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Proposal to determine whether and
how Canadian product manufacturers
can gain a greater share on ADB
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DEPARTMENT OF EXTERNAL AFFAIRS

**PROPOSAL TO DETERMINE WHETHER AND HOW
CANADIAN PRODUCT MANUFACTURERS CAN GAIN
A GREATER SHARE OF ADB FUNDED PURCHASES**

January 8, 1986

Submitted to: Jean-Marc Duval

Submitted by: D.R. Halliday
H.G. Harowitz

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Dept. of External Affairs
Min. des Affaires extérieures

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The
Coopers
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Management Consultants

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I. INTRODUCTION

Our interest in the Asian Development Bank started with a visit in 1983. In November and December 1985, we made our seventh and eighth visits. We now know the Bank, its planning cycles and many of its staff well. While our interest has been in management consulting services, the Country Officers and Project Officers with whom we meet also hold responsibility for the loans used to purchase products.

We have carried out, on our own behalf, many of the activities required to successfully complete the project now being considered by External Affairs. We also have extensive experience with Canadian industry in developing overall business and marketing strategies and within these, marketing strategies for exports. We can place export marketing within the priorities of an overall Canadian Business context. This experience complements our direct knowledge of the Bank, its people and their practices.

With this background, we know we can be effective in providing you with answers to the questions you now face. In the sections which follow we give:

- o a brief history of our own experience with the Bank;
- o a brief description of how the Bank goes about decisions and the volume of purchases involved;
- o a description of how we would conduct the work;
- o a summary of our relevant experience;
- o the experience of the proposed project team; and
- o fee and expense quotations.

II. OUR EXPERIENCE WITH THE ASIAN DEVELOPMENT BANK

On November 1985, our firm changed its name to The Coopers & Lybrand Consulting Group. We were previously known as Currie, Coopers & Lybrand, and under that name we had conducted assignments on behalf of many international lending agencies and development organizations. In late 1982, we decided to pursue work with the Asian Development Bank (ADB). Registration forms were completed and dispatched. We slowly found that ADB is a unique institution. We also learned our first lesson - the ADB's registration procedures are the most stringent of all we have encountered. In late 1983, we made our first visit to Manila.

We have now made eight visits to the Bank and our relationships extend throughout the three important elements of the organization, i.e. Country Department Project Groups and the Central Projects Services Office. We also know well the ex-Director for Canada who is now Treasurer of the Bank, have met with the Alternate Director and are aware of Jean-Marc Matirier, the new Director who takes up his new post this month.

We follow the publication "Operational Information on Proposed Projects" published monthly by the Bank. On our visits we investigate new projects which may or may not be listed. We also discuss proposed projects to determine their timing and requirements. Finally, we discuss with decision-makers why we have been unsuccessful and compare, with them, our submission with that of the successful bidder. We have found Bank officers to be generally cooperative.

3.

We now know our way around each of the Bank's three Manila locations. We have a good feel for the various project phases, the timing of the planning cycle and the factors which can change the planned progress of projects. We also now better understand the influences on decision-making which, while invisible, are very real. Finally, and perhaps more important, we now have the contacts in place to find information when we need it. These contacts, together with a very effective Embassy staff, prove invaluable in dealing with the ADB which is both costly and time-consuming to visit.

III. THE ASIAN DEVELOPMENT BANK AS A MARKET

The Asian Development Bank approves approximately 50 loans per year. These will be the prime focus for investigation.

The 125 Technical Assistance projects approved by the Bank annually normally do not include any direct spending on products. However, Technical Assistance projects are of two types:

- o advisory and operational; and
- o project preparation.

The latter category is the pre-cursor to detailed loan planning and lending decision-making. Invariably, the studies involve consultants. Often the consulting group involved in project preparation studies is also involved in the project execution. The nationality of the consultant may affect product purchasing patterns. Thus, in this category of ADB, technical assistance is highly germane to any product supplier. Each of the 50 annual loans is subject to project preparation studies. However, planning with the Bank starts well before this stage.

The earliest stage of the planning process is completed by the Country Officers. They, in consultation with the receiving country, develop a list of priorities for assistance. In developing this list, Country Officers will also call on the help of project specialists within the Bank, who may advise on technical feasibility. This process is not without a political element. The requests of the receiving country can reflect a political influence and it is well, if informally, recognized within the Bank that a strong, aggressive Project Officer can change at least project timing. Nevertheless, the responsibility for a Country plan rests with the Country Officer.

LOANS

Country/ Borrower/ Executing Agency	Proposed Bank Loan Amount (US\$Million)	Tentative Project Title and Description	Consulting Services	Present Status
Bangladesh				
Bangladesh Chemical Industries Corporation (BCIC), Shilpa Bhaban, Motijheel C/A, Dhaka Telex TANCORP DAC 847	15.8 (Revised)	Chhatak Cement Plant Expansion ¹ — Provision of necessary inputs for balancing, modernization, rehabilitation and expansion of the Chhatak Cement Plant's annual production capacity from 133,000 m.t./yr. to 267,000 m.t./yr; and improvement of the operational efficiency of the plant. Total project cost estimated at \$27.8 million, including foreign exchange cost of \$20.0 million. Sector: Industry and Non-Fuel Minerals (Industry [Non-Agriculture])	Consultants will be recruited by the executing agency.	Board papers under preparation. Co-financing with France envisaged.
Agricultural Development Bank of Nepal (ADBNI), Kathmandu Telex 2267 ABRBK NP	24.7 (Tentative)	Fifth Agricultural Credit — Provision of pump irrigation facilities and farm machinery, and installation of water turbines and biogas facilities. Sector: Agriculture and Agro-Industry (Agricultural Support Services)	No decision made whether consultants will be required.	Various aspects of the Project under review.
Burma Dockyard Corporation (BDC), Sinnalike, P.O. Box 570, Rangoon Telex 21340 BDC BM	15.5	Dockyard Improvement ² — Improvement of shipbuilding produc- tivity and increase in ship repair capacity of the yard; provision of additional workshop equipment, materials handling equipment, materials for shipbuilding and ship repair and a new ship lift system, in- cluding training of staff at supervisory and technical level. Sector: Transport and Communications (Ports and Shipping)	Consultants will be required.	Various aspects of the Project under review.

Project Preparation

Country/ Executing Agency	Tentative Project Title and Description	Consulting Services	Present Status
Directorate General of Water Resources Development (DGWRD) Jl. Pattimura No. 20 Blok III, Kebayoran Baru, Jakarta Telex 47266 DJAIR IA	(N) Central Java Groundwater Irrigation Development ¹ — The proposed Project includes: (i) feasibility studies to assess the tech- nical feasibility and financial, economic and institutional viability of groundwater irrigation development for 22,500 ha in Central Java including the financing of such development through farmers investment; (ii) the development of support programs to support such development; and (iii) the preparation of detailed designs and program to expand farmers investment in groundwater irrigation. Sector: Agriculture and Agro-Industry (Irrigation and Rural Development)	Consultants will be recruited by the Bank.	Various aspects of the Project under review.
Ministry of Forestry, Manggala Wana Bhakti Jalan Gatot Subroto, Jakarta Telex 48228 PRXIA 587945/ 586954	Wood Centers Development — Project preparation for the establishment of two wood receiving and dispatch centers to bring timber from outer islands to Java and distribute it to private wood industries. The proposed technical assistance will be in two phases. Phase I will determine the overall justification of establishing these centers. Phase II will consist of detailed proposals, preliminary design and detailed cost estimates and implementation mechanism. Sector: Agriculture and Agro-Industry (Forestry)	Consultants will be required.	Board papers circulated.

Each country plan consists of several projects. Project planning responsibility rests with the Project Officer (eg. a Senior Urban Development Specialist from the Social Infrastructure Division of the Infrastructure Department). The Project Officer may arrange one or more fact-finding field missions during the preparation of a project plan and these will culminate in a Project Preparation Study under the Bank's Technical Assistance Program. This study will normally determine project feasibility and justification and detailed costing. Examples are shown opposite this page.

3
Loans are made to cover all or part of the cost of one or several related projects. The Central Loan Administration Services Division, part of the Central Projects Services Office becomes involved here. The Country Officer, Project Officer and a Project Specialist from the Central Loan Administration Services Division act as a committee in making a recommendation to the Board of the Bank for loan approval. Once a loan has been made the responsibility for project execution passes to an executing agency representing the government of the recipient country. This agency will make all purchases. The Bank staff will advise on and monitor project progress.

As you can see from some sample loan descriptions on the opposite page, the fact that projects are not directly executed by the Bank is complicated by the use of Consultants. Of the 83 proposed loans being considered by the Bank at the end of 1985, 66 will definitely make use of consultants and in a further seven cases the decision on whether consultants would be required had yet to be made. Consultants can strongly influence product choice. The argument has been made, but not proven, that some Bank staff tend to favour consultants of their own nationality and that the combination of the key Bank staff member and consultant of the same nationality may also tend to favour product suppliers from their country.

Co-financing of loans adds another influence and complication. When loans are jointly financed by the ADB and another agency, particularly if that agency is national as opposed to multi-national, it is felt that suppliers from the co-financing country are favoured either informally or through formal agreement. In 1984, a total of 23 projects valued at just over \$1.1 billion U.S. were jointly financed by the ADB and another agency. We understand from you that plans for 1986 call for 21 projects to be subject to co-financing and that the total value of ADB contributions will be about \$550 million. An examination of co-financing trends and opportunities is thus critical. However, at least in the short-term, co-financing is not likely to be a factor in a new type of lending to be undertaken by the Bank.

To date the Bank has only granted loans to Governments or to the private sector with Government guarantees. In October of 1985 a new program was announced to allow Bank lending to the private sector without government guarantees. This is initially a two year program with a one year interim review and an annual budget of \$100 million U.S. While now small, this program could bear promise for aggressive suppliers.

For the purposes of the proposed study to be undertaken for External Affairs, the above brief description has several implications:

- o The ADB has a good information system, which probably extends to historical records;
- o Early country plans are not detailed in terms of product requirements;

- o Detailed project product requirements may not be available until shortly before or even after loan approval;
- o At least two people within the Bank must be talked to for each future project;
- o The planning process is to some degree influenced by political factors;
- o The buyer of products is normally the executing agency of the recipient country rather than the Bank;
- o Consultants will normally play a strong role in influencing product selection; and
(NOTE: Canadian Consultants gain 11% of Bank Consulting spending).
- o A new private sector market may emerge with ADB funding.

These factors have influenced our work plan.

IV. OUR APPROACH TO THE STUDY

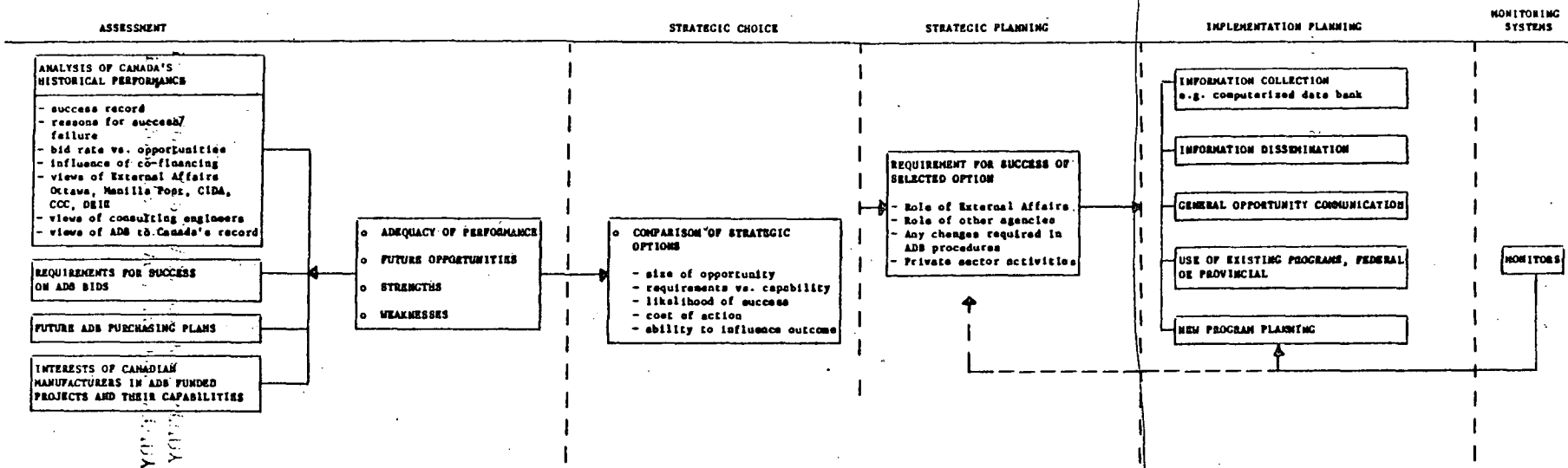
We understand the objective as being to determine whether and how Canadian product manufacturers can gain a greater share of ADB funded purchases.

We have read carefully and accept the terms of reference provided. Having reviewed the intent of the study and the work involved, we feel there is real benefit to be gained by translating the work program given in the Terms of Reference to a framework to guide our thinking and give focus to the study.

As you well know and implied, the role of External Affairs and other Canadian agencies in promoting Canadian product exports to the ADB can be only catalytic and supportive. The key questions to be answered are:

- o whether additional opportunities exist within ADB funded projects;
- o whether Canadian manufacturers have the capabilities to take profitable advantage of them;
- o the degree to which the interest or capabilities of Canadian manufacturers could be increased; and
- o the role which various agencies of the Government of Canada could play in doing so.

We have found through experience that the five phased framework shown opposite the following page is the most effective way of dealing with strategic choice and strategy formation.



The first phase consists of an assessment of the current situation; the second, a comparison of strategic options to yield a choice; the third, planning the conceptual requirements for that choice; the fourth, developing detailed plans for implementation; and the final phase, developing systems for monitoring progress.

*Computer
prod*

We recognize that you have not asked for the complete process to be conducted. In essence, you have asked that we complete only the assessment, strategic choice and strategic planning phases. You have also asked, as a possible option, that we provide a quotation on building a project database, an activity which is beyond this framework and into actual implementation. With this exception, the phases you have identified are those which we recommend to our clients. At this stage the need for change in implementation activities cannot be justified, their nature is not known and thus the need for consultants is conjectural. Nevertheless, while this framework extends beyond your needs, we feel its use will benefit our work in this study and your use of the results.

The details of the framework have been developed for this specific study. You will note that we have added some minor elements which we feel will enhance the study with little or no cost. For example:

- o Because consultants are so important in implementing ADB funded projects, we suggest contacting four or five Canadian Consulting Engineering firms to gain their views of the past and possible future performance of Canadian product suppliers. ✓
- o While implicit in the Terms of Reference, we have separated the requirements for success on bidding for ADB funded projects into a

discrete section of the assessment. This is the base against which the interests and capabilities of Canada's suppliers must be evaluated.

Other elements are more semantic than material.

As you will see, the framework leads naturally from assessment, through future options to the possible choice of an option for change. To be completed effectively and efficiently the majority of the data collection must be done in the assessment phase. In addition, while we as consultants can recommend and justify a strategy, only you can make the final choice and for this you need a full understanding of the options. Our work program reflects these two important elements of our approach.

A. THE ASSESSMENT

The assessment has four steps leading to a conclusion on the adequacy of current performance, opportunities for improvement and the capabilities which exist to exploit them. The first phase deals with an analysis of historical performance.

1. An Analysis of Canada's Historical Performance

We already know Canada's share of product purchases and that it falls significantly below our share of funding. However, in order to provide the proper perspective for complete analysis, we will start by gaining a complete understanding of the ADB's product purchasing of the last five years. This will require an analysis of approximately 250 loan files. To do so we will:

250

- Source of Funds

- Total Cost of Foreign Project:
Local ADB loan

- Value of Financing

- Description of various components:
procurement details
equip. specifications

- Names of Persons to meet at EA + Fin Agency

- Sector Procurement Agency Contracts

- Project Name
- Recipient Country
- Executing Agency, (ADB, Recipient or Other)
- Size of Loan
- Value of Product Purchases, Total and By Class *Product*
- Name of Co-financing Agency, If Any
- Value of Co-financing
- Co-financing Ties, If Any
- Source of Purchases by Value and Class
- Whether a Consultant was Involved
- Nationality of Consultant
- Whether a Canadian Bid was Entered
- Value of Canadian Bid by Class of Product
- Success of Canadian Bids
- Nationality of Other Bidders
- Value of Their Bids by Product Class
- Success or Failure of Each Bid

Note: We considered including the nationality of involved ADB officers but rejected it on two bases: the findings are unlikely to be any more actionable if quantitative than they would be if qualitative; and the Bank has recently decided (October staff list) not to give the nationality of staff. An analysis on this factor may not be viewed well.

Equipment Components
Value of Equip. Components
Procurement Schedule

- o design a data collection form;
- o complete the forms using ADB files and reference to staff where available and necessary;
- o enter the data into a computer model; and
- o complete the analysis.

Since many ADB loan projects consist of several sub-projects which can be large, sub-project forms will be used which can be linked through coding to the major project.

The information we will seek for each project is shown on the opposite page.

This data, when analysed using our existing computer software, will allow us to determine quantitatively:

- o The absolute value of purchases by product class;
- o Canada's relative success rate versus other countries in total and by product class;
- o The incidence and apparent influence of co-financing;
- o Canada's relative incidence of co-financing versus other countries;
- o The apparent influence of the nationality of consultants where involved.

This information will also provide the base for determining what opportunities might have been available to Canadian bidders had they participated.

In this analysis we will start by identifying the value of purchases by product class for which Canadians did not enter a bid. The product classes will be as finely segmented as possible. In collecting the data in the previous step notes will be made on product specifications where it seems reasonable that such will be required. This may be severely limited by information availability.

2. The next step is to compare these purchases with Canadian capabilities. This must be a subjective comparison which may also be impaired by a lack of fine data. To make it more useful we will:

- o provide a complete list of product class purchases; and
- o use as a decision rule "is there sufficient evidence that a Canadian company has sufficient capability and, if it had the interest or the interest could have been elicited, it would have warranted that company's further investigation". While clumsy, we believe this captures the essence of the question.

To be effective, the consulting team must combine a broad knowledge of Canadian industry and be motivated to fill any gaps in their knowledge. As you will see later, our team has these qualities.

We believe that Embassy staff in Manila, and those who were posted there and are now resident in Ottawa have already, even if informally, given this question much thought. We would, therefore, include this topic in our discussions with them as we would with the new and past Directors for Canada and the Alternate Director.

The source data for this and previous analyses will be ADB files. Only in exceptional cases would we attempt to interview the Bank officers involved in each loan. We feel the Bank's information system is good and that the files should prove reasonably adequate. However, we recognize that normally loaned funds are disbursed by the recipient and files will not be universally accurate or complete.

assumption:

We understand from you that the Bank has agreed to cooperate in this study. Based on our experience, we feel cooperation would best be obtained for file access by having requests come from the Director's Office. We feel we will need the Director's full support in carrying out this study. This is particularly true in arranging personal interviews with Bank staff.

Personal interviews will be required with Bank staff for two of the remaining components of the historical analysis:

- o defining the reasons for success and failure of Canadian bids; and
- o defining details of co-financing over the past three years.

We understand that the Manila post feels that only ^{14.}20 bids will require analysis to determine the reasons for Canada's success or failure. All Canadian bids will be identified from our first analysis. This list will be checked with Embassy staff. For each project we will meet with the appropriate Bank Project Officer or, if he is not available through termination or an out-of-country trip, with an alternate to review the file. In our discussion we will seek to compare successful Canadian bids against runners-up and unsuccessful bids against those of winners. The criteria will vary according to the equipment class but, in most cases, would include:

- o price;
- o financial terms;
- o government support to buyer or seller;
- o product specifications;
- o experience in use;
- o delivery terms and timing.

In addition to these more easily compared factors, we would also look for those which are less quantifiable such as:

- o reputation of manufacturer;
- o buyers' experience with other Canadian products;
- o factors such as where the buyer was educated which may affect attitudes;
- o relationships and frequency of contact.

Having already completed such evaluations with Bank staff, we know they can be very helpful. However, we suspect that some

difficulty will be encountered under two sets of circumstances:

- The Project Officer for some older projects may no longer be with the Bank and alternates may have no more knowledge than exists in the file. In these cases, we will attempt to find someone in the Country Department or the Central Projects Services Office who has knowledge;
- Cultural and language differences, together with differences in personality, can result in varying degrees of trust and openness, particularly on a first meeting. Formal introductions from the Director's Office through the staff lines will help in this regard as will a complete explanation of the need for data, how it will be used, and the confidentiality of individual sources.

Similar problems may exist in completing our interviews regarding co-financing of past projects. Again, we will know the projects from our first step. We will also have much of the required detail. Thus, these interviews will be conducted only where additional information not in the file is needed.

To complete the historical assessment will require three other elements:

- the views of Canadian Government Agencies, these to include External Affairs (South and South East Asian Trade Development Division and Manila); CIDA, DRIE, and CCC. With the exception of the Manila post, we have assumed that all interviews will be conducted in Ottawa. We would

seek to hold wide-ranging discussions to include experience, perceptions, program descriptions, interests and ideas for creative solutions.

- o the views of ADB staff toward Canada's past and potential performance. These will be collected during interviews primarily designed for other purposes.
- o the views of Canadian Consulting Engineers. These interviews would be conducted with four or five groups by telephone. We would explore their thoughts on:
 - the degree to which consultants influence product choice;
 - the competitiveness of Canadian suppliers;
 - the competitiveness of foreign suppliers;
 - the aggressiveness of Canadian and foreign companies in trying to influence specifications;
 - the practices of foreign companies in marketing;
 - their experience with Canadian suppliers;
 - their interest in having Canadian suppliers more successful; and
 - their advice on how they should change to do so.

We feel this would be a valuable input and worthwhile addition to the study.

These steps would complete the review of historical performance. To complete the assessment requires three other steps which are discussed next.

Documents
published by
ASDB

Do you have: Guidelines for Procurement
under ASDB loans,
Handbook on Policies, Practices +
Procedures Relating to
Procurement
under ASDB loans

CONTENTS OF QUESTIONNAIRE

- o Product Classes Sold
- o Total Sales
- o Export Sales
- o Export Sales to International Lending Agencies
- o Export Sales to ADB
- o Past Activity in Exports*
- o Past Activity with ILA's*
- o Past Activity with ADB*
- o Experience with ADB:
 - registered
 - number of bids made value and success
 - difficulties encountered
- o Value of Canadian Government Agencies
- o Use of Programs
- o Evaluation of Help Provided by Manila Post
- o Receipt of Telexes from Manila Post
- o Were They Relevant?
- o How Were They Handled?
- o Future Intentions in Exporting:*
 - with ILA's
 - with ADB
- o Constraints and Assistance Required

- Are registered?
- Sample Bidding Documents:
Procurement of Goods.

* attitudes will be collected using semantic differential scales

2. Requirements for Success on ADB Projects

While evident to those who investigate, we feel this is a worthwhile base point against which to measure past or future Canadian activities. The only work required will be writing the section of the report. Information will come from our own knowledge and interviews required for other purposes. It will include:

- o registration and registration tactics;
- o the need for monitoring and early information; and
- o the importance of relationships with ADB, executing agencies, consultants, etc.

This will primarily be a re-statement of what has made successful companies successful.

3. Interests and capabilities of Canadian Companies

This will be a restricted but important investigation. It will focus on those companies who have been telexed by the Manila post. We would like to work with a sample of approximately 50 companies. Their names and the questionnaire we would use with them would be submitted to you for approval. The questionnaire would be mailed to the appropriate officer in each company. He would be asked to review it and collect any information necessary to prepare for a phone interview on a named date. In order to get an early start on this process, we ask that the Manila post send names to us early in the project. We anticipate that the questionnaires would be mailed prior to our departure for Manila. The questionnaire could include the topics shown on the facing page.

We have found this combination of mail and telephone to be very effective. We gain high completion rates, good cooperation and a thoughtful mix of information.

4. Future ADB Purchasing Plans

The final element of the Assessment will focus on future opportunities for both product sales and co-financing. We will meet with Country Officers and, as appropriate, Project Officers to review the Bank's plans.

The first stage will be to meet with Country Officers to develop a project database. Forms similar to those used in the first phase will be used. A current staff list for the Bank is provided as Appendix I. There are 52 individuals in the Country Department, not including Young Professionals to cover the 20 countries plus the South Pacific Region. The Peoples Republic of China will probably be added to the Bank's membership within the next three years but no responsibility has yet been assigned. We suspect that meetings may be required with up to 38 people in the Country Department. We know from experience that Country Managers will not have full knowledge of the information we require. Thus, meetings with Project Officers will be needed.

The three year horizon should mean that we will find approximately 150 loan projects, many with sub-projects. Most will have some product requirement. However, we feel that detailed information on product requirements will not be available on some. Last month we reviewed the 1987 country plan for Bangladesh. Little detail was evident. Reference

to Project plans revealed only gross financial figures, but the Project Officer would have been able to provide estimates of purchasing requirements in reasonable detail. We therefore expect that reference to Project Officers will give us better and more detailed cost projections or estimates based on experience. There are over 200 people in this category but we feel only 50 - 75 will require interviews.

While conducting this research, we will also investigate plans and opportunities for co-financing. Discussions in this regard will also include representatives from the Central Projects Services Office.

For the cost-efficiency of our own analysis, the information from each project data sheet would be entered into a computer model. We use software for IBM or IBM compatible micro or personal computers. Only minor tailoring and documentation would later be required to have usable discs available to External Affairs.

The information would comply with that which you requested should it be available. In addition, we would add indicators regarding the likelihood of projects proceeding on time. Some projects now in the pipeline have been there for some time and will probably stay there for some time to come, owing to uncertain relations between the Bank and the recipient country. Certain projects in the Philippines and Pakistan are in this category.

This step completes the final data element of the Assessment. Each of the four data elements would have been analyzed. The next step is to bring them together to form an overall assessment in which we would show:

- o current performance;
- o opportunities for improvement;
- o requirements for performance improvement;
- o interest of manufacturers in pursuing Bank opportunities;
- o their strengths and weaknesses for doing so;
- o constraints; and
- o the views and expectations of other interested parties, i.e. ADB, Government and consultants.

These are then translated in the next step into options for External Affairs or other agencies to influence future performance.

B. STRATEGIC CHOICE

In this phase we will examine the options open to Government to act directly or indirectly to change Canadian suppliers' success rate. As you have pointed out, a wide range of options might exist varying from none which appear cost-effective, to elaborate programs which, while cost-effective, may place too high a priority on this particular endeavour.

While we cannot tell now what the options might be, they will likely fall mainly into communications fields or programming. To illustrate, some options for study might include:

- o be reactive only
- o upgrade the telex program in frequency and content
- o increase reach and frequency of ADB seminars

EASE OF IMPLEMENTATION

- Fit with Policy
- Cost vs. Funds Availability
- Likelihood of Success
- Resource Availability
- Etc.

HIGH

MEDIUM

LOW

H
I
G
H

M
E
D
I
U
M

L
O
W

ATTRACTIVENESS

- Expected Outcome
- Manufacturers' Competitive Advantage
- Requirements for Manufacturers to Implement
- Ability/Willingness of Manufacturers to Implement
- Cost/Benefit

- o actively promote the pursuit of ADB funded product sales through re-packaging existing programs and tailoring them to ADB efforts.

We would examine individual options and combinations. The examination would reflect both expected benefits and costs but in neither case would they be precise. Rather, we would deal in orders of magnitude. To evaluate the options we use a tool which has proven very effective. Essentially it is a matrix. In this case we would judge each option against a number of criteria in two groupings. These would be:

- o attractiveness of the opportunity; and
- o ease of implementation.

The options evaluated as being closest to the top left-hand corner would be the most attractive. Each criteria or sub-criteria can be weighted. We work best when we have client input into both the criteria and weightings. One of the advantages of this tool is that it allows both objective and subjective judgement to be included.

We would review each option with you but would also provide a recommendation with a justification. The final choice of option would be yours but we would like the chance to be part of your decision. After review we would provide further detail on the chosen option.

C. STRATEGIC PLANNING

In this step we would map out the activities required to implement the chosen option. The role of each party would be noted as would

each required activity. This would take the form of an outline plan. It would contain sufficient detail for you to identify the major activities and which group would take responsibility for them, but further work would be required by these groups prior to implementation.

The study would be completed by the preparation of a full report of our findings and recommendations. If required, the report would be supplemented by user friendly computer programs on diskette.

While we know the ADB well and will be using well proven techniques, the study will be made complex by the structure of the execution of Bank funded projects and it will be challenging because of the requirement for early reporting. These conditions are not new to us as we will show in the summary of our qualifications which follows.

EXAMPLES OF OUR EXPERIENCE IN EXPORTING STRATEGIES

- o The research of markets and development of strategies for the export of Canadian agricultural equipment ✓
- o The development of world-wide strategies for a U.S. photocopier and office automation supplier ✓
- o An evaluation of the offshore promotional activities of the Council of Forest Industries of B.C. ✓
- o A study of the feasibility of forming the Canadian International Construction Consortium to market Canadian capital project construction services offshore ✓
- o Current work which involves identification of opportunities for B.C. Consulting Engineers to increase sales domestically and offshore
- o Organizing a trade mission for Trinidadian manufacturers to the U.S.A.
- o Advice in strategic planning to Johnson & Johnson companies in 15 countries ✓
- o Export marketing advice to a rolling stock manufacturer ✓
- o Development of export strategies for a software producer ✓
- o Development of world-wide strategy for a Canadian manufacturer of health care products ✓
- o Completion of a feasibility study and development of complete international business strategies for a multi-use tourism development in the Middle East
- o Advice on export marketing strategies to a manufacturer of mining equipment ✓
- o Advice on international and domestic strategies to a Canadian producer of sophisticated computerized sawmilling equipment

V. OUR QUALIFICATIONS

The Coopers & Lybrand Consulting Group is part of the Canadian Coopers & Lybrand partnership. We are the largest full-service management consulting firm in Canada with a professional staff of over 250.

We are also a member of Coopers & Lybrand International and as such have full access to the C&L member located in the Philippines.

We have already discussed our knowledge of the Asian Development Bank. We are also familiar with many countries in the region. We have recently completed a major project in Indonesia and will soon start another in Thailand. We are now completing for CIDA an evaluation and operational audit of Technonet Asia which took us to many of the Bank's recipient countries. Coopers & Lybrand International was the first firm of its type invited to set up offices in the Peoples Republic of China and there are now offices in three cities. Our Canadian firm has conducted projects for the Government of the Peoples Republic. In the past two years we have had consultants operating in each sub-region serviced by the Asian Development Bank.

Our ability to conduct research on the Bank's purchasing history, intentions and practices is excellent. This is matched by extensive experience in business and marketing strategy development for Canadian companies.

Many of these assignments have included or focussed on export strategies. Some relevant examples are shown on the facing page. These are only a few of well over one hundred assignments, many of which have been complex and some involving several man years of work and encompassing research in many countries. But equally important, we

know the broad spectrum of Canadian business, its capabilities, strengths and weaknesses and can place exporting in the perspective of their total business endeavours.

Finally, we have worked with governments on many occasions in developing strategies to influence the expansion of the private sector. Our work in this regard has included assignments for the Federal Government and all Provincial Governments. The industry sectors have been wide-ranging from space technology to resources products.

This firm experience is reflected in the team chosen for the assignment.

VI. THE PROPOSED CONSULTING TEAM

The team would consist of four people. It would be led by Douglas R. Halliday.

Mr. Halliday is the partner in our firm responsible for our relations with the Asian Development Bank. He also holds responsibility for our Vancouver consulting practice, for our Strategic Management practice in Western Canada and for our relationships with European-based lending agencies. He has a degree in business from the University of Strathclyde in Scotland. While there he was involved in studies of non-quantifiable factors of industrial purchasing behaviour.

Mr. Halliday has 15 years consulting experience and received his early training in marketing with Colgate-Palmolive and General Foods. Over the last ten years he has specialized in business strategy development and during the last five on the application of strategic management principles to economic development for governments. Mr. Halliday was involved in all but two of the projects quoted under our firm's experience. In our project relating to the Middle East multi-use resort project, which he supervised, he worked with a Canadian consulting engineering firm in sourcing all products including construction materials, hotel and casino furniture and fixtures, all products related to energy generation, irrigation, water supply and sewerage, fire protection and other municipal services. He is also the Partner responsible for the evaluation of Technonet Asia on behalf of CIDA.

He has travelled extensively in Europe, the Middle East and South East Asia. He has also represented Canada on a Trade Mission to Zimbabwe and received members of foreign Trade Missions to Canada.

He was last in Manila this past December and enjoys a personal relationship with several ADB staff members. His role in this assignment would be:

- overall planning;
- detailed direction on how the work should be executed;
- making personal introductions;
- input into the conceptual analysis;
- participation in the review of strategic choices and strategic planning; and
- quality control throughout the assignment.

We considered having Mr. Halliday visit Manila as part of the data collection team but feel it would not be cost-effective and unnecessary as the team contains another member with ADB knowledge and Mr. Halliday's supplemental knowledge can be transferred.

Day-to-day supervision of the work would rest with Howard Harowitz. Mr. Harowitz is a Principal located in our Vancouver office. He holds a degree in economics from the University of British Columbia and an MBA from Stanford. He is a specialist in strategic management and, like Mr. Halliday, has for the past few years been exploring the application of this field to governments' endeavours in economic development. He is responsible for our relations with a number of Government agencies and is well experienced in both determining purchasing intentions and in conducting "post-mortems". Mr. Harowitz has advanced skills in computer model building and is known for his ability to construct "user-friendly" models for marketing and business strategy applications. His experience includes:

- o Developed a monitoring system for 25 countries for a Canadian bank regarding its loan portfolio;
- o Developed an international framework for export strategies for a major resource-based Canadian conglomerate;

- o Is currently conducting a search for new domestic or export opportunities for B.C.-based consulting engineers;
- o Developed export marketing strategies for a Canadian manufacturer of oil well drilling supplies;
- o Investigated foreign opportunities for commercial and industrial lending for a Canadian chartered bank;
- o Has conducted market research studies and developed strategies for a large range of product categories;
- o Has constructed economic development strategies for a number of governments in a broad range of industrial sectors;
- o Conducted a study of the effect of taxation on the relative competitiveness of coal producers in Canada, the U.S., Australia and South Africa.

In many cases Mr. Harowitz supervised the assignments as well as operated on them. Most of his work has involved the use of computer models to simplify the analysis of large amounts of complex data.

Beyond his maturity and business experience, Mr. Harowitz's key qualifications for this assignment are his creativity, logic and tenacity. He has the drive, energy and supervisory experience to get this assignment completed on time and with very high quality.

Mr. Harowitz has lived and worked outside Canada for extended periods. He has not worked in the Asian region but we do not feel this is critical. His role will include day-to-day supervision in Canada and Manila, plus direct participation in all phases of the project including computer modelling.

Don Moors, a manager resident in our Ottawa office, will act as an operating consultant on this project. He is an evaluation specialist within our Strategic Management Group and most often applies his skills on behalf of Government. He was the lead consultant on our evaluation of Technonet Asia for CIDA and visited the Asian Development Bank while in Manila in late November. He is familiar with Manila, the Bank's premises and many of its staff.

Mr. Moors' role will focus on the Assessment and Strategic Choice phases. He will also provide local liaison in Ottawa. His relevant experience includes:

- o An evaluation of Technonet Asia for CIDA. This included the study of the impacts of Technonet Asia on business development opportunities for Canadian manufacturers. Part of this was to examine the:
 - marketing strengths;
 - strategies for joint venture; and
 - market communication and promotion-strength of Canadian business.

His work took him to six countries in the Asian region for meetings with Government and business leaders.

- o For DRIE, a major evaluation of the effect of the Community Industrial Adjustment Program on business development in Canada. This involved primary research with manufacturers, producers, wholesalers and suppliers across all industry sectors.
- o For D.S.S., conducted a cross Canada study of print suppliers.

- o For Correctional Services Canada, completed a major analysis and evaluation of its procurement, stores and distribution activities at the national, regional and local levels.
- o Developed offshore training programs for an international banking group.

Mr. Moors is a senior research specialist with extensive evaluation experience and very relevant and current experience in the region.

Bert Zethof is a consultant in our Vancouver office. He specializes in industrial and commercial marketing strategy development and feasibility studies and has particular expertise in the construction industry. Prior to joining our firm, he was Manager of Corporate Planning for the Canadian Division of a large multi-national construction firm. Between his undergraduate degree and his MBA, he spent two years with the Ministry of Industry and Small Business in British Columbia. Mr. Zethof's role would primarily be data collection in Canada and Manila. The experience which qualifies him for this role is:

- o Several market research studies for Canadian companies involving export and domestic markets;
- o A international study into comparative production and marketing costs and their effect on the competitiveness of five industry sectors. This involved highly sensitive interviews to determine cost structures for Canadian and U.S. firms serving domestic and international markets;
- o Analysis of the impact of an increase in U.S. tariffs on 12 major Canadian export product categories. This involved an extensive interview program;

- o Several studies of economic development at the regional level;
- o Preparation of international marketing strategy for a Canadian manufacturer of light rail urban transit vehicles.

Mr. Zethof is an experienced interviewer, having conducted several interview programs involving complex and sensitive subjects across North America. He is fluent in English and Dutch.

This team combines a wide range of industrial backgrounds together with a consistent thread of a knowledge of government, economic development, and strategic management. It also has direct current knowledge of the Bank at both the supervisory and operating levels.

In choosing our team we recognized that a great many skill and experience areas required coverage. We feel seven are critical. They are:

- o highly developed skills in quantitative and qualitative research of buying behaviour;
- o sophisticated computer analysis experience;
- o practical experience in constructing government economic development programs;
- o broad experience in the development of export marketing strategies;
- o a good knowledge of Federal Government program evaluation;
- o knowledge of the Asian Development Bank;

CRITERIA

	QUANTITATIVE AND QUALITATIVE RESEARCH OF PURCHASING BEHAVIOUR	SOPHISTICATED COMPUTER ANALYSIS EXPERIENCE	EXPERT IN GOVERNMENT PROGRAM DEVELOPMENT	EXPERT IN EXPORT MARKETING STRATEGY DEVELOPMENT	EXPERT IN FEDERAL GOVERNMENT PROGRAM EVALUATION	KNOWLEDGE OF ASIAN DEVELOPMENT BANK	BROAD KNOWLEDGE OF CANADIAN INDUSTRY	DEEP EXPERIENCE WITH COMPLEX RESEARCH PROJECTS
D. R. HALLIDAY	**		**	**	*	**	**	**
H. G. HAROWITZ	**	**	**	**			**	**
D. MOORS	*		**		**	*	*	**
B. ZETHOF	*	*	*	*			*	*

* operating experience

** extensive in-depth experience as an operator and supervisor

- o broad knowledge of Canadian Industry; and
- o deep expertise in export marketing strategy development.

On the facing page we show how our proposed team meets these criteria. Further information is given in their resumes in Appendix II.

We believe this team has the skills and knowledge to be effective on your behalf.

TIME AND FEE ESTIMATE

TIME REQUIRED IN DAYS

	<u>Halliday</u>	<u>Harowitz</u>	<u>Moors</u>	<u>Zethof</u>	<u>Technical Support</u>	<u>Timing</u>
1. Prepare detailed plan	1/2	1	-	-	-	Jan.20
2. Prepare manufacturers questionnaire and letter	1/4	1/2	-	1/2	-	Jan.21
3. Prepare project data sheets	1/4	1/4	-	1	-	Jan.21
4. First client meeting in Ottawa	1-1/4	1-1/4	1	-	-	Jan.23
5. Conduct interviews with DEA, CIDA, DRIE, CCC	1	1	1	-	-	Jan.24
6. Amend questionnaires, data sheets	*	1/4	-	1/2	-	Jan.27
7. Arrange mailing of manufacturers questionnaire	*	*	-	1	0	Jan.28
8. Arrange for ADB visit	1	2	1	-	-	Jan.29 30 31
9. Briefing, interviews and data collection at ADB	1	17	17	16	-	Feb.7-28
10. Interview manufacturers and prepare mini-report	*	1/4	-	8	-	Mar.3-12
11. Interview Consulting Engineers.	-	1-1/2	-	-	-	Mar.4&5
12. Preparation of Computer Analysis	*	2	-	-	15	Mar.3-21
13. Preparation of Assessment	2	10	8	10	-	Mar.10-24
14. Analysis of Options	1	5	1	10	-	Mar.24- Apr. 7
15. Client Meeting	1-1/4	1-1/4	1/2	-	-	Apr. 9
16. Preparation of Strategy	1/2	3	-	2	-	Apr. 10 11 14

VII. FEES AND TIMING

We do not feel this assignment can be successfully completed by March 31, 1986. Key time points in our program, as well as level of effort, are shown on the facing page and that facing the following page.

Assuming a project start date of January 20, 1986, we would be in the field in Manila between February 7 and February 28, 1986. The Assessment phase would be completed by March 24, 1986 and a meeting on this phase and the analysis of options could take place in Ottawa on April 9, 1986. A draft final report could be in your hands by April 22, 1986 and a final version the following week.

*21 days
15 working
days*

We have examined this work program critically to determine where savings in effort or time could be made and find none. We are also confident, however, that the work can be completed by these dates. The only contingency we felt necessary to build into the plan is for extra time in Manila. We plan to have three consultants in Manila for three working weeks. However, we know from experience that not all Bank staff are available when we need them. If used, this contingency would delay the project a minimum of two and a maximum of five working days. Approximately 80% of the work will occur prior to March 31, 1986 and 89% by April 15, 1986.

The criticality of the data collection work in Manila is reflected by our use of a contingency in the plan.

The specific activities to be undertaken in Manila are:

- o Review approximately 250 files and extract data with reference to staff, if required 15 days

TIME REQUIRED IN DAYS

	Halliday	Harowitz	Moors	Zetkof	Technical Support	Timing
17. Preparation of Draft Final Report	1	5	1/2	1	-	Apr/15-21
18. Client Meeting	1-1/4	1-1/4	-	-	-	Apr.23
19. Report Finalization	1/4	1	-	-	-	Apr.24
20. Document Computer Program	-	2	-	-	5	Apr.28-May 2
21. Assignment Administration	3	-	-	-	-	
TOTAL DAYS:	15-1/2	55-1/2	30	51	20	172
DAILY FEE RATES:	\$1,050	\$900	\$825	\$675	\$375	
	\$16,725	\$49,950	\$24,750	\$34,425	\$7,500	

TOTAL FEES: 133,350
 CONTINGENCY: 4,500
\$137,850

* involvement of less than one hour

- Interview Bank staff to discuss the success or failure of 20 Canadian bids 3-4 days
- Interview Bank staff for details of co-financing over the past three years. These totalled about 60 projects of which we expect 30-40 will have accessible information. 4-6 days
- Meet with Bank staff to investigate forward project plans. In the order of 100 interviews may be required including a few devoted solely to co-financing rather than project specifics. 20 days

To be effective will require excellent knowledge of what we want and where to get it. It will also require easy access to ADB staff. In this regard, we ask that the Director for Canada obtain for us work space within the main ADB building with telephone facilities. This will allow us to make most effective use of our time, in such ways as using the telephone for follow-up information or to brief Bank staff on our requirements prior to our meetings.

We believe the assignment would require fees of \$133,350 at our normal Government of Canada rates which are the lowest we offer. This is based on the detailed time estimates already given. It does not include the contingency figure of up to \$4,500 which is specifically to provide for an extra weeks' stay for one person in Manila. This contingency would only be used if activities, which could not be conducted by the Manila Post, required one of our consultants to stay longer in Manila.

Expenses would be additional and charged at cost. An estimate of expenses is shown facing the following page. Again, a contingency is shown.

ESTIMATE OF EXPENSES

1. Telephone and Telex	\$1,500
2. Airfare to Ottawa - 6 x approx. \$1,000	6,000
3. Hotel Meals and Taxi	700
4. Airfares to Manila - 2 x \$2,606 - 1 x \$3,276	8,488
5. Departure Taxes	175
6. Hotel Costs in Manila - 3 X 20 days @ \$66.00 US	5,700
7. Meal Costs - 3 X 20 days @ \$50	3,000
8. Taxi Fares in Manila	400
9. Report Preparation	<u>3,000</u>
	\$29,000
Contingency for 6 extra days in Manila	\$900

Omission:

Telephone + mailing 50 companies.

Airfares have been based on published tariffs for Business Class using Canadian carriers where possible. Hotel accommodation in Manila represents the best rates which can be negotiated by the Embassy in Manila for the Philippine Plaza, a Westin Hotel. This hotel is neither the least nor the most expensive, is conveniently located near ADB headquarters and provides a pleasant environment for after hours work.

You have asked for separate price proposals for each segment of the work outlined in the Terms of Reference. Because of the methods we propose to use the savings would be limited.

The elimination of ^{*Co-financing*} 2.2 would save only the interview time on getting details of past co-financing and future possibilities. We estimate the savings to be in the order of eight man days valued at approximately \$7,000. With savings in expenses, the total cost might be reduced by \$8,000. Section 2.3 can be eliminated easily. It is a discrete segment valued at \$3,675. *Information*

Our fee quotations, therefore, are:

- o For 2.1 fees of \$122,000 with a contingency of up to \$4,500 and expenses at cost.
- o For 2.1 plus 2.2 fees of \$130,000 with a contingency of up to \$4,500 and expenses at cost.
- o For 2.1 plus 2.2 and 2.3 if required we are willing to complete the work for a fixed price of \$132,000 without contingency plus expenses at cost.

In all cases we reserve the right to withdraw our staff to return to Canada or to wait in a suitable location at your cost should, in our judgement or theirs, changing events place them in danger.

Despite this last qualification, we feel confident in our abilities to conduct this work. We recognize that the study is at once both straightforward and complex. Straightforward in that the objective is clear and the necessary techniques to achieve it are proven and familiar to us. But complex because of the amount of data, the potential difficulty of accessing it, and the need to exercise discipline in managing the project to tight deadlines. We feel it is a challenging project and would like to undertake it. We are available to discuss our proposal.



Douglas R. Halliday

THE COOPERS & LYBRAND CONSULTING GROUP

APPENDIX I

List of Management and Professional Staff

ASIAN DEVELOPMENT BANK
Office of the Secretary

29 October 1985

To : Executive Directors and Alternate Executive Directors
From : Secretary

List of Management and Professional Staff

The attached list of Management and Professional Staff (without nationalities) as of 30 September 1985 is circulated for the information of the Board.

2. Additional copies of the list are available in Room 1207.

**ORGANIZATIONAL LISTING
MANAGEMENT AND PROFESSIONAL STAFF
(As of 30 September 1985)**

I. OFFICE OF THE PRESIDENT

President	— Masao Fujioka
Vice President	— A.T. Bambawale
Vice President	— S. Stanley Katz
Vice President	— Günther Schulz
Personal Assistant to the President	— Masakazu Sakaguchi

II. OFFICE OF THE SECRETARY

Secretary	— Arun B. Adarkar
Assistant Secretary	— Richard H. Gardner
Secretariat Officer	— Adrian M. Aylott
Secretariat Officer	— John Cole
Secretariat Officer	— Victoria J. Corner
Secretariat Officer	— Farrokh E. Kapadia
Secretariat Officer	— P. K. Singh

III. OFFICE OF THE GENERAL COUNSEL

General Counsel	— Chun Pyo Jhong
Assistant General Counsel	— Ramdass K. Keswani
Assistant General Counsel	— Herbert V. Morals
Assistant General Counsel	— Peter H. Sullivan
Senior Counsel	— D. C. Amerasinghe
Senior Counsel	— Robert E. Bares
Senior Counsel	— John A. Boyd
Senior Counsel	— Bruce A. Purdue
Senior Counsel	— Eisuke Suzuki
Senior Counsel	— Pablo S. Trillana III
Counsel	— Moon Soo Chung
Counsel	— Pierre-Bouvet de Maisonneuve
Counsel	— Richard Eyre
Counsel	— Manuel Lino G. Faenar
Counsel	— Mohan Gopal
Counsel	— John W. Head
Counsel	— Ferdinand P. Mesch
Counsel	— Afzal H. Mufti
Counsel	— Douglas A. Webb

IV. COUNTRY DEPARTMENT

Director	— Robert N. Bakley
Deputy Director	— Klaus J. L. Hoffarth
Deputy Director	— Sayed Baha
Executive Officer	— Christine Claasz
Senior Programming Officer	— Tarik S. Jaffrey
Senior Economist	— Richard O. Wada
Senior Economist	— Lo Sum Yee
Country Officer	— V. K. Shunglu

Co-Financing Unit

Co-Financing Manager	— Eiichi Watanabe
Senior Co-Financing Officer	— Randolph Earman, Jr.
Co-Financing Officer	— Anthony E. C. Kuek

Division I (Afghanistan, Maldives, Pakistan, Sri Lanka)

Country Manager	— Grahame Muller
Senior Country Officer	— Dihn Xuan Vinh
Senior Country Officer	— Nikhilesh Prasad
Country Officer	— Shigeru Koga
Country Officer	— John P. Rive
Economist	— Ken Tanimura
Economist	— Truong Quang Canh
Economist	— Yasuo Uchida
Young Professional	— Jeeva Perumalpillai
Young Professional	— James H. Sparrow

Division II (Bangladesh, Bhutan, India, Nepal)

Country Manager	— Paul G. Krukowski
Senior Country Officer	— Bhanuphol Horayangura
Senior Country Officer	— Dalheue Coue
Senior Country Officer	— Duleep Singh
Senior Country Officer	— Peter von Brevern
Country Program Officer	— Motochika Toyama
Country Officer	— Sachiko Natsume
Senior Economist	— Arturo Y. Consing
Economist	— Paul B. McCabe

Division III (Burma, Cambodia, Laos, Thailand, Viet Nam)

Country Manager	— Noritada Morita
Senior Country Officer	— Fred Phillips
Senior Country Officer	— Ricardo M. Tan
Country Program Officer	— T. L. de Jonghe
Country Program Officer	— Stephen R. Whitmer
Country Officer	— Masataka Imamura

Senior Economist
Economist
Economist
Young Professional

— Dietrich Bergmeier
— Evelyn M. Go*
— Jan Rudengren
— Pierre Bouvery

Division IV (Rep. of China, Korea, Philippines)

Country Manager
Senior Country Officer
Senior Country Officer
Senior Country Officer
Senior Country Officer
Country Program Officer
Country Officer
Senior Economist
Economist

— Elji Kobayashi
— Gerhard H. Kahl
— M. Mustufa Ali Khan
— Prot Panitpakdi
— Thomas P. Walsh
— Marshuk Ali Shah
— Karl L. Bruce
— William R. Winning
— K.H. Moinuddin

Division V (Hong Kong, Indonesia, Malaysia, Singapore)

Country Manager
Senior Country Officer
Senior Country Officer
Senior Country Officer
Senior Country Officer
Senior Country Officer
Country Program Officer
Country Officer
Senior Economist
Economist

— Sharda P. Srivastava
— J. C. Alexander
— Masud Mufti
— Kenneth H. McNeely
— Chaichan Sakharet
— R. Swaminathan
— Herman Schempp
— Michael G. Essex
— Lal Ah Hoon
— David Edwards

Division VI (South Pacific)

Acting Manager
Senior Country Officer
Country Program Officer
Country Officer
Senior Economist
Economist

— Osman R. I. Bako
— Muhammad Ahmed
— Omkar Lal Shrestha
— Olin S. Ward
— Hwa Jin Youn
— Ko Kwang Huh

V. DEVELOPMENT POLICY OFFICE

Chief
Manager
Senior Development Policy Officer
Senior Development Policy Officer
Senior Development Policy Officer
Senior Development Policy Officer
Development Policy Officer
Development Policy Officer
Development Policy Officer
Development Policy Officer
Young Professional

— S. Mahboob Alam
— William T. C. Ho
— M. D. Godbole
— Keiichiro Hideshima
— Werner M. Scheizig
— Heh-Song Wang
— Roger I. Gale
— John P. Garrity
— Stephen M. Taran
— Hiroyuki Yanagitsubo
— Rajiv B. Lall

*Temporary transfer

VI. AGRICULTURE DEPARTMENT

Director	— Soeksmono B. Martokoesoemo
Deputy Director	— E. Frank Tacke
Senior Executive Officer	— Gene M. Owens
Senior Sector Planning Specialist	— Nihal Amerasinghe
Senior Project Administration Specialist	— Mauritsz L. J. Cannon
Economist	— Barry V. Lanler

Agro-Industries and Forestry Division

Manager	— Musunuru S. Rao
Senior Agronomist	— Dimyati Nangju
Agronomist	— J. A. Rajaratnam
Agronomist	— Yoshihiro Takano
Senior Forestry Specialist	— Barin N. Ganguli
Forestry Specialist	— Lars Gunnar Biomkvist
Forestry Specialist	— Oscar A. Gendrano
Senior Mechanical Engineer	— Len Swee Chooi
Project Engineer	— Sarojkumar Thuraisingham
Senior Project Economist	— Dieter Lepper
Project Economist	— Ivan Ruzicka
Senior Financial Analyst	— Nguyen Kim Long
Senior Financial Analyst	— Hans-Juergen Springer
Financial Analyst	— Yukio Ito
Financial Analyst	— Peter J. Nelson
Young Professional	— Hyong Jong Yu

Fisheries and Livestock Division

Manager	— Basudev Dahal
Senior Fishery Specialist	— Yong-ki Shin
Fishery Specialist	— Thein Tun Ngwe
Fishery Specialist	— Ernst Petersen
Senior Aquaculture Specialist	— Robert C. May
Aquaculture Specialist	— Masaki Higuchi
Senior Livestock Specialist	— Justin K. Camoens
Livestock Specialist	— Peter N. Carroll
Livestock Specialist	— Suntraporn Na Phuket
Senior Project Engineer	— Tord A. Rosengren
Senior Project Economist	— Robert E. Hood
Senior Financial Analyst	— Robustiano L. Espiritu, Jr.
Senior Financial Analyst	— A. A. Sidarto
Financial Analyst	— Taijro Kojima
Financial Analyst	— Kazuyuki Nagao

Agricultural Support Services Division

Manager	— A. I. Aminul Islam ✓
Senior Agronomist	— A. K. Auckland
Senior Agronomist	— C. de Burgh Codrington
Agronomist	— Souphanh Savady

Senior Land Use Specialist	— Peter Thomas
Senior Agricultural Credit Specialist	— Paul Mampilly
Agricultural Credit Specialist	— Y.L. Bhat
Agricultural Credit/Development Bank Specialist	— A. Maurice de Alwis
Agro-Processing Engineer	— Brian H. Webb
Project Engineer (Mechanical)	— Adrianus G. Rijk
Project Engineer (Irrigation)	— A.F.M. Shamsul Alam
Project Engineer	— S. Selvaretnam
Project Economist	— John R. Shaw
Project Economist	— Harpal Singh
Financial Analyst	— Benny S. Kosinda

VII. IRRIGATION AND RURAL DEVELOPMENT DEPARTMENT

Director	— Kunio Takase
Deputy Director	— M. Zaki Azam
Senior Executive Officer	— Alan L. May
Senior Sector Planning Specialist	— Shoji Nishimoto
Senior Project Administration Specialist	— John P. Bond
Senior PBME Specialist	— William J. Staub

Division I

Manager	— Satish C. Jha
Institution Development Specialist	— Cedric D. Saldanha
Senior Agronomist	— C. J. Beresford-Jones
Senior Agronomist	— Shiraj H. Khan
Senior Project Engineer (Mechanical)	— Chul Choo Lee
Senior Project Engineer (Irrigation)	— K.S. Sarma
Senior Project Engineer (Irrigation)	— Akira Seki
Project Engineer (Irrigation)	— Toru Shibuichi
Project Engineer (Irrigation)	— Jan P.M. van Heeswijk
Project Engineer (Civil)	— Pin Yathay
Senior Project Economist	— Naseer Ahmad
Senior Project Economist	— Frank J. Polman
Project Economist	— Habibullah Habib
Project Economist	— Jonathan H. Roberts
Financial Analyst	— Julius P. Ordoña

Division II

Manager	— Richard M. Bradley
Senior Agronomist	— M. E. Tusneem
Senior Agronomist	— M.F.W. Zijsveld
Agronomist	— Lim Kim Lin
Senior Project Engineer (Irrigation)	— Salyid Ali Naqvi
Senior Project Engineer (Irrigation)	— Theodore C. Patterson
Project Engineer (Irrigation)	— Tetsuro Miyazato

Project Engineer (Irrigation)
 Project Engineer (Irrigation)
 Project Engineer (Civil)
 Senior Project Economist
 Project Economist
 Project Economist
 Project Economist
 Project Economist
 Young Professional

— M. Jamilur Rahman
 — Pieter M. Smidt
 — John P. Keefe
 — G. M. Walter
 — Carl B. Amerling
 — Mrigendramani Dixit
 — Muhammad A. Mannan
 — Tsuneaki Yoshida
 — Haruya Koide

Division III

Manager
 Senior Agronomist
 Agronomist
 Agronomist
 Senior Project Engineer (Irrigation)
 Project Engineer (Irrigation)
 Project Engineer (Irrigation)
 Senior Project Economist
 Senior Project Economist
 Senior Project Economist
 Project Economist
 Financial Analyst
 Young Professional

— Eun Jin Lim
 — Edward Breckner
 — Jay H. Chung
 — Antonio T. Perez
 — Precha Kulapongse
 — Ko Hai-Sheng
 — Katsuji Matsunami
 — Remigio D. Torres
 — T. K. Jayaraman
 — Someth Suos
 — Nguyen An Nhon
 — Jesus F. Zarandin
 — Kunio Senga

VIII. INFRASTRUCTURE DEPARTMENT

Director
 Deputy Director
 Executive Officer
 Senior Environmental Specialist
 Environmental Specialist
 Senior Sector Planning Specialist
 Senior Project Engineer
 Project Economist
 Economist

— S.V.S. Juneja
 — Neil R. Collier
 — Gordon E. Wilkinson
 — Colin P. Rees
 — B. N. Lohani
 — Ian G. Heggie
 — Nalin P. Samarasinghe
 — Inderjit Marwah
 — Jean-Pierre Dumas

Airports and Highways Division

Manager
 Senior Project Engineer
 Senior Project Engineer
 Senior Project Engineer
 Senior Project Engineer
 Project Engineer
 Project Engineer
 Project Engineer
 Project Engineer
 Project Engineer
 Senior Project Economist
 Project Economist
 Project Economist
 Project Economist

— Mahesan Ganesan
 — John M. Eddison
 — B. K. Gupta
 — Francis Sharpley
 — P. K. Thomas
 — H. M. Amatya
 — Hajime Ikeda
 — Jin Koo Lee
 — Harmannus S. Van Brummelen
 — Asao Yamakawa
 — Thomas F. Jones III
 — Peter C. Darjes
 — Charles M. Melhuish
 — Preben Nielsen

Ports, Railways and Telecommunications Division

Manager	— Yuzo Akatsuka
Shipping Specialist	— John F. Brooks
Port Operations Specialist	— Andrew Chan
Senior Project Engineer	— R. K. Banerjee
Senior Project Engineer	— Aulis J. Makitalo
Senior Project Engineer	— Devinder Singh
Project Engineer	— Tadashi Kondo
Project Engineer	— Tadahiko Yagyu
Project Engineer (Telecommunications)	— Yoshiro Takano
Senior Project Economist	— Gunter Hecker
Senior Project Economist	— Eustace A. Nonis
Project Economist	— Bruce Murray
Senior Financial Analyst	— Peter S. Hanton

Water Supply Division

Manager	— Javier M. Gomez
Senior Project Engineer	— Alex F. Knudsen
Senior Project Engineer	— Ranjlth Wlrasinha
Project Engineer	— Charoen Bunchandranon
Project Engineer	— Goh Gin Han
Project Engineer	— Shean-Lun Liu
Project Engineer	— Arthur C. McIntosh
Project Engineer	— Sermpol Ratasuk
Project Engineer	— Nick Semenluk
Project Engineer	— Katsuyoshi Tomono
Project Engineer	— T. K. Vedaraman
Project Economist	— Peter J. Wallum
Financial Analyst	— Woo Chull Chung
Financial Analyst	— Ryuhei Mimura
Financial Analyst	— Jarmo Myllyrinne
Financial Analyst	— Motoharu Usuki

Social Infrastructure Division

Manager	— Mazhar Ali Khan
Senior Urban Development Specialist	— Bong Koo Lee
Urban Development Specialist	— Hiroyoshi Kurlhara
Urban Development Specialist	— Asad Ali Shah
Urban Development Specialist	— Jeffry R. Stubbs
Senior Health Specialist	— Albert Sales
Senior Project Economist	— G.H.P.B. van der Linden
Project Economist	— Lancelot X. D'Ursei
Economist/Demographer	— Christopher Walker
Senior Financial Analyst	— William M. Fraser
Young Professional	— Edgar A. Cua

Education Division

Manager

Senior Education Specialist
Senior Education Specialist
Senior Education Specialist
Senior Education Specialist
Senior Education Specialist
Education Specialist
Education Specialist
Education Specialist
Education Specialist
Education Specialist
Project Engineer
Project Economist

— Charles J. Leven
— John Latini
— V. Murugasu
— Tin Maung Oo
— Petrie L. Simington
— William Webb
— James Lahren
— Donald W. Mummery
— David A. Pedersen
— Motilal Sharma
— Wolfgang P. Teschner
— Barry W. Adler
— Manuel P. Perlas

IX. INDUSTRY AND DEVELOPMENT BANKS DEPARTMENT

Director

Deputy Director

Senior Executive Officer
Senior Financial Specialist

— Akira Tsusaka
— Stephen Y.C. Lau
— Francisco D. Hermano
— Charles F. Coe

Equity Investment Unit

Investment Officer
Investment Officer

— Michael B. Briggs
— Hironori Tsuchiya

Energy Planning Unit

Energy Adviser

Senior Energy Specialist
Senior Energy Specialist
Senior Energy Specialist
Energy Specialist
Project Engineer

— Jayanta Madhab
— Vishvanath Desai
— Seung Yoon Rhee
— S. B. Sri-Skanda Rajah
— Kenneth King
— Karl Nyman

Training Assistance Section

Senior Development Bank Specialist
conc. Head, TAS
Senior Project Economist
Training Specialist
Training Specialist

— Abul Hasnat
— Charles A. Njlo
— Alicia Maclan
— Edmond B. Pereira

Industry and Minerals Division

Manager

Senior Project Geologist

— Alberto M. Balagot
— Harald F. Hajek

Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Project Engineer
Project Engineer
Project Engineer
Project Engineer
Senior Project Economist
Project Economist
Financial Analyst
Financial Analyst
Financial Analyst
Project Officer (Minerals)
Young Professional

— Eugene Y.W. Chen
— Chua Suay Bah
— Chong-Serp Chung
— Viggo A. Groope
— Rolf B. Westling
— Sadlq H. Zaldi
— Syed Zeyaul Hoda
— Aminul Huq
— Benny C. Kwong
— Giorgio Sparaci
— Morimitsu Inaba
— Peter C. Brinkmann
— Yasunori Homma
— Mitsuru Mizuno
— Robert J. Montgomery
— Edu H. Hassing
— Urooj Malik

Power Division East

Manager
Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Senior Project Engineer
Project Engineer
Project Engineer
Senior Financial Analyst/Economist
Financial Analyst
Financial Analyst
Financial Analyst

— V. S. Rao
— Vladimir Bohun
— Michael Charleson
— Latif M. Chaudhry
— Peter J. Hunt
— James E. Rockett
— Ariakuty Ganesan
— K. Venkataraman
— R. S. Rungta
— William D. Ferguson
— Jesus G. Lapitan
— Danu P. Pangestu

Power Division West

Manager
Senior Project Engineer
Senior Project Engineer
Project Engineer
Project Engineer
Project Engineer
Project Engineer
Project Engineer
Project Engineer
Senior Project Economist
Project Economist
Financial Analyst

— Alan D. Burrell
— Tay Sin Yan
— T. V. Thadanl
— R. A. Addison
— P. N. Fernando
— Margono Hallmoen
— Lars Hultin
— Gunter Rametsteiner
— Gary Stuggins
— V. Krishnaswamy
— Thomas Crouch
— Robert J. Kay

Development Finance Division

Manager
Senior Development Bank Specialist

— Ivan L. Zimonyi
— Mumtaz Iqbal

Senior Development Bank Specialist
 Senior Development Bank Specialist
 Senior Development Bank Specialist
 Senior Development Bank Specialist
 Development Bank Specialist
 Development Bank Specialist
 Small-Scale Industries Specialist
 Industrial Engineer
 Senior Project Economist
 Project Economist
 Senior Financial Analyst
 Senior Financial Analyst
 Financial Analyst
 Financial Analyst
 Financial Analyst
 Financial Analyst
 Financial Analyst
 Financial Analyst
 Financial Analyst
 Project Officer (Loan Adm.)
 Young Professional

— Keon-Woo Lee
 — Shahid Mirza
 — M. S. Parthasarathy
 — J. Antonio M. Quila
 — K. L. Bagal
 — S. A. B. R. Thalakada
 — Atsutake Hashida
 — H. Satish Rao
 — John K. Chang
 — Young Baek Lee
 — Nils G.J. Ekehorn
 — In Keun Yoon
 — Koichiro Aral
 — Larry A. Boyer
 — Choong Thien Fong
 — Michael Davey
 — Ulf R. Freiwald
 — Romeo L. Hermoso
 — Hung Nguyen
 — Valerie San Lin
 — Nguyen Cam Khanh
 — Klatchai Sophastienphong

X. CENTRAL PROJECTS SERVICES OFFICE

Chief

— Lewis Hayashi

Consulting Services Division

Manager

Senior Consulting Services Specialist
 Senior Consulting Services Specialist
 Senior Consulting Services Specialist
 Consulting Services Specialist
 Consulting Services Specialist
 Consulting Services Specialist
 Consulting Services Specialist

— Urs Rolf Sieber
 — Niels A. Gernow
 — E. Kirkegaard Nielsen
 — Jean-Pierre Vu
 — Ronald K. Chan
 — Edi W. Kaswadi
 — D. I. Obeyesekere
 — Bruce C. Smith

Central Loan Administration Services Division

Manager

Senior Project Specialist
 Senior Project Specialist
 Senior Project Specialist
 Senior Project Specialist
 Project Specialist
 Project Specialist
 Project Specialist
 Senior Procurement Specialist

— N. Viswanathan
 — M.S.A.R. Ahmad
 — Amador F. Astudillo
 — Godavari Lal Maskay
 — Jahed-Ur Rahman
 — Ernesto Cataldi
 — Edward M. Haugh, Jr.
 — Shozo Kitta
 — Willem B. den Toom

Procurement Specialist
Procurement Specialist
Procurement Specialist
Senior Project Engineer

— Aung Tun
— Guy Delville
— Constantine Pappas
— Roy W. Hauge

XI. BANGLADESH RESIDENT OFFICE

Chief
Senior Project Engineer
Senior Implementation Officer
Program Officer

— Paul Koehling
— Minobu Horie
— Maurice D. Bauche
— Jacques M. Ferreira

XII. SOUTH PACIFIC REGIONAL OFFICE

Chief
Senior Project Engineer
Senior Country Officer/Economist

— Joaquin J. Gochoco
— William C. Hopper
— Kikuo Sakamoto

XIII. BUDGET, PERSONNEL AND MANAGEMENT SYSTEMS DEPARTMENT

Director
Deputy Director

— Hiroo Fukui
— Dang Fook Lee

Budget and Planning Division

Manager
Senior Budget and Planning Officer
Budget and Planning Officer
Budget and Planning Officer
Budget and Planning Officer

— William G. Brown
— Suresh A. Seshan
— Ping-Yung Chiu
— Sum Chong Hong
— Haruhiko Yamada

Personnel Division

Personnel Manager
Head, Employment and
Staff Relations Section
Employment Specialist
Employment Specialist
Employment Specialist
Employment Specialist
Employment Specialist
Head, Compensation and
Benefits Section
Benefits Specialist
Benefits Specialist
Benefits Specialist
Compensation Specialist
Personnel Officer (Compensation)
Head, Human Resource Planning
and Development Section
Training Specialist
Training Specialist

— John P. Kennedy
— Tony Wan
— Robert L. T. Dawson
— Ingemar K. Larson
— Ernst Mahel
— Alan Slew
— Sim Siang Heng
— Lim Say Hup
— Vincent Mak Wing-Cheong
— Benigno E. Serafica
— Wong Ching Hoe
— Vorakarn Punnahitananda
— Librado G. Victoriano
— Francois Lisack
— Hyun Shik Oh
— William C. Peterson

Head, Consultants Administration
Section
Personnel Officer
Personnel Officer

— Brian J. Williamson
— Edwin F. Hourihan
— Willy Y.C. Lim

Systems and Procedures Division

Acting Manager
Systems and Procedures Officer
Systems and Procedures Officer

— Phua Kok Heng
— D. A. Fitz-Herbert
— Virginia C. Sloson

XIV. OFFICE OF ADMINISTRATIVE SERVICES

Chief
Executive Officer
Head, Facilities Planning Unit

— Pyong Whi Min
— Ramesh Bhatia
— Khalid I. Rahman

Government Liaison and Security

Head, Government Liaison & Security
Administrative Officer

— John Ling
— Eduardo A. Formoso

General Services Division

Manager
Administrative Officer (Property Control)
Administrative Officer (Procurement)
Administrative Officer
Administrative Officer
Administrative Officer
Administrative Officer

— Hi Young Kim
— Theodore S. Green
— G. Ramachandran
— Andrea P. Carlos
— Mark A. Grant
— Bayani D. Paz
— Takao Watanabe

Building Services Division

Manager
Telecommunications Engineer
Head, Operations Section
Head, Contracts Unit
Building Services Engineer

— Ian F. Darroch
— Horst Lamers*
— Ailstair E. Kennedy
— Chin Chwoon Sam
— Seppo Leino

Travel and Shipping Section

Head

— David H. W. Edwards

Shipping and Licensing Unit

Administrative Officer (Shipping and
Licensing)

— Mark Heerwagen

* Position charged to Capital Expenditures.

Travel and Transport Unit

Administrative Officer — Gerald H. Robertson

XV. SPECIAL PROJECTS OFFICE*

Chief — Pradhan J. Prasad
Administrative Officer — John A.C. Stanbury
Senior Architect — John T. Eglington
Project Architect — Robert J. Robertson
Project Engineer (Mechanical/Electrical) — Peter L. Pattison
Project Engineer (Civil/Structural) — Stephen S. Uy
Financial Analyst — K. S. Subramanian

XVI. CONTROLLER'S DEPARTMENT

Controller — Ronald G. Rose
Control Officer — Lucy Anna Pandjaitan
Control Officer — David J. Snyder

Loans Division

Assistant Controller — Bernard Donge
Senior Control Officer
(Head, Co-Financing & Area Section 1) — George C. Chou
Senior Control Officer — Than Win
Control Officer — Alex V. Gordevich
Control Officer — Thevakumar Kandiah
Control Officer — Cuong M. Nguyen
Control Officer — Mohd. Sallehuddin Othman
Control Officer — Yutaka Sasaki
Control Officer — Yoong-Soo Seo

Accounting Division

Assistant Controller — Francis W. Mentus
Senior Control Officer — Felipe T. Fajardo
Control Officer — Ang Swee Tai
Control Officer — V.P. (Victor) Diem
Control Officer — Gabriel Ho-Tim Kay
Control Officer — Augusto R. Tulao

Administrative Expenses Division

Assistant Controller — Louis Wong
Senior Control Officer — Hla Aung
Control Officer (Head, Administrative
Expenses Unit) — Lazaro L. de la Cruz
Control Officer — Sultan Ahmad Chaudri
Control Officer — Julia Holz
Control Officer — Lourdes P. Medrana
Control Officer — Carmen Z. Wolfskill

* SPO staff (positions charged to Capital Expenditures).

XVII. TREASURER'S DEPARTMENT

Treasurer — Vacant
Deputy Treasurer — Yukiji Miyazaki

Treasury Operations Division

Assistant Treasurer — Albert L. Faber
Senior Treasury Officer — Ian M. Hay
Senior Treasury Officer — Erkki K. Jappinen
Senior Treasury Officer — Rip Min
Senior Treasury Officer — Ryoichi Miyata
Senior Treasury Officer — Roger D. M. Smith
Treasury Officer — Peter M. Balon
Treasury Officer — Jelle C. Mann

Treasury Services Division

Assistant Treasurer — Hiroyuki Yamamoto
Senior Treasury Officer — Chi-Chuan Hung
Treasury Officer conc. Executive Officer — May T. Lim
Treasury Officer — Yong-Duk Kim
Treasury Officer — Aurapin Sipper
Treasury Officer — Victor The
Treasury Officer — Tin Win
Treasury Officer — Yong Cheng

Financial Policy Division

Financial Advisor — Daud Ilyas
Treasury Officer (Financial Policy) — Hinahon L. Domingo
Treasury Officer (Financial Policy) — G.M.Z. Khan
Treasury Officer (Financial Policy) — David R. Parker

XVIII. ECONOMICS OFFICE

Chief Economist — Burnham O. Campbell
Assistant Chief Economist — Kedar N. Kohli
Assistant Chief Economist — Brlen K. Parkinson
Senior Economist — Graham J. Abbot
Senior Economist — A.H.M.N. Chowdhury
Senior Economist — J. Malcolm Dowling, Jr.
Senior Economist — Jungsoo Lee
Senior Economist — Mohandas K. Samuel
Economist — Ifzal Ali
Economist — Ba Lay
Economist — Dean A. DeRosa
Economist — Jean-Pierre Dumas*
Economist — Prabhakar B. Ghate
Economist — Yoshihiro Iwasaki
Economist — J. Keith Johnson

*Temporary transfer

Economist
 Economist
 Economist
 Head, Statistics Unit
 Senior Statistician
 Senior Statistician
 Statistician
 Head, Editing Unit
 Economics Editor
 Economics Editor
 Economics Editor
 Economics Editor
 Young Professional

— M. G. Qulbria
 — Pradumna B. Rana
 — David L. H. Soo
 — Isidoro P. David
 — Dal Hyun Kim
 — Mitsuo Ono
 — Jani Damiri
 — Sukh D. Singh
 — Frederick Lees
 — Erik N. Scarsborough
 — John S. Slipper
 — Mohan Sundara Rajan
 — Philip Charles Erquiaga

XIX. INFORMATION OFFICE

Chief Information Officer
 Assistant Chief Information Officer
 Senior Information Officer
 Senior Information Officer
 Senior Information Officer
 Senior Information Officer
 Senior Information Officer
 Information Officer

— P. S. Hariharan
 — Reynaldo D. Pacheco
 — Truman E. Becker
 — Arthur H. Cooke
 — George V. Liu
 — Yoshitsugu Matsuura
 — Robert H. Salamon
 — K. Rudolf Jonker

XX. OFFICE OF COMPUTER SERVICES

Chief
 Assistant Chief
 Senior Computer Systems Specialist
 (Head, Computer Operations)
 Senior Computer Systems Specialist
 (Data Base Administrator)
 Senior Computer Systems Specialist
 (Systems Development)
 Computer Systems Specialist
 (Systems Programmer)
 Computer Systems Specialist
 (Systems Development)
 Computer Systems Specialist
 (Systems Development)
 Computer Systems Specialist
 (Office Automation)
 Computer Systems Specialist
 Computer Systems Specialist
 Computer Systems Specialist
 Computer Systems Specialist
 Computer Systems Specialist

— Candelario Trujillo, Jr.
 — S. Kalyanaraman
 — Gamalhel T. de Armas, Jr.
 — Christian E. Perez
 — Michel J. de Ruffi de Ponteves
 — A. Gregor Cadness
 — Se Wha Moon
 — Yoo Jin Yoon
 — Chanchai Ungpakorn
 — Michael Hawkins
 — Jens Hintze Holm
 — Hock Lye Ooi
 — Ong Wool Thuan
 — Leo Modesto G. Reyes

XXI. INTERNAL AUDIT OFFICE

Chief

Senior Audit Specialist
Audit Specialist
Audit Specialist
Audit Specialist
Audit Specialist
Audit Specialist
Audit Specialist

— Shamshad Ali Khan
— M. M. Soerakoesoemah
— Felix D. Bilal
— Alfred Bretschneider
— Eddie M. Gunadi
— Rakesh Gupta
— M. K. Haquani
— Toshio Higaki

XXII. POST EVALUATION OFFICE

Chief

Senior Evaluation Specialist
Senior Evaluation Specialist
Senior Evaluation Specialist
Senior Evaluation Specialist
Senior Evaluation Specialist
Senior Evaluation Specialist
Evaluation Specialist
Evaluation Specialist
Evaluation Specialist
Evaluation Specialist
Evaluation Specialist
Evaluation Specialist
Evaluation Specialist

— Ronald S. Skeates
— Mohammad A. Hakym
— Horst W. Kaminsky
— A. Timothy Peterson
— Marayur S. Srinivasan
— Phiphit Suphaphiphat
— George B. Whitlam
— Yves S. Bellekens
— Peter Bodora
— Ervin Ellinger
— Kimihiro Kaku
— V. R. Mehta
— C. Narayanasuwami
— Bistok L. Sitorus

XXIII. OFFICES OF DIRECTORS

Director's Assistant
Director's Assistant
Director's Assistant
Director's Assistant
Director's Assistant
Director's Assistant
Director's Assistant

— Denis Berard
— David Craxton
— Stephen P. Donovan
— Ajit Kumar Jain
— Wim Klufft
— Huhn-Gunn Ro
— Soelistiyo
— Tin Myint Maung

APPENDIX II

Professional Resumes of:

- o Douglas R. Halliday
- o Howard G. Harowitz
- o Bert Zethof
- o Don Moors

DOUGLAS R. HALLIDAY

BACKGROUND

Doug Halliday is a partner in our firm located in our Vancouver office. He is responsible for our Strategic Management Services Practice for western Canada. A business administration graduate from the University of Strathclyde in Scotland, he joined our firm in 1971 after a marketing career with Colgate-Palmolive, General Foods and the Diversey Corporation. He has particular expertise in the application of qualitative and quantitative research to business and marketing strategy development and policy planning.

PROFESSIONAL
ASSIGNMENTS

Consumer Products

As part of their strategic management process, assessed the current status of a Canadian television station and also reviewed the threats and opportunities which it might face. A complete competitive review was also conducted. Based on this work we developed the likely prospects for the company.

Developed effective marketing strategies for a Canadian brewing company to reverse share declines in domestic markets. Also developed successful strategies for entry into the U.S. market.

Conducted a feasibility study into the expansion of a poultry and meat processing plant.

Assessed the feasibility of our clients entering the Canadian market for a specialized line of "do-it-yourself" products. Developed strategies for market entry, and planned in detail the product launch and subsequent marketing activities.

Assisted a chain of retail home improvement centres in developing marketing strategies for growth.

Evaluated the market for pre-fabricated cottages and houses. After reviewing the various strategies used in the market assisted an insurance adjuster in negotiating the size of payments made to one manufacturer whose business was interrupted following a fire.

Douglas R. Halliday

Consumer Products
(Cont'd.)

Made an in-depth examination of the buying and promotion practices of multi-market retailers on behalf of a major media organization. Examined the size, nature, trend and dynamics of the markets involved in detail. Strategic and organizational recommendations regarding exploitation of significant opportunities were implemented.

Conducted a study of the effects of government policy regarding substitution of generic for brand-name products on retailers' dispensing behaviour. ~~The results were integrated into marketing and sales strategies.~~

With a view to future acquisitions, evaluated the Canadian market for wine, taking into consideration demographic trends, changes in beverage consumption patterns, and promotion and distribution practices. The strengths and weaknesses of market competitors were then assessed, including their financial standing and production capacities. Presented recommendations for acquisition.

After evaluating the North American market for ammunition reloading equipment, assisted in the development of marketing and distribution plans and strategies for a manufacturer of specialized sporting goods.

Conducted a study of the potential market for "long-life" milk and other associated products. Recommendations were made regarding market entry after evaluating product acceptability, revenue potential, cannibalization of existing markets, competitive strategies, capital investment requirements, marketing costs and organizational requirements.

Examined the potential for profit improvement through improved marketing for a Canadian manufacturer of personal expression products. A complete evaluation of the characteristics and dynamics of the market, and of competitive activities resulted in the development of completely revised marketing strategies and plans, and marketing control systems which will yield higher revenues and profits.

Developed plans and strategies to increase market penetration of garden sheds, based on an evaluation of the Canadian market.

Douglas R. Halliday

Consumer Products
(Cont'd)

Determined the opportunities for increasing market penetration and profitability for a greeting card manufacturer, and detailed specific alternative strategies for taking advantage of those opportunities.

Conducted a study on ways of improving the market image of a large inter-urban bus company, and identified opportunities for the company to obtain a larger share of the transit market. *

Evaluated the relative costs of servicing major accounts for a multi-national personal products manufacturer.

Assessed the effectiveness of the Canadian sales force of a multi-national toiletries manufacturer. Recommended changes in structure, organization and performance measurement.

Provided marketing assistance as well for the following products: frozen dinners, frozen desserts, canned fruits, electronic components, privately-minted medallions, calculators.

Directed an assessment of a fast food chain as an acquisition prospect.

Examined the North American and European markets for recreational vehicles and assess the prospects of a U.S. manufacturer. Advised on new products to reduce chassis inventories and provide a changed business direction.

Assessed the prospects of three business units of a fish processing company. They processed lobster, shrimp and other fish based products.

Tourism & Leisure
Industries

For the Government of Jordan directed a feasibility study for a multi-use resort complex to be located on the Gulf of Aqaba. Marketing studies encompassed over ~~twenty countries~~. Operations reviews covered ~~resorts and casinos~~ around the world, while financial reviews focussed on Europe and the Middle East. The level of effort involved over four man years.

Assisted in the development of business strategies for a new venture involving fitness and recreation programs in the workplace.

Douglas R. Halliday

Tourism (Cont'd)

Advisor on the marketing strategies to the team managing a Canadian ski-resort.

Responsible for a major study to determine the socio-economic impact of acid rain on tourism and recreation in the province of Ontario.

Evaluated the economic impact of tourism on a tourism region in Ontario.

Established the attitudes of seasonal and permanent residents toward development of a national park.

Advised a consulting team developing tourism strategies for Tanzania on international safari markets and distribution. ✓

Developed strategies to optimize revenues for the Canadian Football League. This involved evaluating the strategic options for the league as a whole and for each member as well as assessing the suitability of methods used in other major league sports and U.S. college sports.

Assessed the market for various classes of canoe and developed marketing strategies.

Evaluated the prospects of a Canadian manufacturer of pleasure cruisers. As part of the study evaluated the cruising habits of the various geographic regions of North America and evaluated their effect on craft design and the construction materials.

Studied the harness racing industry in Canada to evaluate the performance of the Canadian Trotting Association in satisfying its needs for service. Subsequently acted as Chairman of an industry wide Fee Structuring Committee.

Industrial and
Economic Development

Designed a new opportunity development system for a provincial government. ✓✓

After considerable study, recommended an industrial development strategy for the Labrador City/Wabush to the Government of Newfoundland and Labrador. ✓

Advisor to the consulting teams preparing economic development strategies for the Region of Hamilton-Wentworth and the City of Guelph.

Douglas R. Halliday

Industrial and
Economic Development
(Cont'd)

Advisor to a consulting team acting as industrial commissioners for the City of Industry, Los Angeles. ✓

Advisor to the Industrial Development Committee, Board of Trade, Washington, D.C. on marketing strategies. ✓

Advisor to the consulting team studying the demand and supply of specialized manpower to staff proposed liquid natural gas tankers serving the Beaufort Sea.

Directed a study of the projected demand and supply of manpower in fourteen construction trades during the building of the proposed Mackenzie Valley gas pipeline. Projections were developed for a seven year period. Recommendations were made on programs to attract employees, reduce turnover, and effect cooperation from the Federal Government and unions. Overall recruiting strategies were developed also.

Public Policy

To provide a factual basis for consideration by the Ontario Ministry of Industry and Tourism of the future development of the Lake Ontario/St. Lawrence River shoreline from Trenton to Cornwall as a major tourist area, we directed a survey of the attitudes of permanent and seasonal residents to the expansion of the St. Lawrence Islands National Park, as proposed by the Federal Government. The survey involved telephone interviews with 350 permanent and 150 seasonal residents of the area near the Park, with a random sample of male and female household heads in each geographical subsection of the study area. For this sensitive issue, the questionnaire was carefully structured to encourage unbiased replies from residents, and interviewers were carefully screened to ensure impartiality. The survey was also used to acquire data on the residents which was then used in an economic analysis of the present effect of the existing national park on the economy of the region. These studies then formed the basis for Provincial Government decisions on the future of the region as a tourist area.

Douglas R. Halliday

Public Policy
(Cont'd)

As part of the tendering process on behalf of the government of Ontario, Computer Services Division, for computer hardware, software, and services, conducted a study of customer satisfaction with each of the tendering companies. All tendering companies were interviewed, as were their customers who used relevant equipment. The results were a contributing factor in the final decision. ✓

For the Federal Department of Industry, Trade and Commerce and the Construction Industry Development Council, conducted a study to determine the need for management education in the construction industry, the current level of management education available to the industry, and the appropriate organization, cost and funding of an industry education institute. In this study, emphasis was placed on the construction industry's need to improve productivity through a systematic development of managerial and technical skills.

For the Government of Ontario, Ministry of Colleges and Universities, conducted a study of the factors affecting employment of graduates in social service work from Colleges of Applied Arts and Technology. The study included an examination of the needs of potential employers, and the degree to which graduates satisfy these needs. Major recommendations of the study were accepted and implemented.

For the Ontario Ministry of Government Services assessed client perceptions of its performance and service delivery and developed marketing strategies for improving the reality and perception of service delivery.

For the same Ministry developed strategic priorities for a large division.

For the Ontario Ministry of Natural Resources directed a major feasibility study to determine whether fish culture could be turned over to the private sector.

Advisor to the consultants studying the cost benefit relationships of apprenticeship training for the Government of Ontario.

Douglas R. Halliday

Industrial Products

Examined the role and management effectiveness of the Council of Forest Industries of British Columbia in its promotion and market development activities at the request of the executive committee. The assignment focused on export marketing in Europe and Japan. Recommendations were presented which defined the role, emphasized a planned, more effective approach to market development, and allowed better control of objectives setting and measurement. ✓

Directed a study to assess the feasibility of forming a consortium to market and execute construction projects outside North America. A worldwide review of construction marketing, discussions with existing foreign based consortia and an examination of the legal, financial and organizational issues formed the focus of the study. In particular comparisons of Canadian financing, insurance and credit programs with those of competitive nations was important. Recommendations are now being implemented. ✓

Investigated the market for partly manufactured hardwood blanks for use in the production of baseball bats, tool handles and paint brush handles.

For a cash rich Canadian mining company developed strategic options for entering a new segment of the mining industry. In addition studied eighteen mineral markets leading to a more detailed acquisition and development plan. ✓

Studied the Canadian and U.S. markets for plastic laminated plywood and regular plywood products. Advised on distribution systems and contracting for sales.

Developed a strategy for managing six, high technology subsidiaries for a multi-national mining company.

Advised a U.S. based mining company on organizational arrangements for developing and analyzing small properties.

Assisted a multi-national oil and gas company in assessing a mining property with a view to changing the financial and ownership structure of the operating company in which our client was a majority shareholder.

Douglas R. Halliday

Industrial Products
(Cont'd)

Evaluated the North American market for large mechanical drive ore carriers, as part of an acquisition review.

Evaluated the North American market for drilling equipment capable of completing holes 25 feet in diameter. Subsequently evaluated the financial feasibility of purchasing the equipment and contracting for service at competitive rates and "normal" utilization.

Evaluated the North American market for rock breaking equipment and developed market entry strategies for a European manufacturer.

At the request of a Canadian holding company, conducted a study of customer attitudes towards two furnace manufacturers, in order to identify product compatibility, and the possible advantages of stronger product identification after a proposed acquisition.

Conducted a study for a hydronic heating products' manufacturer to determine the feasibility of introducing new product lines, either by internal development or by acquisition. The study required a detailed analysis of trends in the commercial, institutional and industrial sectors of the construction industry, and long-range forecasts of construction activity in these sectors.

Assisted a major Canadian chemical company with its organization for export marketing and specific export strategies.

Assisted also in marketing the following products: materials handling equipment, ship construction and repair, wear resistant castings, grey and ductile iron castings, windows, doors, and entrance systems, plastic products, snow removal equipment.

Reviewed in depth the organization and marketing performance of an industrial tool manufacturer. Plans were formulated to place a greater emphasis on a co-ordinated marketing approach, with improved communications with the end-users and the distribution network.

Made an appraisal of factors affecting distribution and purchase for a manufacturer of electronic

Douglas R. Halliday

Industrial Products
(Cont'd)

equipment in order to improve distribution in Canada.

Developed a program for a major construction company for systematic planning of long-range marketing activities, based on forecasts of volume in seven segments of the construction industry in selected areas of Canada. The program included an evaluation of the managerial and technical resources required to implement an efficient marketing plan.

Following the destruction by fire of a plastics' manufacturing facility, a complete investigation was carried out of the company's probable ability to realize the profit levels stated in their business interruption claim. Savings to the insurance companies involved warranted the investigation.

Evaluated the North American market for steel buildings.

Directed a feasibility study for a major expansion of a tubular steel plant.

Evaluated the business prospects of a company which designed and built "system" type new town sites for developing countries and major resource developments.

Evaluated the feasibility of establishing a prefabricated wooden building plant in Frobisher Bay to serve the Eastern Arctic.

Assessed the prospects of a company manufacturing foam insulated building blocks for residential construction.

Advised a multi-national on steps to form a trading house.

Directed a study of Eastern Canadian shipbuilding and repair markets and developed appropriate business strategies.

Commercial and
Institutional
Products

Evaluated one of the world's largest photocopier and electronic office products companies as an acquisition prospect for a Canadian corporation. Focus was placed on the company's marketing and distribution system.

Douglas R. Halliday

Commercial and
Institutional
Products (Cont'd)

Conducted a study of selected computer-based market segments and estimated the effects of technological change on future growth. The study was conducted to provide a basis for the acquisitions policy of a major computer utility company.

Isolated and evaluated market opportunities for a major Canadian financial institution. Assisted in the implementation of each opportunity identified.

Evaluated the Canadian market for remote batch and R.J.E. computer services with a view to developing plans for market entry.

Investigated the market attractiveness of new methods of trading in gold bullion.

Assisted an interior design and furniture company in developing strategies for sales increases.

Directed the development of corporate strategies for a multi-divisional packaging company.

After evaluating client needs, competitive activities, and trends in the United States market, a new approach to marketing was developed for a professional firm.

Marketing assistance has been provided for a number of other products including: photocopying equipment, microfilm equipment, hospital supplies, computer services.

Advised a major Canadian Trust Company on marketing methods and proposal preparation for large client shareholder accounting and custodial services.

Developed strategies for a Canadian bank to increase its penetration of construction and real estate development markets.

Advised the consulting team on developing marketing strategies for a Canadian bank in its treasury services area.

For a Canadian bank evaluated the market for computer based accounting services and developed appropriate business strategies.

Douglas R. Halliday

Commercial and
Institutional
Products (Cont'd)

Assisted a major manufacturer of biological products in developing its world wide business strategy. Subsequently designed and installed a new product development system and helped to identify acquisitions and market entry strategies.

Developed strategies for a multi-national toiletries manufacturer to enter the contract manufacturing business.

ARTICLES PUBLISHED

Marketing in 1976 - Canadian Datasystems, January 1976.

Marketing under the Anti-inflation Guidelines - Marketing, May 3, 1976.

Business Interruption Claims - Canadian Underwriter, June 1976.

Gaining Commercial Accounts - Selling Travel, September, 1976.

Marketing Under Short Supply Conditions - B.C. Business, October, 1975.

Evaluating Offshore Resort Developments, Canadian Consulting Engineer - October 1981.

Marketing Strategies for Recessionary Times, Marketing Magazine, May 1981.

SEMINARS

Marketing Strategies for Retail Merchandizing - Retail Council of Canada, Annual Seminar May, 1975.
Production Strategies for the Marketplace - an evaluation of the production/marketing interface - sponsored by the Government of New Brunswick, May, 1977.

Succeeding in the 80's - The Resource Industries Institute of Management Consultants Annual Management Seminar - March 1981.

Introduction to Strategic Management October and December 1981.

Product Market Strategies, Financial Post Seminar on Strategic Management November 1981, January 1982.

PROFESSIONAL
AFFILIATIONS

Member, Institute of Management Consultants of British Columbia.

Past Committee Member, Professional Marketing Research Society - Education Committee, Long Range Planning Committee.

Past Chairman, Education Task Force - American Marketing Association, Toronto Chapter.

Douglas R. Halliday

PRIOR EXPERIENCE

General Foods Ltd., Marketing Research Associate, controlled marketing research activities for a group of major brands and the new product development area. Areas of responsibility included technical aspects and the interpretation of marketing research designed to gather intelligence for marketing planning including strategy information, product changes and cost reductions, product positioning, advertising strategies and copy tonality, and corporate activities relating to social change.

Diversey (Canada) Ltd., responsible for directing projects in new product introduction, sales, sales management, sales incentive schemes, market and marketing research, new business studies and packaging development.

Colgate-Palmolive Ltd., Toronto, Project Manager, marketing research services.

HOWARD HAROWITZ

BACKGROUND

Howard Harowitz is a principal in the strategic management group, resident in our Vancouver office. He has a Master of Business Administration degree from Stanford University (California) and an honours B.A. degree in economics from the University of British Columbia. His prior experience includes a position as Manager, Western Canada for an economics planning/consulting firm, where he directed consulting engagements across a broad base of industries.

Over the past seven years, Mr. Harowitz has gained extensive experience in the design, development, and implementation of computer-based decision support systems. He has worked with clients on a wide range of DSS applications, including financial planning, merger/acquisitions analysis, econometric forecasting, portfolio analysis, and market segmentation models. The vast majority of assignments which are profiled in this document included the development and use of computer models.

PROFESSIONAL EXPERIENCE

Government Policy Strategy Formulation

For the Alberta Department of Economic Development, identified the ways in which government could act to foster increased expansion and diversification in the food processing sector of the economy. The study examined the current structure and future prospects for the industry. Based on the research findings, a detailed set of program and policy recommendations were developed to ensure that the province's industry support package would meet industry's needs and also remain competitive with other regions' offerings.

For the B.C. Government Ministry of Industry and Small Business Development, conducted an in-depth study to identify the key factors which affect corporate decisions on where to locate their industrial facilities. As well as identifying the key factors and quantifying the magnitude of their impact, the study analyzed the regional competitiveness of each of the four Regional Districts of the Lower Mainland for six manufacturing and five non-manufacturing industry sectors and developed long-term forecasts for growth in each sector.

Howard Harowitz

Governmental Policy
Strategy Formulation
(cont'd)

For a Western Canadian provincial government, directed a study which examined the long term market potential for Canadian natural gas exports. The study developed base demand and supply forecasts by region, by consumer sector, by fuel type over twenty years. Based on this analysis, the potential for incremental Canadian gas exports was examined under a number of different combinations of regulatory environments and price scenarios.

For Kelowna, British Columbia, developed a long-term financial planning model to aid city council in choosing between alternative long-range development plans. The model analyzes future city requirements for all services based on an explicit set of assumptions reflecting any potential future development path. Alternative plans can be cross-compared to isolate those with the lowest expected costs to existing and future taxpayers.

For Alberta Economic Development, directed a study to identify opportunities for expansion and diversification of the Alberta-based vegetable processing industry. The study also provided recommendations on specific steps the government could take to maximize the potential for industry to realize the identified growth opportunities.

For a municipality in Northern B.C., provided support in their fiscal planning and budgeting process. The work involved reviewing the budget in detail, and comparing with the budgets of similar municipalities throughout the Province. In addition, we developed a fiscal impact modelling system for assessing the impacts of various budget alternatives, looking at both targetted service levels by department, and also alternative tax policies.

For Petro Canada, examined the national and regional economic impacts of the Arctic Pilot Project, focusing on alternative site location for the east coast terminal, and on Canadian versus foreign sourcing of major capital items.

For an Alberta crown corporation, performed an in-depth audit of the effectiveness of their strategic planning process. The study resulted in a detailed set of recommendations to increase senior management's commitment to the process and the decisions coming out of it.

Howard Harowitz

Governmental Policy
Strategy Formulation
(cont'd)

For two different municipalities in North-central British Columbia, analyzed their initial work in developing a fiscal impact modelling framework. Our analysis identified a number of shortcomings in the existing process, and identified specific remedies for these.

For The British Columbia Government government, conducted an in-depth analysis of alternative options for providing Special Enterprise Zones as a means of stimulating new investment in the province. The study involved detailed analysis of the taxation systems and other incentive options available to government, and the assessment of the impacts of providing various combinations of tax relief and incentives on corporate profitability. Through in-depth interviews with a number of companies ~~currently operating outside of the province, we developed a number of representative test cases for analysis, developed detailed computer models, and~~ tested these representative cases under a number of different configurations of incentive packages that could be offered. The analysis focussed on identifying the costs of different packages to government, and the expected benefits to companies of locating in these zones.

Market Research and
Planning

For a major Canadian bank, prepared a long-term analysis of potential growth for 23 asset categories in each of the U.S. Federal Reserve Districts. The study examined market trends and competitive pressures from domestic banks and other foreign banks.

For a Western Canadian manufacturer of oil field equipment, analyzed their current market with a view to increasing their sales penetration. A plan was developed and implemented to increase the effectiveness of their marketing efforts and to establish the firm as the dominant manufacturer and supplier in this industry.

~~For a Canada-wide industry association, directed the development of an ongoing industry analysis and forecasting system. Regular analysis was provided to senior management of association members on regional forecasts of sales growth by product, industry profitability, and the key competitive risks and opportunities over the coming three years.~~

Howard Harowitz

Market Research and
Planning (cont/d)

For a major manufacturer of building products, developed forecasts for construction activity by region, by type of building. Conducted extensive sensitivity analyses on product usage rates, then prepared distributions for future sales by product line.

For a major shipping company, analyzed the long-term trends for commodity shipping from Canada to Europe, by major commodity group. ~~The analysis focused on growth prospects for eight European countries, their projected requirements for imported resources, and Canada's international competitive position.~~

For a large western conglomerate, prepared a long-term analysis of economic prospects in their major international markets.

For numerous manufacturing firms, designed and implemented forecasting models to project future sales by product line.

Strategic and
Financial Planning

For a major company in the oil and gas service industry, analyzed their current competitive position and designed a program to help them penetrate the U.S. market. The study looked at locational issues for branch operations, managerial resources to successfully implement the new initiative without compromising the effectiveness of management in running the domestic business.

For a start-up high technology firm, reviewed their business plan in detail, identifying weaknesses in the plan and options for remedying them. Also, developed detailed financial forecasts and a modelling framework to assist in ongoing planning work.

For a group of ~~eight mining companies in Canada, conducted an international comparison of cost competitiveness for the major western producers of the commodity.~~ The study research had taxation, representative capital and operating costs, and transportation costs for each country. Based on this research, a set of financial models were developed and used to determine Canada's competitive position under various future economic scenarios.

Howard Harowitz

Strategic and
Financial Planning
(Cont'd)

For a mining company in British Columbia, analyzed their property taxes in light of current and projected municipal budgets in their region. Working with the client and with municipal officials, was able to reduce the company's property taxes by approximately \$600,000 in the first year.

For a large chemical company, analyzed long-term capital requirements by business unit. Also consolidated the analysis to examine tax implications, total corporate cashflow, and financing alternatives.

For a group of large corporate investors, examined the financial prospects for a Major League baseball club in Vancouver as a result of potential league expansion in the eighties. The study analyzed the impacts of various player acquisition strategies and a range of potential attendance scenarios.

For one of Canada's largest industrial companies, was involved in a number of socio-economic impact assessment studies, analyzing a proposed major investment in British Columbia. Involved in a number of different aspects of these studies, and provided a lead role in assessment of fiscal impacts of the project at the federal, provincial, and local government levels. As part of the research, developed fiscal impact assessment models for surrounding communities to the proposed site, using the results both for the impact assessment reports and also to provided the client with needed information in negotiating an appropriate property tax agreement with these municipalities.

For a major energy company, developed a project evaluation system which examined total costs and cashflow of a greenfield coal mine, focusing on alternative design options and project timing.

For a major heavy manufacturing firm, provided an analysis of the expected fiscal impacts of a proposed "mega-project" in western Canada on the various levels of government. The work focussed primarily on municipal fiscal impacts, involving detailed estimates of all major revenues and costs, and translating budget results into potential property tax impacts. A second aspect of the study developed estimates of the project's impact on the key revenue categories at the federal and provincial government levels.

Howard Harowitz

Strategic and
Financial Planning
(cont/d)

For a wide variety of manufacturers, developed financial modelling systems to forecast business unit performance and consolidated operating results.

For an investment firm, developed a set of industry models to forecast future financial performance for companies on a stand-alone basis and on a merged basis.

Acquisitions and
Divestments

For a mid-sized machinery manufacturer, identified and evaluated key industry sectors and specific companies for their acquisition program.

For a multinational natural resources company, conducted a divestment study for a major mining property. The study included maximization of property value, identification of potential buyers, development of documentation for divestment, and determination of tactics and procedures.

For a number of companies, put in place a data-intensive screening process to identify and evaluate potential acquisitions.

Inflation Management

For a major white goods manufacturer, established a process for examining inflation trade-offs on alternative materials specification for home appliances.

For a major energy company, examined the inflation impacts on total costs and cashflow of a greenfield coal mine, focusing on alternative design options and project timing.

For an oil and gas exploration company, analyzed the impacts of inflation on their long-range drilling program.

For a major chemical company, developed a cost monitoring system and short-term forecasting system for a joint-venture chemical plant under construction.

Management
Information and
Reporting

For a major bank, directed the design and installation of a country monitoring and credit risk evaluation system for over fifty LDC's in their international lending portfolio.

For a construction equipment manufacturer, designed a field inventory and sales reporting system for the entire dealer network.

Howard Harowitz

Management Information
and Reporting (cont'd)

For a manufacturer of commercial and residential building products, worked on conceptual design and implementation of a data base on installations of their own and all competitors' products.

For a Canada-wide industry association, worked with client personnel to identify industry consensus on forecasting requirements, and directed the development of a large computerized data base and forecasting system.

EDUCATION,
PROFESSIONAL
AFFILIATION

Education

B.A. (Honours) Economics, University of British Columbia.

MBA, Stanford University. LeSeur Fellow.

Professional
Affiliation

Institute of Management Consultants of B.C. (C.M.C.)

The Planning Forum (NASCP)

Business Week Executive Program "Strategic Financial Planning and Analysis"

Seminars/Publications

Business Week Executive Program "Matching Strategic Objectives with Acquisition Opportunities"

Petroleum Services Association of Canada "Strategy for Survival"

Civic Public Works - "Kelowna Finds Computer Model Aids Community Planning", August, 1984

The Journal of Business Strategy - "The New Alchemy": Divestment for Profit", Fall, 1984

OTHER EXPERIENCE

Manager, Western
Canada

For Data Resources of Canada, was in charge of all facets of the Western Canadian consulting practice, including project design and management, and business development.

Howard Harowitz

Special Projects
Coordinator

Workers' Compensation Board of B.C. Involved in major reorganization of Claims Processing Department, involving computerization and the opening of fourteen regional offices.

BERT ZETHOF

BACKGROUND

Bert Zethof is a consultant in the strategic management group, resident in our Vancouver office. He has a Master of Business Administration degree from the University of British Columbia and a Bachelor of Arts degree in Economics from the University of Victoria. His major areas of expertise include marketing, strategic and economic development planning, financial and economic analysis, and general feasibility studies.

His prior experience includes a position as Manager of Corporate Planning for a major engineering and construction company, and a position with the Government of British Columbia where he implemented a financial assistance program. The professional experience given below includes his experience in consulting assignments, as well as experience gained while working for private and public sector organizations.

PROFESSIONAL EXPERIENCE

Government Policy

For a Provincial Ministry of Municipal Affairs, evaluated its existing municipal financial information system. The purpose of the evaluation was to identify and assess various options for enhancing the information system's utility as a planning tool. The work involved interviews with selected municipal administrators throughout the province.

For a Canadian territorial government, analyzed a proposal put forward by a private sector company to re-open a dormant mine. The two key objectives of the analysis were to determine if the proponent's business plan was realistic and to determine if the proposed government assistance package seemed appropriate in the light of potential benefits.

For the marketing arm of a group of breweries, gave advice on effective government relations and provided assistance in the preparation of a brief to a provincial government. The purpose of the brief was to improve communications between the brewing industry and the government and propose ways of stimulating economic development through more co-operation.

Bert Zethof

Government Policy
(cont'd)

For a western provincial government, estimated the likely impact on the province of a proposed 20 percent surcharge on exports to the United States. The study involved an analysis of the impact on 12 major export commodities, including forest products, hydrocarbons and their derivatives, and some categories of manufactured products. Key industry and government representatives were interviewed to determine current market conditions and the likely response of each industry in the event that the proposed surcharge ever became reality. The study provided estimates of the likely change in export revenues for each commodity, with detail back-up on whether the change would be due to a price change, volume change, or a combination of price and volume changes.

For a western provincial government, conducted an in-depth analysis of alternative options for providing Special Enterprise Zones as a means of stimulating new investment in the province. The study involved detailed analysis of the taxation systems and other incentive options available to government, and the assessment of the impacts of providing various combinations of tax relief and incentives on corporate profitability. Through in-depth interviews with a number of companies currently operating outside of the province, we developed a number of representative test cases for analysis, developed detailed computer models, and tested these representative cases under a number of different configurations of incentive packages that could be offered. The analysis focussed on identifying the costs of different packages to government, and the expected benefits to companies of locating in these zones.

For a municipality in Northern B.C., provided support in their fiscal planning and budgeting process. The work involved reviewing the budget in detail, and comparing it with the budgets of similar municipalities throughout the Province. After experiencing several years of rapid growth, the community's level of economic activity had stabilized and the planning support aided the municipality in arriving at an optimal allocation of limited resources in this new environment.

For the Government of Canada, engaged in a study for developing energy conservation programs aimed at residential consumers of energy. The study estimated the price elasticity of demand for various fuels in Canada and evaluated energy conservation programs in Oregon. The program evaluations determined the relative effectiveness of using incentives (e.g. grants)

Bert Zethof

Government Policy
(cont'd)

and disincentives (e.g. taxes) to encourage energy conservation at the residential level in Oregon.

For the City of Kamloops, British Columbia, formulated an economic development strategy which included the determination of economic sectors with potential for growth, the establishment of economic development targets for various sectors of its economy, and the preparation of a detailed action plan. For the manufacturing sector, opportunities and constraints were identified for the further processing of the area's primary resource products, the replacement of products imported into the region, and attracting "footloose" industries. An important element of the project was the close cooperation with the city's economic development and planning staff, as well as with an economic advisory committee consisting of community representatives.

For a regional district in British Columbia, prepared a regional and eleven community economic profiles. The purpose of the profiles was to promote industrial development by providing information that would assist decision-makers in choosing the region as a suitable location for industrial plants, distribution centres, branch offices or other types of facilities. The profiles described all aspects of the local economy, including the labour force, major employers, transportation and utility services, and community amenities.

For the Thompson-Nicola Regional District in British Columbia, conducted a study to identify economic development opportunities for creating employment and diversifying the region's economy. The study encompassed a review of the agriculture, forestry, mining, manufacturing, trade, tourism, and other service sectors. Opportunities which had market potential and made sense for the region were identified, focusing in particular on the further manufacturing of the region's primary resources.

For a regional district in British Columbia, was a member of a team that was formed to establish a corporation under the Federal Government's Local Employment Assistance Development (LEAD) program. The team's tasks included establishing a Board of Directors, obtaining government funding for the corporation and developing policies and procedures for its operation. Mr. Zethof's role was to formulate an action plan for achieving the corporation's

Bert Zethof

Government Policy
(cont'd)

objective of creating employment opportunities in the small business sector.

For the B.C. Ministry of Industry and Small Business Development, participated in the implementation of the Canada/British Columbia Industrial Development Subsidiary Agreement (ISDA). The objective of the Agreement was to diversify British Columbia's industrial base by providing financial assistance to manufacturing and processing businesses with relatively high value-added. Responsibilities included implementing a public information program using newspaper advertising and personal contact to create awareness about the program and to communicate the eligibility criteria; analyzing applications for financial assistance; and making recommendations to the managing committee about which applicants should receive financial support.

For the Government of British Columbia, compiled municipal financial data for publication in the British Columbia Regional Index, and evaluated business volume and trends of British Columbia's financial institutions for publication in British Columbia Facts and Statistics. The purpose of the publications was to promote economic development in the province.

For the B.C. Ministry of the Environment, participated in a project to develop a system for predicting floods and water supply levels throughout the province. The system was based on the regular measurement of the volume of snow at selected locations. The project team used the volume of snow, together with other variables like rainfall and temperatures, to develop a regression model for forecasting stream flow in the Province's major river systems. Threshold levels for issuing flood warnings were then determined. Mr. Zethof was also responsible for field maintenance of the snow measuring stations.

Business Strategy and
Marketing

For an oil drilling contractor, conducted an assessment of the market for shallow drilling in Western Canada. The work program involved personal interviews with 20 selected operators. The primary objectives of the study were to determine future drilling plans, how drilling contractors are selected, the operators' perceptions of the client, and any improved services that our client could offer the marketplace.

Bert Zethof

Business Strategy and
Marketing
(cont'd)

For the Canadian subsidiary of a major international engineering and construction company, undertook the following strategic planning and marketing activities:

- o Coordinated and managed the company's strategic planning cycle which called for annual revisions to the company's ten-year plan. The planning process included an assessment of the external environment and the company's resources, identification of opportunities and threats, establishment of goals and objectives, development of strategies for achieving the objectives, a forecast of sales volume and financial performance, and determination of the resources required to implement the strategies.
- o Assisted senior officers in reorganizing the Canadian subsidiary from functional departments to five market-oriented divisions that resulted in more effective marketing and customer service, entrepreneurship, employee motivation, and efficiency.
- o Computerized important strategic planning functions, including market and financial forecasting and the assessment of alternate scenarios for strategic plans. Computerization involved hardware and software selection and the development of financial models.
- o Prepared an inventory of technology which could be transferred from the international parent company to the Canadian subsidiary. The purpose of the inventory was to determine capabilities, knowledge, patents, and skills which could be transferred to the Canadian subsidiary and then enhanced to generate new market opportunities for the company and industrial benefits for Canada.
- o Developed the corporation's Canadian procurement policies after consulting with major clients in the energy sector, including Petro-Canada, Shell Canada Resources, Imperial Oil Esso, NOVA, Gulf Canada Resources, Suncor Inc., Dome Petroleum Ltd., and various federal and provincial government agencies like CIDA, the Export Development Corporation, and the Department of Regional Industrial Expansion.
- o Identified target market segments for the company's services and developed marketing programs for penetrating these segments. Important elements of the

Bert Zethof

Business Strategy and
Marketing
(cont'd)

programs were an identification of prospective clients and their purchasing decision-makers, the development of brochures describing the company's services and their benefits, and presentations and proposals to prospective clients. The proposals were designed to address the construction needs of clients in the energy, mining, commercial and institutional sectors. The value of services proposed ranged from \$1 million to \$100 million.

- o Developed a marketing communications plan to increase awareness of the company's capabilities among potential Canadian clients. The plan recommended the use of frequent sales contacts, direct mail campaigns, appointment notices in major Canadian newspapers, and advertising in trade publications.

For a manufacturer of light rail urban transit vehicles, prepared a strategy for marketing the company's expertise in transportation services. This expertise had been developed to support the company's hardware sales and includes training, operations and maintenance systems, technical documentation, testing and commissioning, and after-sales support. A key element of the assignment was to screen a broad range of opportunities based on the company's capabilities and market attractiveness, in order to identify and prioritize the most appropriate opportunities for the company to pursue. The company integrated the recommended strategy for the services sector with its overall business plan.

For a major furniture manufacturer in Canada, assisted management in undertaking a strategic review of the company. The assistance involved conducting interviews with furniture dealers in Western Canada to determine sales trends, consumer needs, competitor strategies, key issues for dealers, and industry perceptions of the client. The results were used by the client to develop a strategy for improving business performance.

For Zellers Limited, implemented a retail merchandising program encompassing the creation of promotional displays, inventory control, shelf management and customer sales and service.

For investors proposing a uni-level marketing concept for books, prepared a business plan and a Technical Report which is a requirement for obtaining a Vancouver Stock Exchange listing. The assignment called for a

Bert Zethof

Business Strategy and
Marketing
(cont'd)

detailed assessment of the U.S. market for fiction books, a fine-tuning of the proposed marketing strategy, and the development of a strategy for processing large volume book orders. A computerized financial model was developed in order to assess the venture's feasibility and key risk factors were identified.

Prepared a business plan to provide direction to the company in a price-competitive market. Among the factors assessed were the characteristics of the company's current carpet inventory, the company's sales force and service features, the competitive environment, and the owners' objectives. Several alternate scenarios were investigated using a computerized model. Among the variables tested were sales discounts, product mix, product costs, and promotion expenditures.

Production and
Operations

For a \$100 million island building project for a major oil and gas company at Norman Wells, Northwest Territories, managed a program to ensure the maximum use of Canadian (particularly northern Canadian) suppliers, subcontractors, materials and labour. Responsibilities included the development and implementation of policies, control procedures and a public information program to ensure that all Canadian and local suppliers were given a fair opportunity to participate in the project. As a result of this effort, Canadian and local content targets were achieved.

OTHER EXPERIENCE

Don Ference &
Associates Limited

Held position of Consultant for this general management consulting firm based in Vancouver, British Columbia. Major assignments included developing an economic development strategy for a city and community economic profiles for promoting economic development in a regional district in British Columbia.

Northern Construction
Company Ltd.

The Canadian subsidiary of Morrison-Knudsen Company Inc., a major international engineering and construction company based in the United States. Northern Construction Company has expertise in primary resource development, heavy civil, mechanical and building construction, and has a permanent staff of around 100 people. As Manager of Corporate Planning, was responsible for strategic planning, market research, marketing and business development.

Bert Zethof

B.C. Ministry of
Industry and Small
Business Development

Participated in the implementation of the Canada/
British Columbia Industrial Development Subsidiary
Agreement (IDSA). Major responsibilities were the
public information program and analysis of applica-
tions for financial assistance.

B.C. Ministry of the
Environment

Working in the Hydrology Division, participated in a
project to develop a system for predicting floods and
water supply levels throughout the Province.

Zellers Ltd.

A major department store chain with outlets across
Canada. Responsibilities included inventory control
and customer sales and service.

EDUCATION

M.B.A., Marketing and Finance, University of British
Columbia

B.A., Economics and English, University of Victoria

PROFESSIONAL
AFFILIATIONS

North American Society for Corporate Planning

American Marketing Association

Sales and Marketing Executives of Vancouver

Institute of Management Consultants of British
Columbia, Prospective Member

DONALD C. MOORS
Manager

BACKGROUND

Don Moors is a manager in our firm specializing in program evaluation. Since 1967 he has been involved in directing the development, analysis and evaluation of programs in both the public and private sectors. He has developed a comprehensive program evaluation model for use in education, occupational training and human/social service organizations. Mr. Moors holds a Bachelor of Arts degree and a Master of Arts degree in Psychology.

**PROFESSIONAL
EXPERIENCE**

Program Evaluation

On behalf of the Canadian International Development Agency - Industrial Cooperation Division, completed an evaluation study of an Asian Regional industrial training and development organization. The study results reported on the impacts of the organization's activities in ten Asian countries as well as the benefits of CIDA's involvement with the organization to Canadian industries. During the engagement extensive interviews occurred with industry officials in selected Asian countries, international development organizations in Asia, Europe and North America, Canadian business entrepreneurs and Canadian External Affairs officials were completed.

For a national bank in the United Kingdom, assisted with the development of an evaluation framework to determine the outcomes of a staff training program. Outlined evaluation indicators, data collection techniques and resulting reporting methods to provide ongoing information on program effectiveness, efficiency and significance.

For a joint federal-provincial forestry development program, evaluated the outcomes of an industry based supervisory training program.

On behalf of a provincial government Department of Fisheries, evaluated the development and implementation of a technological improvement program associated with deep water fish detection.

DONALD C. MOORS
Manager

PROFESSIONAL EXPERIENCE
(Continued)

Program Evaluation
(Continued)

For a federal industrial development program completed the evaluation of program impacts as they relate to industrial and business development at the national, regional and local levels.

For Correctional Service Canada, conducted evaluation assessment studies and program evaluation studies of an industrial manufacturing program, three program components of the Technical Services Branch and an inmate employment and training program. Provided the products required by Treasury Board for the evaluation of Federal Government Programs. Conducted a number of program evaluation studies.

For a jointly operated Federal-Provincial program, independently reported on the policies, activities and outcomes of a province wide (\$6 million) industry based training program. Reviewed the program policies, objectives, procedures, monitoring activities, reporting formats and personnel functions. Outlined revisions associated with program policy and the effectiveness and efficiency of procedures.

For four program components of the National Museums of Canada, conducted evaluation assessment studies. These programs were national in scope.

Conducted a number of workshops in program evaluation techniques for education/training administrators and delivery personnel. These workshops resulted in the development of plans for comprehensive evaluation assessment studies and evaluation studies, i.e., Institutes of Applied Arts and Technology, Regional Vocational Schools, adult upgrading programs, etc.

For a federal government department, completed the evaluation assessment study of a capital construction program component. Developed evaluation issues and evaluation research designs associated with urban planning and development, effectiveness of service outcomes and project efficiency; and assessed the cost effectiveness of the various evaluation designs. The recommended evaluation options were subsequently approved by the Deputy Minister.

DONALD C. MOORS
Manager

PROFESSIONAL EXPERIENCE
(Continued)

Program Evaluation
(Continued)

For a major federal government cultural agency, completed the evaluation study of a national library awareness initiative involving six separate programs. The individual evaluation research projects involved designing and carrying out interviews and questionnaire surveys at a national level. Conclusions and recommendations focused on the strategic management, resource allocation and operational activities of the program. These recommendations were accepted by the agency.

For social service agencies in two provinces, assisted in the evaluation of social development programs for long term unemployed persons. Assessed the agency policies, their interaction with other community and provincial organizations, program planning processes and impact.

Design and Operation
of Training and
Employment Systems

For a provincial adult education agency, designed, and directed the development and implementation of an academic upgrading program to assist the occupational training sequence of adults. This \$3 million program was offered at 15 different provincial locations involving 100 employees and 1,500 clients.

For a private training institution, directed the development of resources for a comprehensive system for training unisex hairstylists. The program was required to meet the standards of a provincial association and a provincial Department of Education.

For a provincial Department of Education, directed the planning installation and operation of a federal-provincial career assistance program. This included the preparation of a grant proposal (\$70,000) allocation and training of staff, identification of organizational interactions, budget control and monitoring of the delivery sequence.

DONALD C. MOORS
Manager

PROFESSIONAL EXPERIENCE

(Continued)

**Policy and
Organizational
Development**

For a provincial Department of Education, with two other persons, provided a comprehensive analysis of the policies, organization and activities of the province's adult education activity. Provided a complete plan for the reorganization of the activity combining three distinct sections into one overall organization. Defined, for the Deputy Minister's approval, a new policy statement, long and short term objectives, an organizational plan and statement of responsibilities.

For a provincial hospital and rehabilitation centre, analyzed the work attendance patterns of the medical, maintenance and rehabilitation staff (300 employees). Reported results to the hospital management board and provided guidelines for the selection and yearly assessment of employees.

For a provincial Department of Education, through a task force activity, analyzed the needs of and resources available for a province-wide adult literacy program. Provided, for the approval of the Deputy Minister, a policy statement associated with the department's involvement in this area. Provided guidelines for planning and implementation of a new program.

For a provincial Department of Tourism, directed the five-year projection of training needs for the hospitality industry at a province wide level. Outlined plans for the implementation of a jointly operated industry based training program to meet these projected needs.

**EDUCATION &
PROFESSIONAL ASSOCIATIONS**

Education

Bachelor of Arts, 1965, Dalhousie University

Master of Arts (Psychology), 1969, Dalhousie University

**Professional
Affiliations**

Member, Association of Psychologists of Nova Scotia

Member, Association of Education and Training Technology

DONALD C. MOORS
 Manager

**EDUCATION & PROFESSIONAL
 ASSOCIATIONS (Continued)**

**Publications,
 Presentations
 and Lectures**

Articles, relating to the evaluation of programs and the development of service systems, in professional journals and publications, such as:

Moors, D.C. "A Model to Evaluate Education and Training Programs" Aspects of Educational Technology, XIII, 1979, 287-296.

Lectures and seminars related to program evaluation and vocational assessment systems, such as:

"The Implementation of a Program Evaluation System" and "Conducting Program Evaluations: Some Considerations" presentations to the Educational Technology International Conference, Sheffield, England (1979) and Aberdeen, Scotland (1981).

Workshops on program evaluation, such as:

"Understanding Program Evaluation" - A series of 10 one-day sessions (one per month) designed to assist industrial training instructors to develop program evaluation skills. Adult Vocational Training Centre - Sydney, Nova Scotia.

"Planning A Program Evaluation Assessment" - A four-day workshop designed to permit administrators and instructors to develop a plan for evaluating their program or institutional activities. The workshop has been delivered to: Medical Laboratory Technology Training personnel in Nova Scotia, the Cape Breton Regional Vocational School administrators, and the Nova Scotia Land Survey Institute.

EMPLOYMENT SUMMARY

**Currie, Coopers
 & Lybrand**

Senior consultant, 1981-1983. Subsequently, appointed Manager. Responsible for developing the program evaluation practice in the federal public sector.

DONALD C. MOORS
Manager

**EDUCATION & PROFESSIONAL
ASSOCIATIONS (Continued)**

**Nova Scotia
Department
of Education**

Supervisor of Program Evaluation, 1974-1981. Responsible for establishing the Department's program evaluation capability including procedures and guidelines and carrying out evaluations of all Departmental programs.

**Mount St. Vincent
University**

Lecturer and Assistant Professor of Psychology, 1967-1974. Responsible for normal instructional requirements and for establishing a Department of Psychology.

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Halliday, D. R

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how Canadian product manufacturers
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