, 1997, 1998	1997	WB, CDB	WB
17	De Romilly & De Romilly	1997			BDC
18	Deloitte &Touche	1995, 1998			AFDB, WB
19	Dillon Consult.	1996, 1997			IDB
20	Ernst & Young	1998			
21	Essa Tech.	1995			WB
22	EVS Consult.	1996			
23	GEC Global Env. Consult.	1996, 1998			
24	Hatfield Cons	1996			
25	Hickling	1995, 1996, 1997, 1998	1996	WB	
26	Hydro Quebec	1996, 1997			WB (note: goods and services)
27	Hydrosult	1997			
28	Klohn-Crippen	1997			IDB
29	Les Consultants LBCD Inc.	1998			
30	McCarthy Tetrault	1998		WB	WB
31	Michael I. Kennedy &Assoc.	1997			
32	ND Lea	1996	1995, 1996	WB	WB
33	NLK	1996			

	Company name	Year of TA contract(s)	Other contracts	TA to other banks:	Contracts with other banks
34	Northwest Hydraulic Cons.	1995, 1996		WB	
35	Regie Inc.	1995		WB	
36	Resource Futures Int'l	1995			
37	Roche	1995		WB	
38	RSW International	1996			
39	Senes Consult.	1998			WB
40	Sierra West	1996			
41	Simon Fraser	1997			
42	SM Group	1997, 1998		IDB	
43	SRD Sustainable Resource Development	1995			
44	Stantec	1995			
45	Stikeman, Elliot & Larrain	1997			WB
46	Tecsult	1998	1998	WB	WB, AFDB
47	Tecsult/Eduplus	1996			
48	Teleconsult	1996			WB
49	Teshmont Consult.	1998			
50	Wardrop	1996		WB	WB
51	World University Service of Canada (WUSC)	1997			WB

9.3 TA at the Caribbean Development Bank:

Notably, Canadians earned 48% of the TA contracts awarded, by value at the CDB in 1998. Unfortunately, no other TA data is available for this IFI in other years.