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TAKING THE PULSE OF PPP IN CANADA

Steve Savas, a professor from City University of New York recently wrote a book on public-private partnerships in which he reminds us of something the philosopher Schopenhauer once said:

“ All great ideas go through three stages: In the first stage, they are ridiculed. In the second stage they are strongly opposed. And in the third stage, they are considered self-evident.”

Of the United States, Savas concludes that in regard to partnering between the public and private sectors, they have entered the “self - evident” stage. Of Canada, I would suggest that we are somewhere in that grey field between “strongly opposed” and recognizing their “self-evident” nature.

The concept of public - private partnerships is slow to emerge in Canada as a legitimate instrument to deliver traditionally publicly-delivered services and infrastructure. The reasons for this are somewhat complicated but I think can be attributed to a few factors.

Before that explanation can have meaning, however, one requires a political context:

There are three levels of government in Canada - all very well established and represented - the federal government, ten provincial governments (and in this category we also include a few territories which act somewhat like provincial governments but without their full set of powers) and municipal governments.

The Constitution of Canada recognizes the provincial governments and gives full authority to the provinces to establish and govern municipalities within their geographic boundaries. Therefore, the municipalities are the creatures of provincial legislation and constitutionally are not connected to the federal order of government with the exception of regulatory regimes and general laws of the land.

Federal and provincial governments are party based - so throughout the country in English speaking Canada - the Liberals, Conservatives, Canadian Alliance Party and NDP take turns forming the governing entity at each of these two levels. Quebec is currently represented by the Parti Québécois in Quebec and the Bloc Québécois at the Federal level, both of which are separatist parties.

At the municipal level, there is no formal party system at work in most of Canada. This means that each and every individual running as a councillor, does so outside of the discipline of a party system or independent of a party platform. On a city council such as The City of Toronto, the largest municipality in Canada with a population base of 2.3 million, there are 44 city councillors and 1 mayor. Each of these people was elected without party affiliation even though they may be informally connected with an established party - and in fact, most would be. Once elected, however, coalitions are built generally on an issue by issue basis as opposed to being on party lines.

That is the political framework in which one must examine the factors that have affected the movement of public-private partnerships in Canada. The factors are intrinsically related and would include the following the financial imperative, the political realities and the labour challenge.

The Fiscal Imperative

Fiscal crises have driven a number of governments to institute PPP/PFI programs. In Canada, at the two senior levels of government, fiscal health has been improving relative to previous years and although the word “relative” is important here, many would consider that they are not under the same pressures currently that they were under just five years earlier. How is this possible?

The Government of Canada, under the current administration led by a Liberal government, has managed to achieve a balanced budget in recent years. Certainly some would say that has been achieved by delegating some of their responsibilities to the provinces and also by reducing transfer payments being made to the provincial governments. Debt is another question and we are clearly over - committed in that respect.

Provincial governments, having been the recipients of the downloading from the federal government in turn downloaded additional responsibilities to the municipal governments and as an act of fairness having experienced the same treatment from their federal overseer, reduced transfer payments to the municipalities. All but a couple have balanced their budgets in recent years.

This is a somewhat simplistic overview but certainly captures one of the reasons that the two senior levels of government have not felt the pressure to find alternative ways of doing business on any large scale- the fiscal imperative is simply not there to maintain the level of activity that they have done in the past.

So the end of the food chain, the municipal sector, has been the recipient of all this transferred responsibility and they have no other level to which they, in turn, can offload.

So why are they not embracing PPP given the pressures they must be under?

The Political Reality

Quite simply put, the lack of a party system means the development of a program as a commitment of government is an extremely difficult undertaking municipally. Unlike many of their USA counterparts, with a strong mayor system, in which a Mayor and his appointed officials really carry out the program of the city, in Canadian cities we have a weak mayor system - that is, the mayor is elected as a single individual and has a single vote on council once he/she takes office.

Only personal influence can be brought to bear on votes. Building consensus from within a council to support an innovative program can be time consuming and extremely difficult. This is especially so in those municipalities, especially the larger ones, which have strong union supporters on Council - all feeling that PPP is a threat to union membership.

Again, as a weak mayor system, the mayor normally would inherit the administrative staff that is already in place (city manager, treasurer, etc.) and would only have influence on changes to those positions after being in term for some time. There is no certainty that a pro-P3 mayor would inherit a pro-P3 administration.

This is the political reality of the Canadian system.

Added to this is the factor that I'll call

The Labour Challenge

Canada seems to breed very aggressive and very vocal public labour unions. None of you represented at this meeting today is unaffected by the opposition that you have faced with your unions on this issue. The current mood is intense and emotional and at least with the major unions, there is no receptivity for intellectual discussion on this topic in Canada at this time with their governing bodies. End of story.

Having painted the most pessimistic of pictures for you, I am now going to tell you that given that dynamic, there have been and are surprising optimistic

indicators that PPP will move forward.

These would be very modest forays by comparison to the UK and to Australia's State of Victoria, but in the context, definite signs of a pulse in Canada.

Just a clarification in use of terminology. Our American counterparts often use the term *privatization* to capture the full spectrum of activity from straight contracting out to sale of government assets and full private operation.

In Canada, our usage of the term *privatization* is more commonly used to capture the extreme limit of the spectrum - sales of public assets and their private sector operation. Everything short of that is referred to as public-private partnerships.

Ten years ago, public - private partnerships were not on the radar screen of governments as a concept. There had been a number of publicly run businesses sold off to the private sector - Air Canada and CN Rail to name a couple that were long established publicly held businesses. But the actual concept of partnering with the business community to deliver or develop public services or infrastructure, was just beginning to emerge.

The Past, the Present and the Future

A number of very significant P3's have made their mark in the past decade, not necessarily distinguished for their size but for their potential impact within the sector:

- The Confederation Bridge;
- NAV CANADA;
- Highway 407 ETR - an electronic toll highway north of Toronto
- Moncton Water Treatment Facility; and
- Bruce Nuclear Facility

The Confederation Bridge:

In 1993 the Government of Canada entered into a 35 year agreement with Strait Crossing Development Inc., a consortium of developers, to design, finance, construct and operate a 12.9 km bridge that connects Prince Edward Island to the mainland of Canada. Construction was completed in 1997. At the end of the 35 year period, the bridge will be transferred to the government for \$1. Prior to its construction, the only link between the two was the ferry service which

was highly subsidized. \$660 million (CDN) was raised privately. The Government of Canada pays Strait Crossing \$41.9 million annually in 1992 dollars, adjusted each year to 75% of the Consumer Price Index for 35 years. This is the same amount the government had been subsidizing the ferry service.

This was the first major bridge undertaken in a PPP in Canada.

NAV CANADA

In 1996 the federal government entered into an agreement with NAV CANADA, a private non-share capital corporation, to own and operate Canada's civil air navigation system. This made Canada the first country in the world to have a privately owned, operated and financed civil air navigation system. The company employs 5,250 people and manages assets of \$2.2 billion. Revenues for the fiscal year ending August 2001 were \$909 million. Total operating expenses were \$703 million. The federal government is the regulator.

The record of air safety has been enviable. The transfer in service delivery was seamless and the average Canadian would be totally unaware that air traffic and air navigation is being conducted by a private company.

Highway 407 ETR (Electronic Toll Road)

The Province of Ontario, recognizing the congestion problems that were materializing north of Toronto, sought a solution to providing an alternative route to the existing highway which had well exceeded its designed capacity. This project has gone through a couple phases. The first was the award of a design, build and operate contract to Canadian Highways International Corporation. This was an original segment of 69 kilometres complete with the first totally electronic tolling system.

In 1999 the Province sold the 407 ETR to 407 International Inc. for \$3.2 billion CDN making this the largest PPP in Canada to date.

The purchasing consortium is comprised of the Spanish firm Grupo Ferrovial with 61%, SNC-Lavalin, a Canadian based engineering and construction company with 23% and Capital d'Amérique, a wholly owned subsidiary of Caisse de Depot and Placement, a large pension fund based in Quebec, with 16%. The consortium leased the land for 99 years and owns the road, buildings and others structures on the 407 lands. At the end of the lease, these assets will be

transferred to the government. The consortium will finance, design and build deferred interchanges on the original portion and will extend both to the east and west the highway by another 40 kilometres.

Moncton Water Treatment Facility

In 1998, unable to finance a water treatment facility with its own revenue sources, the City of Moncton (a small municipality in New Brunswick) , contracted US Filter (now a Vivendi company) to design, finance, build, operate and maintain a new water treatment facility to serve its community of 100,000. This is a small project, just \$23 million for the original capital outlay and together with the operating contract totals \$85 million over the 20 year contract. However, it was a major undertaking considering it was the first such project in Canada. The project continues to run very well and continues to set high quality standards for other private and public systems to benchmark against.

The 407 Toll Highway project, the largest to date in Canada, is almost matched in scale by a nuclear project which has met its last hurdle of licensing in the past month and which may have particular interest here in the UK:

Bruce Nuclear Power Facility

This is a nuclear facility operated by Ontario Hydro. In the late 90's the Province of Ontario broke up the monopoly that its government power utility had had by splitting up the generation, distribution and retailing of power in Ontario. The generating successor to Ontario Hydro, now called Ontario Power Generation (OPG) solicited proposals from the private sector to operate its 8 Candu reactors which generate 3,140 megawatts of energy. Bruce Power was awarded an 18 year operating lease which also includes the purchase of the inventory. Bruce Power is owned 95% by British Energy and 5% by the two main unions affected by the change of management. (In October 2000, Cameco Corp., the world's largest uranium supplier, purchased a stake in Bruce Power with a \$100 million investment over two years.) The total liability, including historical costs inherited from Ontario Hydro and the future costs associated with the lease, is estimated to be approximately \$3.1 billion (CDN).

Highlighting some of these larger projects demonstrates that there are some very significant ones that have been driven through to approval. And there would certainly be a number of other smaller projects that have met with similar success.

The Canadian Council for Public - Private Partnerships recently released a publication called 100 Projects which highlights projects from across Canada either completed or in stages towards to completion. So it would not be entirely fair to say that Canada is inactive in this field.

It would be fair to say though that the approach to ppp is fragmented, driven by individual projects rather than by government philosophy to achieve an overall objective. It would also be fair to say that we seem to struggle - taking a couple steps forward and then a couple back from time to time. And elections seem to pose the biggest threat to successful ppp programs. Nowhere has that been more apparent than in the Maritime provinces.

Nova Scotia

Nova Scotia was moving along progressively having contracted with various consortia to build and operate the non-academic portions of the schools - some 30 separate school facilities. The first ones completed had been met with unprecedented enthusiasm both for physical design but also for modernization of technology.

The Auditor General of Nova Scotia, compelled to conduct an audit on one, got thoroughly engaged in the debate over “capital lease vs. operating lease” and the impact of “on-balance sheet” and “off-credit” considerations and at the end of the day delivered a less than enthusiastic conclusion. An election was just in the offing and provided a wonderful platform for the party vying to form the new government and upon successfully coming to power, shut the program down. Only the signed contracts will be honored, and they will get their 30 schools. The debate still rages as to whether this was a success or a failure but no supportable empirical study has been undertaken to actually determine the net impact of the program.

Clearly they have 30 schools that they were desperate to have and for which they had no internal capacity to finance. Clearly Ministry of Education representatives to whom The Canadian Council has spoken and who have appeared to speak at conferences we have conducted, say these schools have been delivered at similar or less cost than if they would have been delivered traditionally. Lacking a rigorous public sector comparison, this remains uncertain. Time will tell if this program is reinstated.

Halifax Harbour Solutions:

Again a project in Nova Scotia but this time led by the municipal level in Halifax. Although it seems almost inconceivable, Halifax, a city of 350,000, has no capacity to treat sewage. Effluent flows directly in its untreated condition to what is classified as one of Canada's most important harbours. The Halifax Regional Municipality has attempted over the past 20 years to find a solution to this problem - all unsuccessfully.

Three years ago they decided to start again by issuing a request for proposal for the design, build, operate and maintenance of 4 wastewater treatment plants. Finance was an optional submission. All the major companies were there to compete - Vivendi, Lyonnaise des Eaux, Thames, CH2M, and many others. Total capital costs are approximately \$315 million and annual operating costs projected at \$6.5 million. Although the requests for proposals were submitted in October last year, no successful proponent has emerged although 2 are short listed, CH2M and United Water Services (a Lyonnaise des Eaux company).

The problems in taking this to execution include very strong labour opposition, an intervening municipal election with the election of a mayor who has openly opposed the use of the private sector to operate the facilities and what appears to be a process that has lacked discipline and freedom from political intervention. It is in the courts. Opinions vary as to whether this will actually result in a project or not - and this after each company has committed what some would estimate to be in excess of \$2 million each at this point. It is not our finest moment.

New Brunswick

In the late 90's the provincial government in New Brunswick created a crown corporation called the New Brunswick Highway Corporation to represent the Province in a partnership to finance, build and operate a new 195 kilometre highway between two of its major cities - Moncton and Fredericton. In 1998 it signed a concession agreement with New Brunswick Project Company to operate the new highway for 50 years. The highway would be financed through two types of debt - toll-based debt and lease-based debt.

A private company holds the contract with this group to operate the highway through a 30 agreement. The total capital cost of the project is \$872 million. Again, as the election cycle came into play an opportunity arose to oppose the project and to garner political support from the electorate by casting a shadow on the use of tolls to produce the cash flows to operate and retire the debt of this project.

Again, the opposing party were successful and upon taking power in March

2000, eliminated the tolling system and transferred the debt to the government's books. A shadow toll system is now in place whereby traffic volumes are monitored and classified by type of vehicle with corresponding monthly payments being made to the partner to retire its toll-based debt.

So this pattern of one step forward, one step back has given the impression that there is a lack both of political climate and bureaucratic competence to keep these projects on track. It is probably an unfair assessment and there are signs that offer considerable hope.

The Future

Although the political support is weak and the labour opposition is strong, there are some pressures coming to bear on government that are opening the door.

Certainly in order of importance they would be:

Health/Hospitals: Driven by what some would describe as a crisis in healthcare - that are long waiting lists for certain type of medical examinations and tests, shortage of short and long term beds, and increasing needs for facilities to serve the aging population - serious public discussion is taking place for possibly the first time about the development of facilities with private capital and the operation of non-clinical functions by private operators.

Clearly the Ontario Hospitals Association - the umbrella group for all hospitals in Ontario - has taken a very bold position in endorsing the involvement of the private sector. They have commissioned a study to review the use of private capital in building hospitals. Montreal is also attempting to find a solution to develop a single teaching hospital to replace two aged facilities that have outlived their useful life. Vancouver similarly has a growing need to develop more hospital facilities and has been seeking outside advice on how to do that cooperatively with the private sector.

A National Commission has just been appointed by the federal government and will be led by the former Premier of Saskatchewan, the Hon. Roy Romanow. Its task is, among many, to bring some understanding to the way the private sector can augment the resources - both financial and operational - of the existing healthcare system. This is a major move forward in Canada given the strong public support of a publically delivered health care system. This is a case of a crisis starting to have an impact on the agenda. It is very probable that we will see movement in this area as there are no signs of public funds being available

to address this crisis.

Transportation

Again, very strong signs point in the direction that a number of governments are exploring PPP options to build light rail links between downtown cores to their airports and also major highway projects, largely in the province of Ontario. Vancouver, Montreal and Toronto are in various stages of looking at rail link projects. Some determining the feasibility of private sector partnerships (Translink Vancouver), others with RFP's being drafted which contemplate private sector response (Transport Canada and link from Union Station Toronto to the Lester B. Pearson International Airport). Ottawa also has visions of improving its public transit system - possibly with private sector participation - in the not too distant future.

Water and Wastewater

Water and wastewater systems are almost exclusively delivered in Canada by the municipal sector through public utility commissions or through their own operations. In Ontario there is a provincially owned body called the Ontario Clean Water Association which operates plants throughout Ontario on behalf of municipally owned systems. In Alberta there is a corporation spun out of The City of Edmonton, EPCOR, that is active in water delivery in that province. There are very few truly private operations throughout the entire country at the current time.

In May 2000, a small town in Ontario suffered the single largest water related crisis in Canada - 7 people died as a result of e-coli getting into the water system. Hundreds of others fell ill and there may be permanent damage to some of those. The facility was managed by the town's public utility commission. The impact of that catastrophe has been felt throughout Canada and is the subject of Royal Commission - a review of all circumstances related to the particular events of the Walkerton tragedy - but more comprehensive in the review of the delivery of water in Ontario in general. Very recently another major incident occurred - a cryptosporidium problem arose in North Battleford, Saskatchewan and again it was a publically operated facility.

These two incidents have clearly given rise to discussions centred around two issues:

1. Under- funding of the Infrastructure related to Water and to a lesser extent treatment of wastewater.

2. Public vs. private debate - who can deliver these services most effectively.

Within the past month, the political representatives of cities from all across Canada met, as they do annually, to discuss the issues of the year. This year without exception, water was on the minds of many and more specifically, the inability of revenue generating instruments at the municipal level, to maintain and improve water treatment facilities. Although the debate has largely focused on the need for senior levels of government to flow increased resources to the municipal sector, the reality is that the need is far in excess of what is addressable by any order of government.

As cities age, and one can see a wave go across Canada which matches the historical development of the nation with Montreal showing the earliest warning signs and moving through to later developed locations, the infrastructure is outliving its intended life and little investment has been made to keep it modernized. The UK example should be all that is required to shock this level of government into the reality of what lies ahead unless corrective action is taken.

Wastewater treatment is another issue but suffice to say that there are a large number of smaller centres, Halifax being the exception in terms of size, with untreated wastewater flowing into water courses. Federally this has been recognized and provincial and municipal governments are being encouraged to partner with the private sector to address this in the context of the new tri-government program. There has been little pick-up to date.

Public vs. Private Finance, Development and Operations

No matter how much evidence is placed before the public representatives, there is an inherent interest in seeing the public sector continue to operate water facilities. Strong union resistance is clearly one of the reasons and misinformation, largely distributed by the unions, which points erroneously to mismanagement of such systems by the private sector is another.

The UK model, a beacon of hope to the informed, is cast as a woefully corrupt and unsuccessful attempt to improve water delivery. Environment performance is continually misrepresented as far below that of previous government operations. The list of failures is long they say.

Will this change? Recognizing that there is no choice is the first hurdle. The estimates on the infrastructure investment deficit in this sector across Canada was estimated to be \$44 billion for water supply systems alone in 1996. Without

any question, that figure is larger today as some of the newly emerging threats translate into system sophistication over and above that anticipated in 1996. As these governments recognize the various threats that are ultimately posed by not addressing this issue, logic would dictate that they will have to look to an alternative to publicly financed and operated systems.

A study to be commissioned by the Federation of Canadian Municipalities later this year to get a better estimate of the true investment deficit in this sector in current terms is a much needed reference. It would appear obvious to us working in the PPP field - either in operations or finance - that their best option is to consider a private sector partner.

Correctional Facilities

In correction facilities, we have had our first breakthrough with a project in Canada - in Ontario - through an operation contract awarded to a private company to operate a 1,200-bed facility which was financed by the public sector. This facility is a provincial facility to house adult offenders in a maximum security environment. It is designed in an almost identical pattern to that of another provincially run facility which will continue to be operated by the provincially employed staff. This will allow for some comparisons of efficiencies between the two facilities.

Other sectors:

Information Technology partnerships continue to be natural partnerships in Canada. There are many notable examples largely coming out of such progressive programs as documenting all land titles on line, through cataloguing of case law for the use in the provincial courts, through the on-line access of health records by various healthcare providers and health information exchanges between hospitals, etc. These tend to emerge and get delivered in a much less painful way which is an indication that they involve skills often not resident in the institutions that pursue them and therefore not subject to the same internal opposition.

Influence of the UK PFI

As you will see, much of the PPP activity is either taking place or is planned to take place in Ontario and that is primarily because of an innovative government measure taken to establish a single point in that government to influence future capital expenditures.

In 2000, The Province of Ontario, the most progressive of the provincial governments in respect to PPP currently, established the Ontario SuperBuild Corporation. The name is a bit confusing but the concept is laudable.

Prior to the establishment of the SuperBuild Corporation, all capital programs were developed and delivered through the individual Ministries (or departments). Efforts to identify partnership opportunities as such fell to each and every individual ministry - many of which would have no interest or expertise to judge projects for partnership potential. Ontario SuperBuild was established to be the single point within the Provincial government to consolidate all capital requests and then to identify opportunities that might hold private sector interest.

This also brought together all financing programs made available to the MUSH sector (Municipalities, Universities, Schools and Hospitals) with guidelines to encourage partnering with the private sector where possible. Just over a year into the mandate of this organization, which operates much like a department of the government and reports to the Minister of Finance directly through its Board of Directors made up of public and private representatives, few actual projects have materialized which would demonstrate a new way of doing business. That is largely a result of the great deal of work that was inherited by the SuperBuild organization when it was created - grant programs that were already into their cycle and had to be processed.

Unlike the PFI and the original concept of the UK Task Force, Ontario SuperBuild has a role only to “challenge the government’s public and private partners to identify and support priority infrastructure investments.” Their mandate does not include the provision of the catalytic force such as that led by Adrian Montague in the early stages of the pfi - a team to work with the public organization to move a project from concept to business plan to internal comparative review, to competitive process and then to execution of contract.

So while the framework of the program is to stimulate private sector involvement in traditionally delivered activities and infrastructure development, the actual delivery is a somewhat less integrated methodology which seemingly leaves the other public sector ministries and transfer payment recipient organizations to their own initiatives to actually produce.

It is thought that over time this will need to be reconsidered as many are concerned that a bureaucracy without will a year ago to more heavily engage the private sector in those circumstances where it made sense to do so, is no more skilled or predisposed to do so today. Without the development of an advisory business group to nurture the bureaucracy through some pathfinder projects to

get the process going and to develop the guidance, it is possible that this will not be able to generate any significant progress.

This program was not an outgrowth of the developments in the UK. I think it is fair to say that it was the brain child of an already predisposed political ideology that had been developed a number of years ago - possibly without any outside influence.

Having said that, however, over the past year and with increased exposure to the UK Treasury Task Force and more recently to Partnerships UK, it is clear that the success of the PFI has had a great deal of influence over the refinements to the SuperBuild language and the single minded approach to the reasons that it exists - to achieve value for money.

Cross fertilization of these two programs - decidedly a little one way at the current time - is certainly a likelihood in the future. But it is really The Canadian Council for Public-Private Partnerships that has become the catalyst to much of the cross fertilization taking place in Canada currently between the UK program and developments of agenda by various organizations there. This would be true as well at the federal level having introduced many of these people to the program through introductory sessions conducted in 2000 with Tim Wilson, our moderator today.

I think the success in the UK has provided those of us working in the PPP field with the real world example for us to attempt to replicate in our own culture and reflective of our own priorities. The PFI turned much of what had been theoretical into practical applications which provide the stimuli for others. The extensive modernization being undertaken is impressive in many sectors. Although we have been drawing upon the World Bank experience with private sector partnerships with government for many years, the fact that the environment was one of developing as opposed to developed nations, made that success that much more difficult to be transferred to our home developed countries.

A Role for UK Expertise

Given the fractured nature of the movement in Canada and the difficulty in achieving a great deal of political momentum, the UK experience is increasingly important to us as a model to put before the senior bureaucratic corps and the political representatives. Opportunities to do so will increase until we have one successfully developed program in Canada that will then become the equivalent of the PFI from which Canadian jurisdictions can draw support and expertise.

There are a number of UK companies in the PPP field with offices in Canada. Deloitte Touche, Pricewaterhouse Coopers, Serco, Societe Generale, Amec, Thames Water, etc. The transfer of information to Canada depends largely on the amount of emphasis the Canadian based firms have decided to devote to the PPP agenda. Certainly PWC has transferred the greatest amount of knowledge - and much of that will come through a contract that has been signed by the PWC office in Montreal with the Federal department - Industry Canada - to develop a training program in PPP to be delivered at the municipal level. Others draw on their UK experience as required but any mass marketing campaign using UK representatives seems not to have developed on any great scale at this point.

Perhaps one of the most interesting transfers has arisen with a partnership between a Toronto based law firm, Power Budd and its strategic association with Cameron McKenna in the UK. Power Budd has been taking full advantage of the UK experience in the PPP/PFI market of Cameron McKenna and bringing its own staff up to speed in understanding the general concept of the pfi program. This cross fertilization of expertise gives Power Budd a competitive edge in the field, something we think other UK legal firms should be considering.

Forays by UK firms into the Canadian market are encouraged. Business development people with expertise in the UK bring experience and practical advice that helps to make the case for partnerships in Canada. Creating a wave of evidence too large to ignore is the goal.

The Canadian Council for Public-Private Partnerships can assist in this regard and I would encourage anyone interested in seeking business opportunities in Canada to make contact with this organization as part of your strategy.

Thank you.