

## CHAPTER 3

### AN OVERVIEW OF DEVELOPMENT STUDIES (Social Development & Agriculture, Forestry and Fishery Development Area: Studies Completed in FY1997-FY2002)

### CHAPTER 3. An Overview of Development Studies

(Social development & agriculture, forestry and fishery development area: studies completed in FY 1997 – FY 2002)

This follow-up study covers 1,976 Development Studies completed from FY 1974 to FY 2002, in the social development, agriculture, forestry and fishery development, and mining and industrial development areas.

In this chapter, the status of 379 Development Studies completed in the last six years (FY 1997 to FY 2002) in the social development area and agriculture, forestry and fishery development areas are analyzed. The analysis is based on the criteria used to classify and determine the status of Development Studies in Chapter 1.

#### 1. Status of Completed Studies in the M/P Studies Group

149 out of 160 studies completed from FY 1997 to FY 2002 in the M/P studies group are classified as “In Progress or In Use,” with a utilization rate of 93.1%. This shows that the study findings have been utilized effectively.

Table 3-1 Present Status of the M/P Studies Group  
by Study Completion Year

Study Completion Year	In Progress or In Use	Delayed	Discontinued or Cancelled	Total
1997	18 (100.0%)	0 (0.0%)	0 (0.0%)	18 (100.0%)
1998	25 (100.0%)	0 (0.0%)	0 (0.0%)	25 (100.0%)
1999	22 (91.7%)	2 (8.3%)	0 (0.0%)	24 (100.0%)
2000	24 (92.3%)	2 (7.7%)	0 (0.0%)	26 (100.0%)
2001	32 (88.9%)	4 (11.1%)	0 (0.0%)	36 (100.0%)
2002	28 (90.3%)	3 (9.7%)	0 (0.0%)	31 (100.0%)
Total	149 (93.1%)	11 (6.9%)	0 (0.0%)	160 (100.0%)

### 1-1. Status of Studies by Region

The utilization rate here is analyzed by region, except for the Oceanic region and the European region, where few Development Studies have been conducted. In Asia, where the largest number of studies has been conducted, 63 out of 71 studies are classified as “In Progress or In Use”; the utilization rate of 88.7% is lower than average of all the studies in the M/P studies group (93.1%). In Central and South America and Africa, which have larger numbers of studies, the utilization rates are 97.2% and 95.7% respectively, higher than the average utilization rate. It is concluded that the Development Studies have been utilized effectively in all regions.

**Table 3-2 Utilization Status of the M/P Studies Group by Region**

Present Status	Asia			Middle East	Africa
	ASEAN	Others	Sub-Total		
In Progress or In use	40 (90.9%)	23 (85.2%)	63 (88.7%)	14 (93.3%)	35 (97.2%)
Delayed	4 (9.1%)	4 (14.8%)	8 (11.3%)	1 (6.7%)	1 (2.8%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	44 (100.0%)	27 (100.0%)	71 (100.0%)	15 (100.0%)	36 (100.0%)
Present Status	Central & South America	Oceania	Europe	Plural Countries	Total
In Progress or In use	22 (95.7%)	3 (100.0%)	10 (100.0%)	2 (100.0%)	149 (93.1%)
Delayed	1 (4.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	11 (6.9%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	23 (100.0%)	3 (100.0%)	10 (100.0%)	2 (100.0%)	160 (100.0%)

### 1-2. Status of the M/P Studies Group by Study Type

Analyzing utilization rates by study type, we see that 121 out of 131 M/P studies are classified as “In Progress or In Use,” with a utilization rate of 92.4%, basic studies with 100%, and other studies with 66.7%. It can be concluded that these studies have been utilized effectively in all types of study.

**Table 3-3 Utilization Status of the M/P Studies Group by Type of Study**

Present Status	M/P	Basic Studies	Other Studies	Total
In Progress or In Use	121 (92.4%)	26 (100.0%)	2 (66.7%)	149 (93.1%)
Delayed	10 (7.6%)	0 (0.0%)	1 (33.3%)	11 (6.9%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	131 (100.0%)	26 (100.0%)	3 (100.0%)	160 (100.0%)

### 1-3. Status of the M/P Studies Group by Area and Sector

There are 119 studies in the social development area and 41 in the agriculture, forestry and fishery development area out of 160 studies. The utilization rate for the social development area is 92.4%, while that for the agriculture, forestry and fishery development area is 95.1%. Both rates are above 90%, which is deemed to be quite high.

**Table 3-4 Utilization Status of the M/P Studies Group by Area**

Present Status	Social Development			
	M/P	Basic Studies	Other Studies	Sub-Total
In Progress or In Use	91 (91.9%)	18 (100.0%)	1 (0.0%)	110 (92.4%)
Delayed	8 (8.1%)	0 (0.0%)	1 (0.0%)	9 (7.66%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	997 (100.0%)	18 (100.0%)	2 (0.0%)	119 (100.0%)

Present Status	Agriculture, Forestry and Fisheries Development				Total
	M/P	Basic Studies	Other Studies	Sub-Total	
In Progress or In Use	30 (93.8%)	8 (100.0%)	1 (100.0%)	39 (88.9%)	149 (93.1%)
Delayed	2 (6.33%)	0 (0.0%)	0 (0.0%)	2 (11.1%)	11 (6.9%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	32 (100.0%)	8 (100.0%)	1 (100.0%)	41 (100.0%)	160 (100.0%)

In the social development area, the utilization rates for the planning & administration, transportation, and social infrastructure sub-sectors, all of which include more than 20 studies, are 97.4%, 96.0%, and 96.7% respectively. These utilization rates are very high.

In the agriculture, forestry and fishery development area, the utilization rates are 90.9% for agriculture and 100.0% for forestry, and fishery, again, all of which are quite high.

Table 3-5 Utilization Status of the M/P Studies Group by Sub-sector

Present Status	Planning & Administration	Public Works & Utilities								
		Public Utilities	Transportation						Social Infrastructure	Communications & Broadcasting
			Road	Railway	Ports and Harbors	Air Transportation and Airport	Others	Sub-Total		
In Progress or In Use	38 (97.4%)	4 (80.0%)	7 (100.0%)	2 (100.0%)	4 (100.0%)	2 (100.0%)	9 (90.0%)	24 (96.0%)	29 (96.7%)	3 (100.0%)
Delayed	1 (2.6%)	1 (20.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (10.0%)	1 (4.0%)	1 (3.3%)	0 (0.0%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	39 (100.0%)	5 (100.0%)	7 (100.0%)	2 (100.0%)	4 (100.0%)	2 (100.0%)	10 (100.0%)	25 (100.0%)	30 (100.0%)	3 (100.0%)
Present Status	Commerce & Tourism	Human Resources Development*	Health and Medical Care	Social Welfare	Agriculture, Forestry & Fishery				Others	Total
	Tourism	Human Resources Development	Health and Medical Care	Social Welfare	Agriculture	Animal Husbandry	Forestry	Fishery	Others	
In Progress or In Use	2 (66.7%)	5 (100.0%)	3 (50.0%)	3 (75.0%)	20 (90.9%)	0 (0.0%)	11 (100.0%)	7 (100.0%)	0 (0.0%)	149 (93.1%)
Delayed	1 (33.3%)	0 (0.0%)	3 (50.0%)	1 (25.0%)	2 (9.1%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	11 (6.9%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Total	3 (100.0%)	5 (100.0%)	6 (100.0%)	4 (100.0%)	22 (100.0%)	0 (0.0%)	11 (100.0%)	7 (100.0%)	0 (0.0%)	160 (100.0%)

\* Agriculture, forestry and fishery project (Thailand: The Development Study on Human Resources Training/Development in the Context of Economy in the Rural Areas in the Kingdom of Thailand) is included in the human resources development sector.

#### 1-4. Status of Studies "In Progress or In Use"

##### 1-4-1. Details of Studies "In Progress or In Use"

Out of a total of 160 studies in the M/P studies group, 149 are classified as "In Progress or In Use." Table 3-6 shows the details of studies in progress or in use.

39 studies classified as "In Progress or In Use" (26.2 % of the total) have already been funded, and their proposed projects have been implemented. Especially in regard to M/P studies, 38 out of 121 M/P studies (31.4% of the total M/P studies) are ascertained to be funded. Because basic studies focus on creation of basic data, maps, and topographic surveys rather than proposal of concrete projects, no projects have been funded.

38 studies (25.5% of the total) have been incorporated in national development policy, with project plans put into effect by recipient governments. Especially in regard to basic studies, in 61.5% of the studies, recipient governments have incorporated the studies in formulating national plans and development projects in some ways. In some studies, the proposed projects have materialized in accordance with their fund procurement, with policy proposals also being incorporated in national policies or plans.

In addition, 30 studies have resulted in technical cooperation activities. Of these, two were in the form of project-type technical cooperation, 21 saw dispatches of teams of experts, and in 11 studies, counterparts received technical training in Japan.

Table 3-6 Details of "In Progress or In Use" Studies in the M/P Group

Details	M/P	Basic Studies	Other Studies	Total
Subsequent Studies	33 (27.3%)	1 (3.8%)	0 (0.0%)	34 (22.8%)
Fund Procurement	38 (31.4%)	0 (0.0%)	1 (50.0%)	39 (26.2%)
Japan's Technical Cooperation	26 (21.5%)	3 (11.5%)	1 (50.0%)	30 (20.1%)
National Development Policy/Plans	21 (17.4%)	16 (61.5%)	1 (50.0%)	38 (25.5%)
Others	65 (53.7%)	19 (73.1%)	0 (0.0%)	84 (56.4%)
Total	183	39	3	225
Number of Studies	121 (100.0%)	26 (100.0%)	2 (100.0%)	149 (100.0%)

\* Multiple categories may apply to some items.

#### 1-4-2. Implementation of Subsequent Studies

In "In Progress or In Use" studies (149 in total), 34 studies have been followed by subsequent studies after their completion. As shown in Table 3-7, 11 subsequent studies are F/S studies. This is followed by two B/D studies, one D/D studies. In some cases, more than two subsequent studies have been carried out for one Development Study.

In 33 out of 121 M/P studies (27.3% of the total M/P studies), subsequent studies have been conducted. On the other hand, in basic studies, only one out of 26 studies has been conducted, and in other studies, no subsequent studies have been conducted.

**Table 3-7 Type of Subsequent Study Conducted in "In Progress or In Use" Studies**

Type of Subsequent Study	M/P	Basic Studies	Other Studies	Total
F/S	11	0	0	11
B/D	2	0	0	2
D/D	1	0	0	1
D/D *1	0	0	0	0
D/D *2	0	0	0	0
E/S	0	0	0	0
Review Study	0	0	0	0
Other Study	19	1	0	20
Unknown	3	0	0	3
Total	36	1	0	37
Number of Development Studies with Completed Subsequent Study	33	1	0	34
Total Number of Development Studies	121	26	2	149

\*1 D/D studies with Japan's Grant Aid

\*2 D/D studies conducted by JICA and JBIC

\* Multiple categories may apply to some items.

Table 3-8 shows the periods taken from completion of Development Studies to implementation of subsequent studies. 17 subsequent studies have been implemented within three years after the completion of Development Studies.

It is difficult to clarify the implementation dates for seven subsequent studies (35.0% of the total). Since these studies were implemented by other donor countries and international organizations, detailed information such as implementation dates could not be obtained.

**Table 3-8 Years Elapsed from Completion of Development Studies to Implementation of Subsequent Study**

Elapsed Years	M/P	Basic Studies	Other Studies	Total
Less than 1 Year	9	0	0	9
1 Year	6	0	0	6
2 Years	6	1	0	7
3 Years	3	0	0	3
4 Years	0	0	0	0
5 Years	2	0	0	2
6 Years	0	0	0	0
Unknown	7	0	0	7
Total	33	1	0	34



### 1-4-3. Procurement of Funds

Details of fund procurement are shown in Table 3-9. Although there is a total of 54 fund sources, some studies were funded by multiple sources. Thus, in 39 of the studies in the M/P studies group, funds have been procured for materialization of the proposed projects. Financial assistance from Japan was provided for 16 studies (41.0% of the total) though 21 projects were self-funded, two of these also received financial assistance from Japan.

Table 3-9 Details of Fund Procurement

Details	M/P	Basic Studies	Other Studies	Total
Japan's ODA Loan	5 (13.2%)	0 (0.0%)	1 (100.0%)	6 (15.4%)
Japan's Grant Aid	10 (26.3%)	0 (0.0%)	0 (0.0%)	10 (25.6%)
Export and Import Bank of Japan	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
International Organizations	6 (15.8%)	0 (0.0%)	0 (0.0%)	6 (15.4%)
Other Donor Countries	4 (10.5%)	0 (0.0%)	0 (0.0%)	4 (10.3%)
Own Fund	20 (52.6%)	0 (0.0%)	1 (100.0%)	21 (53.8%)
Private Fund	3 (7.9%)	0 (0.0%)	0 (0.0%)	3 (7.7%)
Others	2 (5.3%)	0 (0.0%)	0 (0.0%)	2 (5.1%)
Unknown	2 (5.3%)	0 (0.0%)	0 (0.0%)	2 (5.1%)
Total	52	0	2	54
Number of Development Studies which have Funded Project	38 (100.0%)	0 (0.0%)	1 (100.0%)	39 (100.0%)
Total Number of Development Studies	121	26	2	149

\* Multiple categories may apply to some items.

Table 3-10 shows the number of studies funded with Japanese assistance (loan and grant), are listed by sectors. The numbers of studies funded with ODA loans and grants were six and ten respectively. While five out of six studies in the social development area and one of six studies in the agricultural development area have been funded with ODA loans, grants were given to six out of ten studies in the social development area and four out of ten studies in agricultural area. The social development area has been funded more than the agricultural development area.

Table 3-10 Number of Studies Funded with Japanese Assistance by Sector

Sector	1997		1998		1999		2000		2001		2002		Total	
	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid
Planning & Administration	1 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (50.0%)	0 (0.0%)	0 (0.0%)	1 (100.0%)	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	3 (50.0%)	1 (10.0%)
Public Works & Utilities	Public Utilities	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
	Transportation	0 (0.0%)	1 (100.0%)	0 (0.0%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (20.0%)
	Social Infrastructure	0 (0.0%)	0 (0.0%)	1 (100.0%)	0 (0.0%)	1 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (33.3%)
	Communications & Broadcasting	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (25.0%)	0 (0.0%)
	Sub-Total	0 (0.0%)	1 (100.0%)	1 (100.0%)	1 (33.3%)	1 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (25.0%)	3 (30.0%)
Commerce & Tourism	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Human Resources Development	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (100.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Health and Medical Care	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Social Welfare	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Agriculture, Forestry & Fishery	Agriculture	1 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (50.0%)	1 (16.7%)	
	Animal Husbandry	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
	Forestry	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
	Fishery	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (25.0%)	0 (0.0%)	
	Sub-Total	1 (50.0%)	0 (0.0%)	0 (0.0%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	3 (75.0%)	1 (16.7%)	
Others	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)		
Total	2 (100.0%)	1 (100.0%)	1 (100.0%)	3 (100.0%)	2 (100.0%)	0 (0.0%)	0 (0.0%)	1 (100.0%)	1 (100.0%)	1 (100.0%)	0 (0.0%)	4 (100.0%)	6 (100.0%)	

Table 3-11 shows the time from the completion of Development Studies to fund procurement. When funding was in the form of Japanese ODA loans, the year of fund procurement is defined as the year in which an L/A was executed; in the case of Grant Aid, it is defined as the year in which an E/N was executed; with other types of funding, it is the year in which the financial assistance was executed. In 24 out of 39 projects being funded (61.5% of the total), some types of funding was secured within three years, while in 26 studies (66.7% of the total) was done within five years. Especially, projects based on other studies have been funded in the early stage. Although 34.2% of the funded projects in M/P studies have unclear financing dates, 65.8% of them were funded within five years after the completion of studies.

**Table 3-11 Years Elapsed from Completion of Development Studies to Fund Procurement**

Elapsed Years	M/P	Basic Studies	Other Studies	Total
Less than 1 Year	11 (28.9%)	0 (0.0%)	1 (100.0%)	12 (30.8%)
1 Year	8 (21.1%)	0 (0.0%)	0 (0.0%)	8 (20.5%)
2 Years	2 (5.3%)	0 (0.0%)	0 (0.0%)	2 (5.1%)
3 Years	2 (5.3%)	0 (0.0%)	0 (0.0%)	2 (5.1%)
4 Years	2 (5.3%)	0 (0.0%)	0 (0.0%)	2 (5.1%)
5 Years	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
More than 6 Years	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Unknown	13 (34.2%)	0 (0.0%)	0 (0.0%)	13 (33.3%)
Number of Development Studies	38 (100.0%)	0 (0.0%)	1 (100.0%)	39 (100.0%)

#### 1-4-4. Factors to Progress /Use Studies

There are many factors that allow a study to be utilized effectively and proposed projects be funded appropriately. These factors include consistency with national plans, appropriate project details, priority and conformance to national plans, urgency of proposed project, and benefits which the project can generate.

#### 1-4-5. Perspective of Studies in the M/P Studies Group

Table 3-12 shows the perspective of 149 studies "In Progress or In Use". In 101 studies, formal requests for funds were submitted or subsequent actions were taken. In 32 studies, there is no information on the requests for funds and subsequent actions. Follow-up studies were planned to be finished in 16 studies, as it was confirmed that the proposed projects were implemented, that they were utilized to formulate national plans or projects, or that they were used as basic data for the formulation of development projects.

As for studies for which subsequent actions were taken or which were under preparation, there were 54 studies where funds were procured (53.5% of the total), 16 studies (15.9%) whereby subsequent studies were implemented, and 29 requests (28.7%) for Japanese technical cooperation. Of 29 requests for fund procurement, 8 were for Japanese ODA loans and 25 for Japanese Grant Aid. The subsequent studies consist of 5 F/S studies and one D/D study.

In some studies, it is unknown whether formal requests were submitted or subsequent actions were taken. Concerning the reasons behind, in some cases, it has been surmised that concrete actions have not been taken yet as it is not long after the completion of the studies. And in other cases, there are some studies such as topographic mapping which are not suitable for realization of projects or implementation of subsequent feasibility studies, although results of the studies have been utilized for formulation of national plans / policies.

Table 3-12 Perspective of "In Progress or In Use" Studies in the M/P Group

Perspectives	M/P	Basic Studies	Other Studies	Total
Formal requests are submitted or subsequent actions are taken	72	8	1	81
Formal requests/subsequent actions are under preparation.	17	3	0	20
Total	89	11	1	101
Subsequent Studies	15	1	0	16
Fund Procurement	51	2	1	54
Japan's Technical Cooperation	24	5	0	29
Others	20	4	0	24
Total	110	12	1	123
Formal requests/subsequent actions are not confirmed.	27	5	0	32
FU has been completed.	5	10	1	16
Total Number of Development Studies	121	26	2	149

\* Multiple categories may apply to some items.

## 1-5. Status of Studies “Delayed, Discontinued or Cancelled”

### 1-5-1. Status of Studies “Delayed, Discontinued or Cancelled”

Out of 160 studies in the M/P studies group, 11 were “Delayed,” and with no study classified as “Discontinued or Cancelled,” this accounts for only 6.9% of the total. Table 3-13 shows the number of studies classified as “Delayed”.

- (1) Out of 131 M/P studies, ten studies were classified as “Delayed,” and no study was “Discontinued or Cancelled”. These ten studies comprise 7.6% of the total.
- (2) Concerning basic studies, no study was classified as “Delayed” or “Discontinued or Cancelled”.
- (3) Concerning other studies, one out of three studies were classified as “Delayed”, and no study was classified as “Discontinued or Cancelled”.

Out of all of the “Delayed” studies, one formal request has been made to conduct a subsequent study to implement the prioritized projects. Concerning seven out of 11 “Delayed” studies, no less than two years have been passed after the completion of the studies, therefore, it can be assumed that more time is required in the process of determination to take concrete actions for the next step.

Table 3-13 Details of Request of "Delayed" and "Discontinued or Cancelled" Studies of M/P Group

Details	Delayed			Total
	M/P	Basic Studies	Other Studies	
Formally Requested	1	0	0	1
No Formal Request	9	0	1	10
Total Number of Development Studies	10	0	1	11

\* Multiple categories may apply to some items.

### 1-5-2. Reasons for Delay, Discontinuation and Cancellation of Studies

The following describes reasons for delays in 11 studies.

- Political reasons such as changes in national development plans and changes in priority for development plans
- Administrative reasons such as reorganization of counterpart agencies in recipient countries.
- Financial reasons such as difficulties in procurement of finances.

- External reasons such as deterioration of public order, occurrence of natural disasters and changes in project site situations.

Since consistency in development policy is important in utilizing the results of Development Studies, inconsistencies in policy due to internal factors such as political changes and external factors such as regional economic crisis affect utilization of Development Studies.

**Table 3-14 Reasons for "Delayed" and "Discontinued or Cancelled" Studies of the M/P Group**

	Delayed			Total
	M/P	Basic Studies	Other Studies	
Difficulty in Fund Procurement from Foreign Countries	1	0	0	1
Political Factor	1	0	0	1
Economic Factor	1	0	0	1
Policy-Related Factor	0	0	0	0
Administrative Factor	2	0	0	2
Lack/Decline of Feasibility	0	0	0	0
Inappropriate Project Scale	0	0	0	0
Postponement of Related Project	0	0	0	0
Poor Security	1	0	0	1
Natural Disaster	0	0	0	0
Others	1	0	0	1
Unknown	4	0	1	5
Total	11	0	1	12
Number of Development Studies	10	0	1	11

1-5-3. Perspective on "Delayed" Studies in the M/P Studies Group

Table 3-15 shows the present situation of the 15 studies which were classified as "Delayed" in FY 2002. Eight out of 15 "Delayed" studies in FY 2001 were reclassified as "In Progress or In Use" in FY 2003,

However, seven "Delayed" studies in FY 2002 still remain "Delayed" in FY 2003. The probable reason for this is that there is little information of the status of the studies as no less than three years have passed after the completion of the studies, or that some factors such as political changes and economic crisis might have hindered progress of studies, or that delay of the related projects may have caused additional delay in progress.

Table 3-15 Present Status of Studies Categorized as "Delayed" in FY 2002

Study Type	Present Status	Number of Present Status (FY2002)	Number of Present Status (FY2003)					
			Total	Completion Year				
				1997	1998	1999	2000	2001
M/P	In Progress or In Use	0	7	0	0	1	1	5
	Delayed	14	7	0	0	2	2	3
	Discontinued or Cancelled	0	0	0	0	0	0	0
Other Studies	In Progress or In Use	0	1	0	1	0	0	0
	Delayed	1	0	0	0	0	0	0
	Discontinued or Cancelled	0	0	0	0	0	0	0
Total		15	15	0	1	3	3	8

## 2. Status of Completed Studies in the F/S Studies Group

A total of 219 studies in the F/S studies group were completed from FY 1997 to FY 2002. The details are as follows:

- (1) F/S studies: 65 (29.7%)
- (2) M/P + F/S studies: 138 (63.0%)
- (3) D/D studies: 16 (7.3%)

The status of realization of study findings are as follows: 107 “Completed or In Progress”(48.9%); 101 “Under Promotion” (46.1%); 10 “Delayed or Suspended” (4.6%); and one “Discontinued or Cancelled”(0.5%).

**Table 3-16 Status of Realization of the F/S Studies Group**

Study Completion Year	Completed or In Progress				Sub-Total	Under Promotion	Delayed or Suspended	Discontinued or Cancelled	Total
	Completed	Partially Completed	Under Implementation	In Process					
1997	1 (2.3%)	13 (30.2%)	11 (25.6%)	3 (7.0%)	28 (65.1%)	13 (30.2%)	2 (4.7%)	0 (0.0%)	43 (100.0%)
1998	5 (13.5%)	2 (5.4%)	11 (29.7%)	3 (8.1%)	21 (56.8%)	14 (37.8%)	1 (2.7%)	1 (2.7%)	37 (100.0%)
1999	2 (4.5%)	3 (6.8%)	10 (22.7%)	8 (18.2%)	23 (52.3%)	20 (45.5%)	1 (2.3%)	0 (0.0%)	44 (100.0%)
2000	2 (6.3%)	1 (3.1%)	8 (25.0%)	4 (12.5%)	15 (46.9%)	16 (50.0%)	1 (3.1%)	0 (0.0%)	32 (100.0%)
2001	0 (0.0%)	1 (3.6%)	7 (25.0%)	2 (7.1%)	10 (35.7%)	17 (60.7%)	1 (3.6%)	0 (0.0%)	28 (100.0%)
2002	0 (0.0%)	0 (0.0%)	3 (8.6%)	7 (20.0%)	10 (28.6%)	21 (60.0%)	4 (11.4%)	0 (0.0%)	35 (100.0%)
<b>Total</b>	10 (4.6%)	20 (9.1%)	50 (22.8%)	27 (12.3%)	107 (48.9%)	101 (46.1%)	10 (4.6%)	1 (0.5%)	219 (100.0%)



As regard to the trend of realization rate of the last six years (FY 1997-2002), 61 are "Completed or In Progress". The rate of FY 1997 was 65.1%, and around 50 % in both FY 1998 and 1999.

The realization rates of FY 2000, 2001 and 2002 were around 20 to 40 %, and most of the studies were classified as "Under Promotion" as little time has passed since these studies were completed. Therefore, it is expected that rates will go up in accordance with the realization of these studies "Under Promotion".

Table 3-17 Trend of Realization Rates for the F/S Studies Group

Present Status	1997	1998	1999	2000	2001	2002	Total
Completed	1	5	2	2	0	0	10
Partially Completed	13	2	3	1	1	0	20
Under Implementation	11	11	10	8	7	3	50
In Process	3	3	8	4	2	7	27
Sub-Total	28	21	23	15	10	10	107
Rate of Realization	(65.1%)	(56.8%)	(52.3%)	(46.9%)	(35.7%)	(28.6%)	(48.9%)
Under Promotion	13	14	20	16	17	21	101
Delayed or Suspended	2	1	1	1	1	4	10
Discontinued or Cancelled	0	1	0	0	0	0	1
Total	43	37	44	32	28	35	219

## 2-1. Realization Status of Completed Studies by Region

The realization rate here is analyzed by region, except for Oceania, Europe and Multiple Countries, where few Development Studies have been conducted. Out of 120 completed studies in Asia, 61 are "Completed or In Progress". The realization rate is 50.8%, which is above the average rate of all the studies in the F/S studies group (48.9%). The realization rate in ASEAN is 48.6%, while that for the rest of Asia is 54.2%. Realization rates are 65.2% in Middle East, 48.1% in Africa and 30.0% in Central and South America.

Since 70.0% of these studies in Central and South America and 44.4% in Africa are classified as "Under Promotion," their realization rates ought to rise in the near future.

Table 3-18 Present Status of the F/S Studies Group by Region

Present Status	Asia			Middle East	Africa	Central & South America	Oceania	Europe	Multiple Countries	Total
	ASEAN	Others	Sub-total							
Completed or In Progress	35 (48.6%)	26 (54.2%)	61 (50.8%)	15 (65.2%)	13 (48.1%)	9 (30.0%)	1 (33.3%)	5 (41.7%)	3 (75.0%)	107 (48.9%)
Completed	3 (4.2%)	2 (4.2%)	5 (4.2%)	0 (0.0%)	3 (11.1%)	1 (3.3%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	10 (4.6%)
Partially completed	4 (5.6%)	5 (10.4%)	9 (7.5%)	4 (17.4%)	3 (11.1%)	2 (6.7%)	0 (0.0%)	1 (8.3%)	1 (25.0%)	20 (9.1%)
Under Implementation	16 (22.2%)	12 (25.0%)	28 (23.3%)	10 (43.5%)	6 (22.2%)	3 (10.0%)	0 (0.0%)	2 (16.7%)	1 (25.0%)	50 (22.8%)
In Process	12 (16.7%)	7 (14.6%)	19 (15.8%)	1 (4.3%)	1 (3.7%)	3 (10.0%)	0 (0.0%)	2 (16.7%)	1 (25.0%)	27 (12.3%)
Under Promotion	31 (43.1%)	20 (41.7%)	51 (42.5%)	8 (34.8%)	12 (44.4%)	21 (70.0%)	1 (33.3%)	7 (58.3%)	1 (25.0%)	101 (46.1%)
Delayed or Suspended	6 (8.3%)	1 (2.1%)	7 (5.8%)	0 (0.0%)	2 (7.4%)	0 (0.0%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	10 (4.6%)
Discontinued or Cancelled	0 (0.0%)	1 (2.1%)	1 (0.8%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (0.5%)
<b>Total</b>	72 (100.0%)	48 (100.0%)	120 (100.0%)	23 (100.0%)	27 (100.0%)	30 (100.0%)	3 (100.0%)	12 (100.0%)	4 (100.0%)	219 (100.0%)

Table 3-19 shows trends in realization rates in Asia, where the largest number of study have been conducted. The realization rate is 50.8%.The low rates from FY 2001 to FY 2002 are due to the fact that most of studies are classified as “Under Promotion.” It is thought that once these studies are implemented, the realization rates will rise.

**Table 3-19 Trend in Realization Rates in Asia**

Present Status	1997	1998	1999	2000	2001	2002	Total
Completed	0	2	1	2	0	0	5
Partially Completed	6	0	2	1	0	0	9
Under Implementation	5	6	4	5	5	3	28
In Process	2	1	7	3	1	5	19
Sub-Total	13	9	14	11	6	8	61
Realization Rate	(56.5%)	(52.9%)	(63.6%)	(52.4%)	(46.2%)	(33.3%)	(50.8%)
Under Promotion	8	7	8	10	6	12	51
Delayed or Suspended	2	0	0	0	1	4	7
Discontinued or Cancelled	0	1	0	0	0	0	1
Total	23	17	22	21	13	24	120

## 2-2. Realization Status of Completed Studies by Study Type

Of 219 completed studies, 107 are "Completed or In Progress" and the realization rate is 48.9%. Therefore, it is concluded that the status of realization of study findings is favorable. With a realization rate of 87.5%, D/D studies have the highest of such rate in the three categories. As for the other 12% of D/D studies, (D/D studies besides those classified as "Completed or In Progress"), the partner countries also gave high priority to them, and requests for financial assistance have already been made. In this light, further prospects of the projects are dependent on availability of financial assistance. In addition, others remain "Under Promotion" for financial reasons which require a revision of their financial plans.

40 to 50 % of the studies in M/P + F/S and F/S are classified as "Under Promotion", while this is the case in 12.5 % of the studies in D/D. This shows that there are many studies under examination remained to be realized in M/P + F/S and F/S.

Table 3-20 Present Status of the F/S Studies Group by Type of Study

Present Status	M/P+F/S	F/S	D/D	Total
Completed or In Progress	61 (44.2%)	32 (49.2%)	14 (87.5%)	107 (48.9%)
Completed	4 (2.9%)	6 (9.2%)	0 (0.0%)	10 (4.6%)
Partially Completed	9 (6.5%)	10 (15.4%)	1 (6.3%)	20 (9.1%)
Under Implementation	32 (23.2%)	13 (20.0%)	5 (31.3%)	50 (22.8%)
In Process	16 (11.6%)	3 (4.6%)	8 (50.0%)	27 (12.3%)
Under Promotion	70 (50.7%)	29 (44.6%)	2 (12.5%)	101 (46.1%)
Delayed or Suspended	6 (4.3%)	4 (6.2%)	0 (0.0%)	10 (4.6%)
Discontinued or Cancelled	1 (0.7%)	0 (0.0%)	0 (0.0%)	1 (0.5%)
Total	138 (100.0%)	65 (100.0%)	16 (100.0%)	219 (100.0%)

### 2-3. Realization Status of Completed Studies by Sector

The social development area includes 166 completed studies, while the agriculture, forestry and fishery development area has 53. The realization rate is 52.4 % for the social development area and 37.7% for the agriculture, forestry and fishery development area. The difference between the realization rates for social development and agriculture, forestry and fishery development is around 14.7%. One of the reasons of the difference being that the rate of "Under Promotion" studies, which are not yet realized but are expected to be realized in the near future, is relatively high and in the forestry and fishery development area.

In the social development area, the realization rate is 53.7% for F/S studies, 46.4% for M/P + F/S studies, and 93.3% for D/D studies. It is thought that D/D has the highest realization rate because most D/D studies are preconditioned on existing financial assistance. The one remaining unrealized D/D study was just conducted in FY 2000, and procurement of Japanese ODA loan is being expected to develop the study.

The realization rate for the agriculture, forestry and fishery development area is lower than that for the social development area. The realization rate for M/P + F/S is 35.7%, while that for F/S is 41.7%.

Table 3-21 Present Status by Sector and Type of Study

Present Status	Social Development				Agriculture, Forestry and Fishery Development				Total
	M/P+F/S	F/S	D/D	Sub-total	M/P+F/S	F/S	D/D	Sub-total	
Completed or In Progress	51 (46.4%)	22 (53.7%)	14 (93.3%)	87 (52.4%)	10 (35.7%)	10 (41.7%)	0 (0.0%)	20 (37.7%)	107 (48.9%)
Completed	3 (2.7%)	4 (9.8%)	0 (0.0%)	7 (4.2%)	1 (3.6%)	2 (8.3%)	0 (0.0%)	3 (5.7%)	10 (4.6%)
Partially Completed	6 (5.5%)	5 (12.2%)	1 (6.7%)	12 (7.2%)	3 (10.7%)	5 (20.8%)	0 (0.0%)	8 (15.1%)	20 (9.1%)
Under Implementation	27 (24.5%)	10 (24.4%)	5 (33.3%)	42 (25.3%)	5 (17.9%)	3 (12.5%)	0 (0.0%)	8 (15.1%)	50 (22.8%)
In Process	15 (13.6%)	3 (7.3%)	8 (53.3%)	26 (15.7%)	1 (3.6%)	0 (0.0%)	0 (0.0%)	1 (1.9%)	27 (12.3%)
Under Promotion	56 (50.9%)	17 (41.5%)	1 (6.7%)	74 (44.6%)	14 (50.0%)	12 (50.0%)	1 (100.0%)	27 (50.9%)	101 (46.1%)
Delayed or Suspended	2 (1.8%)	2 (4.9%)	0 (0.0%)	4 (2.4%)	4 (14.3%)	2 (8.3%)	0 (0.0%)	6 (11.3%)	10 (4.6%)
Discontinued or Cancelled	1 (0.9%)	0 (0.0%)	0 (0.0%)	1 (0.6%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (0.5%)
Total	110 (100.0%)	41 (100.0%)	15 (100.0%)	166 (100.0%)	28 (100.0%)	24 (100.0%)	1 (100.0%)	53 (100.0%)	219 (100.0%)

Transportation is the largest sub-sector of the social development area. The realization rate for this sub-sector is 57.6%, which is higher than the overall average (48.9%). In the transportation sub-sector, the air transportation & airport sub-sub-sector shows the highest realization rate (100.0%). The agriculture sub-sector, with 40 out of 53 studies, occupies the largest portion of the agriculture, forestry and fishery sector. The realization rate for agriculture sub-sector is 35.0%, lower than the overall average of the agriculture, forestry and fishery sector. Since there are few studies in the animal husbandry in forestry and fishery sub-sectors, it is difficult to evaluate their realization rates accurately.

Table 3-22 Present Status by Sub-sector

Present Status	Planning & Administration	Public Works & Utilities								
		Public Utilities	Transportation					Social Infrastructure	Communications & Broadcasting	
			Road	Railway	Ports and Harbors	Air Transportation & Airport	Others			Sub-total
Completed or In Progress	7 (77.8%)	23 (54.8%)	17 (60.7%)	1 (25.0%)	11 (64.7%)	4 (100.0%)	5 (38.5%)	38 (57.6%)	13 (39.4%)	0 (0.0%)
Completed	0 (0.0%)	1 (2.4%)	3 (10.7%)	0 (0.0%)	1 (5.9%)	1 (25.0%)	0 (0.0%)	5 (7.6%)	1 (3.0%)	0 (0.0%)
Partially Completed	0 (0.0%)	4 (9.5%)	4 (14.3%)	1 (25.0%)	1 (5.9%)	1 (25.0%)	1 (7.7%)	8 (12.1%)	0 (0.0%)	0 (0.0%)
In Progress	5 (55.6%)	13 (31.0%)	6 (21.4%)	0 (0.0%)	4 (23.5%)	1 (25.0%)	2 (15.4%)	13 (19.7%)	6 (18.2%)	0 (0.0%)
In Process	2 (22.2%)	5 (11.9%)	4 (14.3%)	0 (0.0%)	5 (29.4%)	1 (25.0%)	2 (15.4%)	12 (18.2%)	6 (18.2%)	0 (0.0%)
Under Promotion	2 (22.2%)	18 (42.9%)	9 (32.1%)	3 (75.0%)	6 (35.3%)	0 (0.0%)	7 (53.8%)	25 (37.9%)	19 (57.6%)	2 (100.0%)
Delayed or Suspended	0 (0.0%)	1 (2.4%)	1 (3.6%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (7.7%)	2 (3.0%)	1 (3.0%)	0 (0.0%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	1 (3.6%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (1.5%)	0 (0.0%)	0 (0.0%)
Total	9 (100.0%)	42 (100.0%)	28 (100.0%)	4 (100.0%)	17 (100.0%)	4 (100.0%)	13 (100.0%)	66 (100.0%)	33 (100.0%)	2 (100.0%)

Present Status	Commerce & Tourism	Human Resources Development	Health & Medical Care	Social Welfare	Agriculture, Forestry & Fishery				Others	Total
	Tourism	Human Resources Development	Health & Medical Care	Social Welfare	Agriculture	Animal Husbandry	Forestry	Fishery	Others	
Completed or In Progress	3 (60.0%)	1 (100.0%)	0 (0.0%)	2 (25.0%)	14 (35.0%)	0 (0.0%)	3 (37.5%)	3 (60.0%)	0 (0.0%)	107 (48.9%)
Completed	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (5.0%)	0 (0.0%)	0 (0.0%)	1 (20.0%)	0 (0.0%)	10 (4.6%)
Partially Completed	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	5 (12.5%)	0 (0.0%)	1 (12.5%)	2 (40.0%)	0 (0.0%)	20 (9.1%)
In Progress	3 (60.0%)	1 (100.0%)	0 (0.0%)	1 (12.5%)	6 (15.0%)	0 (0.0%)	2 (25.0%)	0 (0.0%)	0 (0.0%)	50 (22.8%)
In Process	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (12.5%)	1 (2.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	27 (12.3%)
Under Promotion	2 (40.0%)	0 (0.0%)	0 (0.0%)	6 (75.0%)	23 (57.5%)	0 (0.0%)	3 (37.5%)	1 (20.0%)	0 (0.0%)	101 (46.1%)
Delayed or Suspended	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	3 (7.5%)	0 (0.0%)	2 (25.0%)	1 (20.0%)	0 (0.0%)	10 (4.6%)
Discontinued or Cancelled	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (0.5%)
Total	5 (100.0%)	1 (100.0%)	0 (0.0%)	8 (100.0%)	40 (100.0%)	0 (0.0%)	8 (100.0%)	5 (100.0%)	0 (0.0%)	219 (100.0%)

Table 3-23 shows trends over time in realization rates of the transportation sub-sector, which was the largest sub-sector during the period FY 1997 – FY 2002. The realization rate of the transportation sub-sector had been consistently remained high before FY 1998, ranging around 80%. The realization rates for FY 2000 and FY 2002 are relatively low due to the fact that little time has elapsed after the completion of the studies. Therefore, it is expected that these will go up in accordance with the realization of many studies “Under Promotion”.

**Table 3-23 Time Trend of the Realization Rate for Transportation Sector**

Present Status	1997	1998	1999	2000	2001	2002	Total
Completed	0	3	2	0	0	0	5
Partially Completed	5	0	3	0	0	0	8
Under Implementation	2	4	3	2	2	0	13
In Process	2	2	4	2	0	2	12
Sub-Total	9	9	12	4	2	2	38
Realization Rate	(81.8%)	(81.8%)	(80.0%)	(57.1%)	(20.0%)	(16.7%)	(57.6%)
Under Promotion	2	1	3	3	8	8	25
Delayed or Suspended	0	0	0	0	0	2	2
Discontinued or Cancelled	0	1	0	0	0	0	1
Total	11	11	15	7	10	12	66

#### 2-4. Status of Studies “Completed or In Progress”

##### 2-4-1. Details of Analysis of Studies “Completed or In Progress”

As shown in Table 3-24, studies classified as “Completed” or “In Progress” are further divided into four subcategories: “Completed,” “Partially Completed,” “Under Implementation” and “In Process.” 107 out of 219 studies completed have been classified as “Completed” or “In Progress”. These 107 studies consist of 10 “Completed” studies, 20 “Partially Completed” studies, 50 “Under Implementation” studies and 27 “In Process” studies.



In nearly all the 107 studies classified as “Completed” or “In Progress”, the funds have been procured and the proposed projects materialized; as an exception, the Participatory Development Study was regarded as “Completed” without fund procurement. Four out of 27 studies categorized in “In Process” status were included in studies with funds being procured, as their loan agreements were definitely about to be concluded

Table 3-24 Details of "Completed or In Progress" Studies of the F/S Group

Present Status	Type of Study	Details				Total	Total Number of Development Studies
		Subsequent Studies	Fund Procurement	Japan's Technical Cooperation	Others		
Completed	M/P+F/S	2	4	2	1	9	4
	F/S	2	5	0	1	8	6
	D/D	0	0	0	0	0	0
	Sub-Total	4	9	2	2	17	10
Partially Completed	M/P+F/S	7	9	3	0	19	9
	F/S	6	10	1	0	17	10
	D/D	0	1	0	0	1	1
	Sub-Total	13	20	4	0	37	20
Under Implementation	M/P+F/S	7	32	6	0	45	32
	F/S	6	13	3	1	23	13
	D/D	0	5	0	0	5	5
	Sub-Total	13	50	9	1	73	50
In Process	M/P+F/S	7	16	0	2	25	16
	F/S	3	3	0	0	6	3
	D/D	0	8	0	0	8	8
	Sub-Total	10	27	0	2	39	27
Total		40	106	15	5	166	107

\* Multiple categories may apply to some items.

#### 2-4-2. Implementation of Subsequent Studies

In 40 (37.4%) out of 107 studies “Completed” or “In Progress”, subsequent studies have been implemented. By subcategory, the subsequent studies have been implemented in four (40.0%) of 10 “Completed” studies, 13 (65.0%) of 20 “Partially Completed” studies, 13 (26.0%) of 50 “Under Implementation” studies, and 10 (37.0%) of 27 “In Process” studies.

In most of the D/D studies, the funds have been procured without subsequent studies; this is due to the nature of D/D studies.

The subsequent studies in 40 “Completed” or “In Progress” studies were categorized into four following types of subsequent study.

- (1) B/D: 18 studies
- (2) D/D: 17 studies
- (3) Others: 5 studies
- (4) Unknown: 5 studies

Some Development Studies have more than one subsequent study.

Table 3-25 Type of Subsequent Study

Present Status	Type of Study	Type of Subsequent Study										*1 Total	*2 Total
		F/S	B/D	D/D	D/D*	D/D**	E/S	Review Study	Others	Unknown	Total		
Completed	M/P+F/S	0	1	0	1	0	0	0	0	0	2	2	4
	F/S	0	1	0	1	0	0	0	0	1	3	2	6
	D/D	0	0	0	0	0	0	0	0	0	0	0	0
	Sub-Total	0	2	0	2	0	0	0	0	1	5	4	10
Partially Completed	M/P+F/S	0	4	2	1	0	0	0	0	1	8	7	9
	F/S	0	3	2	1	0	0	0	0	2	8	6	10
	D/D	0	0	0	0	0	0	0	0	0	0	0	1
	Sub-Total	0	7	4	2	0	0	0	0	3	16	13	20
Under Implementation	M/P+F/S	0	2	0	1	0	0	0	3	1	7	7	32
	F/S	0	4	1	1	0	0	0	1	0	7	6	13
	D/D	0	0	0	0	0	0	0	0	0	0	0	5
	Sub-Total	0	6	1	2	0	0	0	4	1	14	13	50
In Process	M/P+F/S	0	2	2	0	2	0	0	1	0	7	7	16
	F/S	0	1	0	1	1	0	0	0	0	3	3	3
	D/D	0	0	0	0	0	0	0	0	0	0	0	8
	Sub-Total	0	3	2	1	3	0	0	1	0	10	10	27
Total		0	18	7	7	3	0	0	5	5	45	40	107

\* : D/D studies with Japan's Grant Aid

\*\* : D/D studies conducted by JICA and JBIC

\*1: Number of Development Studies with completed subsequent study

\*2: Total number of Development Studies

\* Multiple categories may apply to some items.

As shown in Table 3-26, 30 (75.0%) subsequent studies were implemented within three years after the completion of the Development Studies, and all subsequent studies, except for the studies whose timing of the subsequent studies is unknown, were carried out within four years. It is concluded that subsequent studies for the "Completed" subcategory are carried out in early stages.

**Table 3-26 Years Elapsed from Completion of Development Studies to Implementation of Subsequent Study**

Present Status	Type of Study	Elapsed Years								Total
		Less than 1 Year	1 Year	2 Years	3 Years	4 Years	5 Years	More than 6 Years	Unknown	
Completed	M/P+F/S	0	2	0	0	0	0	0	0	2
	F/S	1	0	1	0	0	0	0	0	2
	D/D	0	0	0	0	0	0	0	0	0
	Sub-Total	1	2	1	0	0	0	0	0	4
Partially Completed	M/P+F/S	1	0	2	1	1	0	0	2	7
	F/S	2	1	1	1	1	0	0	0	6
	D/D	0	0	0	0	0	0	0	0	0
	Sub-Total	3	1	3	2	2	0	0	2	13
Under Implementation	M/P+F/S	2	0	1	1	2	0	0	1	7
	F/S	0	2	1	3	0	0	0	0	6
	D/D	0	0	0	0	0	0	0	0	0
	Sub-Total	2	2	2	4	2	0	0	1	13
In Process	M/P+F/S	2	1	0	1	1	0	0	2	7
	F/S	1	2	0	0	0	0	0	0	3
	D/D	0	0	0	0	0	0	0	0	0
	Sub-Total	3	3	0	1	1	0	0	2	10
Total		9	8	6	7	5	0	0	5	40

### 2-4-3. Procurement of Funds

As shown in Table 3-27, out of 102 studies for which funds had been procured (not including four studies in process for which funds were about to be procured), 28 (27.5%) were funded with Japanese ODA loans and 27 (26.5%) with Grant Aid. Consequently, the Japanese government has provided funding for 54 studies (52.9%). In 34 studies (33.3%), funds were provided by the recipient countries by themselves. This self-funding follows Japanese financial assistance as a significant source.

International organizations provided loans or grants for 11 studies (10.8%), with other donor agencies providing funds for seven studies (6.9%). In eight studies (7.8%), private sector funds were provided using the BOT (Build, Operate and Transfer) scheme.

The Japanese government has provided financial assistance for 66.7% of the funded studies in the “Completed” subcategory (six studies), 65.0% of the funded studies in the “Partially Completed” subcategory (13 studies), 38.0% in the “Under Implementation” subcategory (19 studies, one of which procured fund from both ODA loan and Grant Aid), and 69.6% in the “In Process” subcategory (16 studies).

Table 3-27 Details of Fund Procurement

Present Status	Type of Study	Japan's ODA Loan	Japan's Grant Aid	Japan's EXIM Bank	International Organizations	Other Donor countries	Own Fund	Private Fund	Others	Unknown	Total	*1	*2
												Total	Total
Completed	M/P+F/S	1	2	0	0	0	1	0	0	0	4	4	4
	F/S	0	3	0	0	0	2	0	0	0	5	5	6
	D/D	0	0	0	0	0	0	0	0	0	0	0	0
	Sub-Total	1	5	0	0	0	3	0	0	0	9	9	10
Partially Completed	M/P+F/S	0	6	0	0	1	4	1	0	0	12	9	9
	F/S	1	5	0	1	1	4	0	0	1	13	10	10
	D/D	1	0	0	0	0	0	0	0	0	1	1	1
	Sub-Total	2	11	0	1	2	8	1	0	1	26	20	20
Under Implementation	M/P+F/S	5	5	0	5	3	16	3	3	1	41	32	32
	F/S	2	4	0	2	0	3	1	0	3	15	13	13
	D/D	4	0	0	0	0	1	0	0	0	5	5	5
	Sub-Total	11	9	0	7	3	20	4	3	4	61	50	50
In Process	M/P+F/S	6	2	0	3	2	2	3	0	0	18	15	16
	F/S	1	0	0	0	0	0	0	0	0	1	1	3
	D/D	7	0	0	0	0	1	0	0	0	8	7	8
	Sub-Total	14	2	0	3	2	3	3	0	0	27	23	27
Total		28	27	0	11	7	34	8	3	5	123	102	107

\*1: Number of Development Studies which have funded project

\*2: Total number of Development Studies

\* Multiple categories may apply to some items. For this reason, totals may add up to more than 100%.

Table 3-28 shows the number of studies funded with Japanese assistance (loan and grant) by sectors. 28 studies were funded through ODA loans, and 27 studies were funded with Grant Aid. Of studies funded with ODA loans, 25 studies were in the social development area and three in the agriculture, forestry and fishery development area. Of studies funded with Grant Aid, 19 studies were in the social development area and eight studies in the agriculture, forestry and fishery development area.

Table 3-28 Number of Study Funded by Japanese Assistance by Sector

Sector	1997		1998		1999		2000		2001		2002		Total	
	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid	Japan's ODA Loan	Japan's Grant Aid
Planning & Administration	Development Plan	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
	Administration	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (14.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.6%)
	Sub-total	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (14.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.6%)
Public Works & Utilities	Public Utilities	0 (0.0%)	3 (23.1%)	1 (16.7%)	1 (12.5%)	1 (14.3%)	1 (25.0%)	2 (25.0%)	0 (0.0%)	1 (100.0%)	0 (0.0%)	1 (50.0%)	0 (0.0%)	6 (21.4%)
	Transportation	2 (50.0%)	4 (30.8%)	4 (66.7%)	3 (37.5%)	5 (71.4%)	1 (25.0%)	4 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (50.0%)	0 (0.0%)	16 (57.1%)
	Social Infrastructure	1 (25.0%)	0 (0.0%)	0 (0.0%)	2 (25.0%)	0 (0.0%)	2 (50.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (100.0%)	0 (0.0%)	0 (0.0%)	1 (3.6%)
	Communications & Broadcasting	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
	Sub-total	3 (75.0%)	7 (53.8%)	5 (83.3%)	6 (75.0%)	6 (85.7%)	4 (100.0%)	6 (75.0%)	0 (0.0%)	1 (100.0%)	2 (100.0%)	2 (100.0%)	0 (0.0%)	23 (82.1%)
	Commerce & Tourism	Commerce & Trade	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Tourism	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (12.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.6%)	
Sub-total	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (12.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.6%)	
Human Resources Development	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Health and Medical Care	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Social Welfare	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Agriculture, Forestry & Fishery	Agriculture	0 (0.0%)	5 (38.5%)	1 (16.7%)	1 (12.5%)	0 (0.0%)	0 (0.0%)	1 (12.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (7.1%)
	Animal Husbandry	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
	Forestry	1 (25.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.6%)	
	Fishery	0 (0.0%)	1 (7.7%)	0 (0.0%)	1 (12.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
	Sub-total	1 (25.0%)	6 (46.2%)	1 (16.7%)	2 (25.0%)	0 (0.0%)	0 (0.0%)	1 (12.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Others	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	
Total	4 (100.0%)	13 (100.0%)	6 (100.0%)	8 (100.0%)	7 (100.0%)	4 (100.0%)	8 (100.0%)	0 (0.0%)	1 (100.0%)	2 (100.0%)	2 (100.0%)	0 (0.0%)	28 (100.0%)	

The largest of the international organizations providing funds were the World Bank and the Asian Development Bank, which provided funds for three studies each. These are followed by European Union (two studies; European Investment Bank for one, and European Bank for Reconstruction and Development for one), Islamic Development Bank (one study), and others (three studies; UN for two, and Nordic Development Bank for one). After Japan, the next largest donor countries were France (three studies), which followed by the United States and Germany (one study each), and others (three studies) by Canada, Finland and South Korea (one study for each).

In order to realize the results of Development Studies carried out by the Japanese government, the recipient countries expect the Japanese government to provide financial assistance. Therefore, it could be concluded that Japanese financial assistance plays an important role in realizing the results of Development Studies.

Table 3-29 Details of Fund Source

Fund Source		Completed	Partially Completed	Under Implementation	In Process	Total
International Organizations *	WB	0	0	2	1	3
	ADB	0	0	3	0	3
	AfDB	0	0	0	0	0
	EU	0	0	0	2	2
	IDB	0	0	1	0	1
	IsDB	0	0	0	0	0
	Others	0	1	2	0	3
	Unknown	0	0	0	0	0
	Sub-Total	0	1	8	3	12
	Total **	0	1	7	3	11
Other Donor Countries *	U.S.A.	0	1	0	0	1
	U.K.	0	0	0	0	0
	France	0	1	2	0	3
	Germany	0	0	0	1	1
	Australia	0	0	0	0	0
	Netherlands	0	0	0	0	0
	Italy	0	0	0	0	0
	Spain	0	0	0	0	0
	Kuwait	0	0	0	0	0
	Saudi Arabia	0	0	0	0	0
	Others	0	1	1	1	3
	Unknown	0	0	0	0	0
	Sub-Total	0	3	3	2	8
Total **	0	2	3	2	7	

\* : Multiple categories may apply to some items.

\*\* : Number of Development Studies which have funded projects.

In 67 out of 102 funded studies (65.7%), as shown in Table 3-30, funds were procured within three years after the completion of Development Studies. The rest of the studies, except 28 studies for which the number of years elapsed is unknown, were funded within five years. By subcategory, 100.0% of “Completed” studies were funded within three years, and in “Partially Completed” studies, 60.0% were funded within three years, and 100.0% within five years, except six studies for which the number of years elapsed is unknown. The studies in “Under Implementation” were funded within four years and in “In Process” studies were funded within three years, except for the studies for which the number of years elapsed is unknown.,

**Table 3-30 Years Elapsed from the Completion of Development Studies to the Realization of Fund Procurement**

Present Status	Type of Study	Elapsed Years								Total
		Less than 1 Year	1 Year	2 Years	3 Years	4 Years	5 Years	More than 6 Years	Unknown	
Completed	M/P+F/S	0	1	2	1	0	0	0	0	4
	F/S	0	2	1	0	0	0	0	2	5
	D/D	0	0	0	0	0	0	0	0	0
	Sub-Total	0	3	3	1	0	0	0	2	9
Partially Completed	M/P+F/S	0	3	1	1	0	1	0	3	9
	F/S	1	3	1	1	1	0	0	3	10
	D/D	1	0	0	0	0	0	0	0	1
	Sub-Total	2	6	2	2	1	1	0	6	20
Under Implementation	M/P+F/S	9	4	2	3	3	0	0	11	32
	F/S	3	2	0	4	2	0	0	2	13
	D/D	4	0	0	0	0	0	0	1	5
	Sub-Total	16	6	2	7	5	0	0	14	50
In Process	M/P+F/S	2	3	2	2	0	0	0	6	15
	F/S	0	0	1	0	0	0	0	0	1
	D/D	6	1	0	0	0	0	0	0	7
	Sub-Total	8	4	3	2	0	0	0	6	23
Total		26	19	10	12	6	1	0	28	102

#### 2-4-4. Factors for Implementation

Important factors in procuring funds or implementing the proposed project are: 1) impacts of the project, 2) priority, 3) consistency with national development plans and 4) urgency. Proposed projects whose impacts are effective are apt to be materialized.

#### 2-4-5. Perspectives of Studies "Completed or In Progress"

Table 3-31 shows perspectives of the studies for which projects are as yet unimplemented, 17 of which are classified as "Partially Completed" studies and 36 of which are classified as "Under Implementation" studies. In 12 of the "Partially Completed" studies, formal requests/ subsequent actions are being carried out or are under preparation. In 11 of these studies, attempts are being made to secure funding. In 28 of the "Under Implementation" studies, formal requests / subsequent actions are being carried out or are under preparation. In 24 of these studies, attempts are being made to secure funding.

Procurement of funding has been concluded in 23 of 27 "In Process" studies, with procurement of funds planned for the other four. There are only six "In Process" studies for which formal requests / subsequent actions have been already carried out. This is because procurement of funding for the "In Process" studies has been concluded, and implementation is awaited. The content of six "In Process" studies has to do with procuring funds.

Table 3-31 Perspectives of "Partially Completed" or "Implementing" Studies of F/S Group

	Partially Completed	Under Implementation	Total
Formal requests/subsequent actions have been decided.	10	23	33
Formal requests/subsequent actions are under preparation.	2	5	7
Total	12	28	40
Subsequent Studies	1	3	4
Fund Procurement	11	24	35
Japan's Technical Cooperation	0	4	4
Others	0	2	2
Total	12	33	45
Formal requests/subsequent actions have not been confirmed.	5	8	13
Number of Development Studies	17	36	53
Total Number of Development Studies	20	50	70

\* Multiple categories may apply to some items



## 2-5. Status of Studies at “Under Promotion”

### 2-5-1. Details of Studies at “Under Promotion”

101 studies have been classified as “Under Promotion”. Some of the studies are in process to be materialized, as this takes several years after they have been completed. However, 13 studies “Under Promotion” are still in preparation, despite the fact that more than six years have passed since they were completed.

In 88 studies “Under Promotion”(87.1% of the total), a period of less than five years has elapsed.

A period less than five years has passed in 23 (79.3%) F/S studies in the “Under Promotion” subcategory. On the other hand, a period of less than five years has passed in 63 (90.0%) of M/P + F/S studies in the “Under Promotion” subcategory. F/S exceeds in number of the studies which elapse of time after its completion are more than 6 years. Due to the nature of D/D studies, extremely few studies are classified as being in the “Under Promotion” subcategory. Over the last six years, only two D/D studies have been classified as “Under Promotion,” and within three years after the completion.

Except for the studies for which the dates of fund procurement are unknown, “Completed” studies have been funded within three years, “Partially Completed” studies within four years, except for one study, studies “Under Implementation” within four years, studies “In Process” within three years after the completion of studies. It could be concluded that it is necessary to materialize the Development Studies as soon as the studies complete.

Table 3-32 Years Elapsed After the Completion of Development Studies

Elapsed Years	M/P+F/S	F/S	D/D	Total
1 Year	16 (22.9%)	5 (17.2%)	0 (0.0%)	21
2 Years	15 (21.4%)	2 (6.9%)	0 (0.0%)	17
3 Years	10 (14.3%)	4 (13.8%)	2 (100.0%)	16
4 Years	11 (15.7%)	9 (31.0%)	0 (0.0%)	20
5 Years	11 (15.7%)	3 (10.3%)	0 (0.0%)	14
6 Years	7 (10.0%)	6 (20.7%)	0 (0.0%)	13
Total	70 (100.0%)	29 (100.0%)	2 (100.0%)	101

In five in F/S, and 12 in M/P out of 101 studies “Under Promotion” (16.8%), some sort of subsequent studies have already been conducted. These subsequent studies consist of three B/D, four D/D, two review studies, and seven other studies.

In all the studies “Under Promotion”, except for four studies for which the implementation dates of subsequent studies are unknown, the subsequent studies have been conducted within four years after the completion of the Development Studies.

Table 3-33 Details of Subsequent Studies Conducted (Studies "Under Promotion")

Details	M/P+F/S	F/S	D/D	Total
F/S	0	0	0	0
B/D	3	0	0	3
D/D	1	1	0	2
D/D (Grant)	0	0	0	0
JICA/JBIC D/D	1	1	0	2
E/S	0	0	0	0
Review Study	1	1	0	2
Others	6	1	0	7
Unknown	0	1	0	1
Total	12	5	0	17
Total Number of “Under Promotion” Studies	70	29	2	101

\* Multiple categories may apply to some items.

As shown in Table 3-34, requests for financial assistance and / or subsequent actions have already been made in 81 studies classified as “Under Promotion” (80.2% of the total). In 16 studies (15.8%), formal requests and / or subsequent actions are under preparation or examination. This means that subsequent actions have been taken in more than 90% of the studies.

Out of 97 studies whose subsequent actions have been decided or are in preparation, implementation of subsequent studies has been scheduled for 18 studies, and procurement of funds has been scheduled for 74 studies.

Table 3-34 Details of Studies "Under Promotion"

Details	M/P+F/S	F/S	D/D	Total
Formal requests/subsequent actions have been decided.	57	22	2	81
Formal requests/subsequent actions are under preparation.	11	5	0	16
Total	68	27	2	97
Subsequent Studies	14	4	0	18
Fund Procurement	49	23	2	74
Japan's Technical Cooperation	11	1	0	12
Others	11	1	0	12
Total	85	29	2	116
Formal requests/subsequent actions have not been confirmed.	2	2	0	4
Total Number of "Promoting" Studies	70	29	2	101

\* Multiple categories may apply to some items.

#### 2-5-2. Details of Studies "Under Promotion" for which Requests & Subsequent Procedures Have Been Decided

There are 81 studies whose actions for materialization have been decided upon as follows. Multiple categories may apply to some items.

- (1) Request for financial assistance: 64 studies
- (2) Request for implementation of subsequent studies: 17 studies
- (3) Request for Japan's technical cooperation: 11 studies
- (4) Others: 6 studies

The requests for financial assistance consist of 22 for Japanese ODA loans, 29 for Japanese Grant Aid, and tow for both Japanese ODA loans and Grant Aid. In short, the Japan government is asked for financial assistance in 76.6% of studies under preparation of fund procurement.

Materialization of Development Studies have been realized or decided in 75.9% of F/S studies (22 studies), 81.4% of M/P + F/S studies (57 studies) and 100.0% of D/D studies (two studies).

Table 3-35 Details of Materialization

	M/P+F/S	F/S	D/D	Total
Subsequent Studies	14	3	0	17
Fund Procurement	42	20	2	64
Japan's Technical Cooperation	10	1	0	11
Others	6	0	0	6
Total	72	24	2	98
Total Number of studies	57	22	2	81
Total Number of "Promoting" Studies	70	29	2	101

\* Multiple categories may apply to some items.

As shown in Table 3-36, in 81 studies whose actions for materialization have been decided upon, the formal requests were made and concrete actions were taken within five years after the completion of Development Studies in all the studies except for unknown cases and two M/P+F/S studies.

Table 3-36 Years Elapsed from Completion of Development Studies to Determination of the Formal Request/Concrete Actions

Elapsed Years	M/P+F/S	F/S	D/D	Total
Less than 1 Year	28	11	0	39
1 Year	12	5	1	18
2 Years	4	2	0	6
3 Years	0	0	0	0
4 Years	0	1	0	1
5 Years	1	0	0	1
More than 6 Years	2	0	0	2
Unknown	10	3	1	14
Total	57	22	2	81

### 2-5-3. Perspectives on Studies “Under Promotion” Whose Actions for Materialization are Under Examination

There are 16 studies whose actions for their materialization are under preparation and examination. Although multiple items may apply to one study, perspectives are as follows.

- (1) Studies under examination for implementation of subsequent studies: one study
- (2) Studies for which requests for financial assistance are under preparation: 10 studies
- (3) Studies for which requests for Japan’s technical cooperation are under examination: one study
- (4) Others: six studies

The requests for financial assistance consist of five in which the financial assistance sought is in the form of Japanese ODA loans, two for Japanese Grant Aid and one for both Japanese ODA loans and Japanese Grant Aid. Requests for Japanese financial assistance account for 60.0% of the overall requests.

Materialization of Development Studies are under preparation or examination in 17.2% of F/S studies (five studies), 15.7% of M/P + F/S studies (11 studies).

**Table 3-37 Details of Formal Request/Subsequent Actions which are under Preparation**

Details	M/P+F/S	F/S	D/D	Total
Subsequent Studies	0	1	0	1
Fund Procurement	7	3	0	10
Japan’s Technical Cooperation	1	0	0	1
Others	5	1	0	6
Total	13	5	0	18
Total Number of Development Studies	11	5	0	16
Total Number of “Under Promotion” Studies	70	29	2	101

\* Multiple categories may apply to some items.

#### 2-5-4. Factors Impeding Procedures for Materialization of Studies “Under Promotion”

In four studies, no actions for materialization have been taken. Major reasons behind include economic factors, difficulties in procuring funds from abroad, and a low feasibility rate of projects. In other cases, no adequate information is available due to little time having passed following completion of the studies.

Table 3-38 Impeding Factors

Factor	M/P+F/S	F/S	D/D	Total
Difficulty in Fund Procurement from Foreign Countries	0	1	0	1
Political Factor	0	0	0	0
Economic Factor	1	0	0	1
Policy-Related Factor	0	0	0	0
Administrative Factor	0	0	0	0
Lack/Decline of Feasibility	0	1	0	1
Inappropriate Project Scale	0	0	0	0
Postponement of Related Project	0	0	0	0
Poor Security	0	0	0	0
Natural Disaster	0	0	0	0
Others	1	0	0	1
Unknown	0	0	0	0
Total	2	2	0	4

#### 2-5-5. Perspectives on Studies “Under Promotion”

As mentioned above, there are 81 studies in which actions for their materialization have been decided. It is expected that these studies will be raised to “Under Implementation” status by realization of fund procurement and/or implementation of subsequent studies. On the other hand, actions for materialization have been under preparation or examination in 16 studies. It is expected that any actions for materialization would be taken in these studies. However, in two of the former studies and two out of the latter, more than six years have already passed after the completion of the studies. In nearly all the studies in the “Completed”, “Partially Completed”, and “Under Implementation” subcategories, funds were procured within five years after completion of Development Studies. Thus, without any supplemental studies to promote realization of Development Studies, studies “Under Promotion” for which more than six years has passed after completion of the study might be reclassified as “Delayed” or “Suspended”.

2-6. Status of Studies “Delayed or Suspended” or “Discontinued or Cancelled”

There are ten studies (out of 219) which are categorized as “Delayed or Suspended” with a rate of only 4.6% of that for F/S studies. Additionally there is one “Discontinued or Cancelled” study, with a rate of 0.5%.

- 1) Six out of 138 M/P +F/S studies are categorized as “Delayed or Suspended”, and one is as “Discontinued or Cancelled”. These seven studies account for 5.1% of the total.
- 2) Four out of 65 F/S studies are categorized as “Delayed or Suspended”. None of them is categorized as “Discontinued or Cancelled”. These four account for 6.2% of the total.
- 3) None of the D/D studies, out of 16, is categorized as “Delayed or Suspended” or “Discontinued or Cancelled”.

2-6-1. Details of Studies “Delayed or Suspended” or “Discontinued or Cancelled”

A number of projects with short duration have been categorized as “Delayed or Suspended” as a tentative classification due to a lack of information on projects status. Therefore, projects within one year after the completion of the studies are made up of a majority of “Delayed or Suspended” category.

Table 3-39 Years Elapsed after Completion of Development Studies

Elapsed Years	Delayed or Suspended				Discontinued or Cancelled				Total
	M/P+ F/S	F/S	D/D	Sub-Total	M/P+ F/S	F/S	D/D	Sub-Total	
1 Year	3	1	0	4	0	0	0	0	4
2 Years	1	0	0	1	0	0	0	0	1
3 Years	0	1	0	1	0	0	0	0	1
4 Years	0	1	0	1	0	0	0	0	1
5 Years	1	0	0	1	1	0	0	1	2
6 Years	1	1	0	2	0	0	0	0	2
Total	6	4	0	10	1	0	0	1	11

It was confirmed that, in ten "Delayed or Suspended" studies, there was no study for which the subsequent studies have been conducted. Moreover, after the completion of these Development Studies, there was only one project for which a formal request for fund procurement was made to realize a project. The request was made for Japanese Grant Aid.

Table 3-40 Status of Formal request for the subsequent actions

Details	Delayed or Suspended				Discontinued or Cancelled				Total
	M/P+ F/S	F/S	D/D	Sub- Total	M/P+ F/S	F/S	D/D	Sub- Total	
Formally Requested	0	1	0	1	0	0	0	0	1
No Formal Request	6	3	0	9	1	0	0	1	10
Total Number of Development Studies	6	4	0	10	1	0	0	1	11

#### 2-6-2. Factors Causing Delay, Suspension, Discontinuation or Cancellation

There are ten studies classified as "Delayed or Suspended". Probable reasons why these studies failed to be materialized are as follows.

- Policy-related reasons such as decrease in priority in the national development plan and changes in national development policies.
- Economic reasons such as worsening economic conditions in the recipient country;
- Administrative reasons such as poor coordination among government agencies and improper implementation systems;
- Lack of adequate information available to make an assessment of projects situation due to little time having passed following completion of the studies,

Political continuity is essential in materializing Development Studies. In developing countries, however, development policy often changes with a change in the regime. Moreover, many developing countries promote national development based on their five-year plans. In the studies in which more than five years have passed after their completion, the possibility of materializing Development Studies might deteriorate unless countermeasures are taken.



**Table 3-41 Factors Causing Studies to be "Delayed or Suspended" and "Discontinued or Cancelled"**

Factors	Delayed or Suspended				Discontinued or Cancelled				Total
	M/P+ F/S	F/S	D/D	Sub- Total	M/P+ F/S	F/S	D/D	Sub- Total	
Difficulty in Fund Procurement from Foreign Countries	0	2	0	2	0	0	0	0	2
Political Factor	1	0	0	1	0	0	0	0	1
Economic Factor	0	1	0	1	1	0	0	1	2
Policy-Related Factor	1	0	0	1	1	0	0	1	2
Administrative Factor	0	0	0	0	1	0	0	1	1
Lack/Decline of Feasibility	1	0	0	1	0	0	0	0	1
Inappropriate Project Scale	1	0	0	1	0	0	0	0	1
Postponement of Related Project	0	0	0	0	0	0	0	0	0
Poor Security	0	2	0	2	0	0	0	0	2
Natural Disaster	0	0	0	0	0	0	0	0	0
Others	1	1	0	2	0	0	0	0	2
Unknown	2	1	0	3	0	0	0	0	3
Total	7	7	0	14	3	0	0	3	17
Total Number of Development Studies	6	4	0	10	1	0	0	1	11

\* Multiple categories may apply to some items.

### 2-6-3. Perspectives

Formal requests / concrete actions have already been decided and under preparation for two of ten "Delayed or Suspended" studies; and were undecided or unknown for eight studies.

As for the details of the formal request or subsequent action for the two studies that have already decided or are under consideration / preparation, fund procurement was the action taken for two studies.

Table 3-42 Perspective of "Delayed or Suspended" Studies of F/S Studies

Future Prospect	M/P+F/S	F/S	D/D	Total
Formal requests/concrete actions have been decided.	0	0	0	0
Formal requests/concrete actions are under preparation.	1	1	0	2
Total	1	1	0	2
Subsequent Studies	0	0	0	0
Fund Procurement	1	1	0	2
Japan's Technical Cooperation	0	0	0	0
Others	0	0	0	0
Total	1	1	0	2
Formal requests/concrete actions are unknown.	5	3	0	8
Total Number of Development Studies	6	4	0	10

As mentioned above, formal requests or concrete actions have not been decided in 80% of the "Delayed or Suspended" studies. As a means of visualizing trends in materialization, Table 3-43 indicates changes in status of the studies categorized as "Delayed or Suspended" in FY 2002.

As for the study types, four out of nine "Delayed or Suspended" studies in FY 2000 are categorized as "Completed or In Progress," with four studies categorized as "Under Promotion" in the M/P + F/S studies. In the F/S studies, two out of five "Delayed or Suspended" studies in FY 2002 are categorized as "Under Promotion." It has been confirmed that action for materialization of the studies categorized "Delayed or Suspended" in FY 2002 may be taken.

As for the number of years elapsed, four out of 14 studies were categorized as "Completed or In Progress" and eight as "Under Promotion" with two years after completion of the studies.

Concerning the projects with short duration after the study, it would be difficult for the recipient governments to take concrete actions toward projects realization based on constructive strategies. It would take several years to develop these projects into realization.

Having said that, as for the projects with more than five-year duration, concrete

actions should be taken in order to clarify the factors impedeing materialization of the studies. Otherwise, such studies would be classified as “Discontinued or Cancelled”.

Table 3-43 Present Status of Studies Categorized as “Delayed or Suspended” in FY 2002

Study Type	Present Status	Number of Present Status (FY2002)	Number of Present Status (FY2003)					
			Total	Completion Year				
				1997	1998	1999	2000	2001
M/P+F/S	Completed	0	0	0	0	0	0	0
	Partially Completed	0	0	0	0	0	0	0
	In Progress	0	0	0	0	0	0	0
	Processing	0	0	0	0	0	0	0
	Promoting	0	1	1	0	0	0	0
	Delayed or Suspended	3	2	0	1	0	0	1
	Discontinued or Cancelled	0	0	0	0	0	0	0
F/S	Completed	0	0	0	0	0	0	0
	Partially Completed	0	0	0	0	0	0	0
	In Progress	0	0	0	0	0	0	0
	Processing	0	0	0	0	0	0	0
	Promoting	0	2	0	0	1	0	1
	Delayed or Suspended	5	3	0	1	0	1	1
	Discontinued or Cancelled	0	0	0	0	0	0	0
Total		8	8	1	2	1	1	3

Table 3-44 Details of Fund Procurement for F/S Group (Social and Agricultural Development Sectors)

Region	Asia																		Total (Asia)					
	ASEAN									Others														
	Cambodia	Indonesia	Laos	Malaysia	Philippines	Thailand	Viet Nam	Sub-Total (ASEAN)	China	Mongolia	Bangladesh	Bhutan	India	Maldives	Nepal	Pakistan	Sri Lanka	Azerbaijan		Kazakhstan	Uzbekistan	East Timor	Sub-Total (Others)	
	1	1	0	0	5	1	7	15	2	0	1	0	0	0	0	0	0	5	0	0	0	0	8	23
	3	0	0	0	1	0	1	5	0	2	0	1	0	0	0	0	1	0	0	0	0	0	4	9
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	1	1	1	0	0	0	1	4	1	0	0	0	0	0	0	0	0	0	0	1	0	2	4	8
	0	1	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	2
	1	0	1	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	3
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	1	1	1	0	0	0	1	4	1	0	0	0	0	0	0	0	0	0	0	1	0	3	5	9
Sub-Total	0	0	1	0	1	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
Other Donor Countries	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
U.S.A.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
U.K.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
France	0	0	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Germany	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Australia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Netherlands	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Italy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Spain	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kuwait	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Saudi Arabia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	1	0	1	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
Own Fund	0	2	0	3	0	1	1	7	6	2	1	0	0	0	0	0	0	1	0	0	0	0	10	17
Private Fund	0	1	0	0	1	0	1	3	0	0	0	0	1	0	0	0	0	0	0	0	0	0	1	4
Others	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	2	2
Unknown	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1	2
Total	5	5	2	3	8	2	12	37	9	5	3	1	1	0	0	1	7	0	1	0	2	30	67	
Number of Development Studies	4	4	1	3	6	2	11	31	7	4	3	1	1	0	0	1	5	0	1	0	2	25	56	
Conclusion (Certain)	0	1	0	0	2	0	0	3	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	4
Rate of Realization	50.0%	29.4%	66.7%	60.0%	50.0%	33.3%	64.7%	48.6%	87.5%	57.1%	60.0%	100.0	25.0%	0.0%	0.0%	33.3%	75.0%	0.0%	33.3%	0.0%	100.0	54.2%	50.8%	
Completed or In Progress	4	5	2	3	8	2	11	35	7	4	3	1	1	0	0	1	6	0	1	0	2	26	61	
Total Number of Development Studies	8	17	3	5	16	6	17	72	8	7	5	1	4	1	4	3	8	1	3	1	2	48	120	

Region	Middle East										Total (Middle East)	
	Egypt	Iran	Jordan	Lebanon	Morocco	Palestine	Syria	Tunisia	Turkey			
Country												
Japan's ODA	0	0	1	0	0	0	0	1	0	0	0	2
Japan's Grant Aid	0	0	0	0	1	1	2	0	0	0	0	4
Export and Import Bank of Japan	0	0	0	0	0	0	0	0	0	0	0	0
International Organizations	0	0	0	0	0	0	0	0	0	0	0	0
World Bank	0	0	0	0	0	0	0	0	0	0	0	0
ADB	0	0	0	0	0	0	0	0	0	0	0	0
AfDB	0	0	0	0	0	0	0	0	0	0	0	0
EU	0	0	0	0	0	0	0	0	0	0	0	0
IDB	0	0	0	0	0	0	0	0	0	0	0	0
IsDB	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	0	0	0	0	0	0	0
Other Donor Countries	0	0	0	0	0	0	0	0	0	0	0	0
U.S.A.	0	0	0	0	0	0	0	0	0	0	0	0
U.K.	0	0	0	0	0	0	0	0	0	0	0	0
France	0	0	0	0	0	0	0	0	0	0	0	0
Germany	0	0	0	0	0	0	0	0	0	0	0	0
Australia	0	0	0	0	0	0	0	0	0	0	0	0
Netherlands	0	0	0	0	0	0	0	0	0	0	0	0
Italy	0	0	0	0	0	0	0	0	0	0	0	0
Spain	0	0	0	0	0	0	0	0	0	0	0	0
Kuwait	0	0	0	0	0	0	0	0	0	0	0	0
Saudi Arabia	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	0	0	0	0	0	0	0
Own Fund	1	0	0	0	0	0	5	0	3	0	0	9
Private Fund	1	0	0	0	0	0	0	0	1	0	0	2
Others	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	1	0	0	0	0	0	0	0	0	0	1
Total	2	1	1	0	1	1	7	1	4	1	4	18
Number of Development Studies	1	1	1	0	1	1	5	1	4	1	4	15
Conclusion (Certain)	0	0	0	0	0	0	0	0	0	0	0	0
Rate of Realization Completed or In Progress	16.7%	50.0%	100.0%	0.0%	100.0%	100.0%	83.3%	100.0%	100.0%	100.0%	100.0%	65.2%
Total Number of Development Studies	6	2	1	1	1	1	6	1	4	1	4	23

Region	Africa													Total (Africa)		
Country	Central African Republic	Cote d'Ivoire	Eritrea	Ethiopia	Ghana	Kenya	Madagascar	Mauritania	Malawi	Niger	Senegal	Tanzania	Uganda	Zambia	Zimbabwe	Total
Japan's ODA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Japan's Grant Aid	0	0	0	0	1	2	0	1	1	0	1	3	1	0	0	10
Export and Import Bank of Japan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
International Organizations	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
World Bank	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ADB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AfDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
EU	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
IDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
IsDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	1	0	0	0	0	1	0	0	0	0	2
Other Donor Countries	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
U.S.A.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
U.K.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
France	0	0	0	0	0	1	0	0	0	0	1	0	0	0	0	2
Germany	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Australia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Netherlands	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Italy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Spain	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kuwait	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Saudi Arabia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	1	0	0	0	0	1	0	0	0	0	2
Own Fund	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1
Private Fund	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	1
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
Total	0	0	0	0	3	3	1	1	1	0	2	3	1	0	0	15
Number of Development Studies	0	0	0	0	2	3	1	1	1	0	1	3	1	0	0	13
Conclusion (Certain)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rate of Realization	0.0%	0.0%	0.0%	0.0%	66.7%	75.0%	100.0%	50.0%	100.0%	0.0%	100.0%	60.0%	100.0%	0.0%	0.0%	48.1%
Completed or In Progress	0	0	0	0	2	3	1	1	1	0	1	3	1	0	0	13
Total Number of Development Studies	1	2	1	2	3	4	1	2	1	1	5	1	1	1	1	27

Region	Central & South America																
Country	Bolivia	Brazil	Chile	Colombia	Costa Rica	Dominican Republic	Grenada	Guatemala	Honduras	Mexico	Nicaragua	Panama	Peru	Paraguay	El Salvador	Bolivian Republic of Venezuela	Total (Central & South America)
Japan's ODA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
Japan's Grant Aid	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	2
Export and Import Bank of Japan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
International Organizations	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
World Bank	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
ADB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
AfDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
EU	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
IDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
IsDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other Donor Countries	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	2
U.S.A.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
U.K.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
France	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Germany	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Australia	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
Netherlands	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Italy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Spain	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kuwait	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Saudi Arabia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	2
Own Fund	1	0	0	1	0	0	0	0	0	1	0	1	0	0	0	0	4
Private Fund	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	1
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	2	0	0	1	0	0	1	0	0	1	0	2	1	0	2	1	11
Number of Development Studies	1	0	0	1	0	0	1	0	0	1	0	1	1	0	2	1	9
Conclusion (Certain)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rate of Realization Completed or In Progress	33.3%	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%	0.0%	0.0%	50.0%	0.0%	50.0%	100.0%	0.0%	66.7%	50.0%	30.0%
Total Number of Development Studies	3	3	1	1	2	2	1	1	2	2	3	2	1	1	3	2	30

Region	Oceania				Europe								Plural Countries	Total (Region)							
	Republic of the Fiji Islands	Papua New Guinea	Samoa	Total (Oceania)	Albania	Bulgaria	Bosnia-Herzegovina	Hungary	Romania	Croatia	Lithuania	Moldova		Total (Europe)	Asia	Middle East	Africa	Central & South America	Oceania	Europe	Plural Countries
Japan's ODA	0	0	0	0	0	0	0	0	0	0	0	0	0	23	2	0	2	0	0	1	28
Japan's Grant Aid	0	0	1	1	0	0	0	0	0	0	0	0	0	9	4	10	2	1	0	1	27
Export and Import Bank of Japan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
International Organizations	0	0	0	0	0	1	0	0	0	1	1	3	0	8	0	0	0	0	0	0	11
World Bank	0	0	0	0	0	0	0	0	0	0	1	1	0	2	0	0	0	0	0	0	3
ADB	0	0	0	0	0	0	0	0	0	0	0	0	0	3	0	0	0	0	0	0	3
AFDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
EU	0	0	0	0	0	1	0	0	0	0	0	1	0	1	0	0	0	0	0	0	2
IDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1
IsDB	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	1	0	1	0	2	0	0	0	0	0	0	3
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	1	0	0	0	1	1	3	0	9	0	0	0	0	0	0	12
Other Donor Countries	0	0	0	0	0	0	0	0	0	1	0	1	0	2	0	2	2	0	1	0	7
U.S.A.	0	0	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0	0	0	1
U.K.	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
France	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Germany	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	2	0	0	0	0	3
Australia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
Netherlands	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Italy	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Spain	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Kuwait	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Saudi Arabia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	1	0	1	0	1	0	0	1	0	0	0	3
Unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sub-Total	0	0	0	0	0	0	0	0	0	2	0	2	0	17	9	1	4	0	2	1	34
Own Fund	0	0	0	0	0	0	0	0	0	0	0	0	0	4	2	1	1	0	0	0	8
Private Fund	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	0	2
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	1	2	0	0	0	0	1	3
Unknown	0	0	0	0	0	1	0	0	0	0	0	0	0	2	1	1	0	0	1	0	5
Total	0	0	1	1	0	3	0	0	1	0	2	1	7	67	18	15	11	11	7	4	123
Number of Development Studies	0	0	1	1	0	2	0	0	1	0	1	5	3	56	15	13	9	1	5	3	102
Conclusion (Certain)	0	0	0	0	0	0	0	0	0	0	0	0	0	4	0	0	0	0	0	0	4
Rate of Realization	0.0%	0.0%	100.0%	33.3%	0.0%	100.0%	0.0%	0.0%	25.0%	0.0%	100.0%	100.0%	41.7%	50.8%	65.2%	48.1%	30.0%	33.3%	41.7%	75.0%	48.9%
Completed or In Progress	0	0	1	1	0	2	0	0	1	0	1	5	3	61	15	13	9	1	5	3	107
Total Number of Development Studies	1	1	1	3	1	2	1	1	4	1	1	12	4	120	23	27	30	3	12	4	219

Concluded





## CHAPTER 4

### AN OVERVIEW OF DEVELOPMENT STUDIES

(Mining and Industrial Development Area:  
Studies Completed in FY1974-FY2002)

## CHAPTER 4. An Overview of Development Studies

(Mining and Industrial Development Areas: Studies Completed in FY 1974 – FY 2002)

599 out of 1,976 total studies in total in the mining and industry area (excluding basic resource Development Studies implemented under contract by metal industry teams) are analyzed in this chapter.

### 1. Premise of Analysis

In this chapter, the completed Development Studies in the mining and industrial development area are categorized into the following two types for the purposes of analyzing the status of these studies.

- (1) M/P Studies Group (M/P Studies, Resource Studies, Chinese Factories)
- (2) F/S Studies Group (F/S, ASEAN Plant Renovation Studies, and (F/S-type) Other Studies)

The status is classified in the same manner as in Chapter 3.

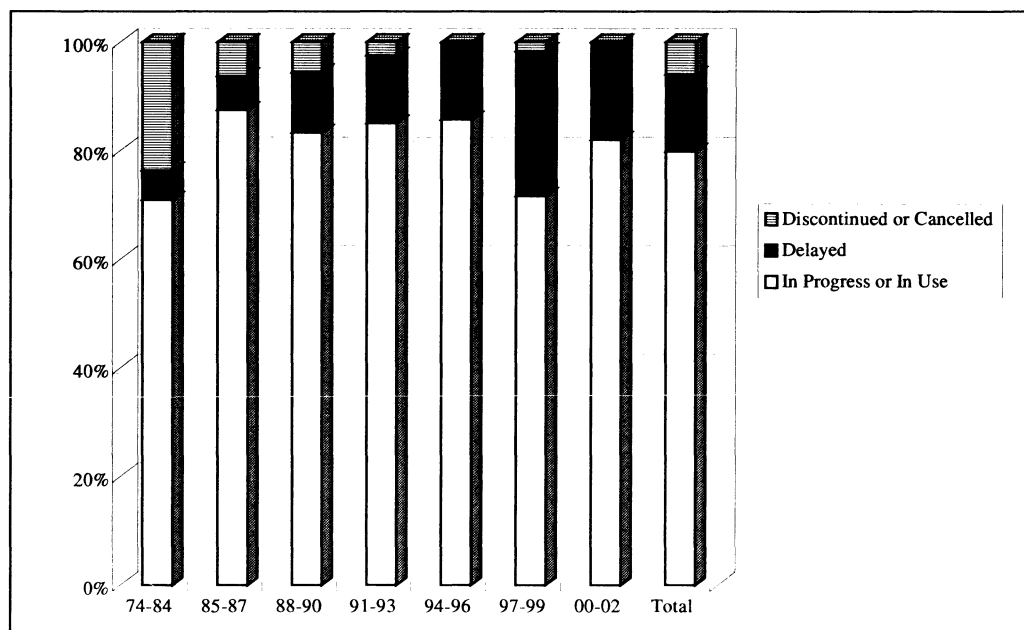
## 2. Status of Completed Studies in the M/P Studies Group

There were 318 studies completed from FY 1974 to FY 2002 in the M/P Studies Group. Out of these studies, 254 studies are classified as “In Progress or In Use,” 45 are “Delayed,” and 19 are “Discontinued or Cancelled.” As is shown in the table 4-1, the utilization rate for studies was observed at around mid 80% between FY 1985 and FY 1996, while the rate has fallen to 71.7% between FY 1997 and FY 1999. It can be assumed that this decline in the utilization rate is one of the adverse effects of the economic crisis occurred around the time. Moreover, there is a shortage of information on project status for the studies completed in recent years. As a tentative classification, those studies have been categorized as “Delayed”. As a result, relatively large numbers of studies are categorized in “Delayed” group.

Table 4-1 Present Status of the M/P Studies Group by Study Completion Year

	74-84	85-87	88-90	91-93	94-96	97-99	00-02	Total
In Progress or In Use	39 (70.9%)	28 (87.5%)	30 (83.3%)	34 (85.0%)	48 (85.7%)	43 (71.7%)	32 (82.1%)	254 (79.9%)
Delayed	3 (5.5%)	2 (6.3%)	4 (11.1%)	5 (12.5%)	8 (14.3%)	16 (26.7%)	7 (17.9%)	45 (14.2%)
Discontinued or Cancelled	13 (23.6%)	2 (6.3%)	2 (5.6%)	1 (2.5%)	0 (0.0%)	1 (1.7%)	0 (0.0%)	19 (6.0%)
Total	55 (100.0%)	32 (100.0%)	36 (100.0%)	40 (100.0%)	56 (100.0%)	60 (100.0%)	39 (100.0%)	318 (100.0%)

Figure 4-1 Present Status of the M/P Studies Group by Study Completion Year



## 2-1. Status of Completed Studies by Region

70 out of 77 completed studies in the M/P Studies Group in ASEAN countries are classified as "In Progress and In Use," with a utilization rate of 90.9%. In Asia (except ASEAN), 112 out of 140 studies are "In Progress and In Use," with a utilization rate of 80.0%. The utilization rate for the Middle East is quite high, 85.2%, although only 27 studies were carried out. On the other hand, the utilization rate for Central and South America is a relatively low 70.3%. For Africa, it is 55.6%, which is rather low in comparison with the overall average of 79.9%. Having said that, it is difficult to evaluate the rate in Africa appropriately, since no studies in the M/P Studies Group were conducted between FY 1983 and FY 1990, and only 18 studies implemented are the source of evaluation.

Table 4-2 Present Status of the M/P Studies Group by Region

	ASEAN	Asia (except ASEAN)	Middle East	Africa	Central & South America	Oceania	Europe	Middle Asia	Total
In Progress or In Use	70 (90.9%)	112 (80.0%)	23 (85.2%)	10 (55.6%)	26 (70.3%)	1 (33.3%)	8 (88.9%)	4 (57.1%)	254 (79.9%)
Delayed	3 (3.9%)	23 (16.4%)	3 (11.1%)	5 (27.8%)	6 (16.2%)	1 (33.3%)	1 (11.1%)	3 (42.9%)	45 (14.2%)
Discontinued or Cancelled	4 (5.2%)	5 (3.6%)	1 (3.7%)	3 (16.7%)	5 (13.5%)	1 (33.3%)	0 (0.0%)	0 (0.0%)	19 (6.0%)
<b>Total</b>	<b>77</b> (100.0%)	<b>140</b> (100.0%)	<b>27</b> (100.0%)	<b>18</b> (100.0%)	<b>37</b> (100.0%)	<b>3</b> (100.0%)	<b>9</b> (100.0%)	<b>7</b> (100.0%)	<b>318</b> (100.0%)

The utilization rate in Africa is significantly low in the 1970's and many studies are categorized in "Delayed" or "Discontinued or Cancelled" status. Most of these are related to industrialization in the 1970's and 80's. The reason for this very low utilization rate in Africa attributes to severe economic conditions. In some African countries, increased imports of capital goods and raw materials for substitute industries resulted in burden of debt accumulation. The World Bank, in response to the situation, set severe conditions for such investments and as a result, recipient governments in Africa suffered from a constant shortage of funds for development and new investment without flexibility in creating policies within limited government budgets.

## 2-2. Status of Completed Studies by Study Type

M/P Studies and the Factories Modernization Program in China exhibit high utilization rate at around 80%. Out of 172 completed studies of M/P type, 141 have been utilized effectively with a rate of 82.0%. Regarding the Factories Modernization Program in China, 95 out of 117 studies have been utilized. One of the reasons for the high utilization rate in Chinese Factories Studies is appropriate arrangements coordinated by the recipient agencies such as local governments and targeted firms. Since these agencies regarded the findings of studies and suggestions made as highly important, they endeavored to arrange their policies in order to adopt the findings of studies.

With regard to the Resource Studies, nine out of 15 studies are classified as "In Progress or In Use", and the utilization rate here is 60.0%. Concerning the other studies, nine out of 14 studies are "In Progress or In Use," with a utilization rate of 64.3%, which is slightly low.

Table 4-3 Present Status of the M/P Studies Group by Type of Study

	M/P	Resources Studies	Chinese Factories	Others	Total
In Progress or In Use	141 (82.0%)	9 (60.0%)	95 (81.2%)	9 (64.3%)	254 (79.9%)
Delayed	21 (12.2%)	3 (20.0%)	19 (16.2%)	2 (14.3%)	45 (14.2%)
Discontinued or Cancelled	10 (5.8%)	3 (20.0%)	3 (2.6%)	3 (21.4%)	19 (6.0%)
<b>Total</b>	<b>172</b> <b>(100.0%)</b>	<b>15</b> <b>(100.0%)</b>	<b>117</b> <b>(100.0%)</b>	<b>14</b> <b>(100.0%)</b>	<b>318</b> <b>(100.0%)</b>

### 2-3. Status of Completed Studies by Sector

The utilization rate for the industry sector is 79.9% (163 studies out of 204 studies in total). The utilization rate for the energy sector is 76.4% (55 studies out of 72 studies in total), slightly lower than that for the industry sector. In the mining sector, nine studies are categorized as "In Progress or In Use," one as "Delayed or Suspended," and one as "Discontinued or Cancelled" out of 11 studies.

Although the number of studies must be taken into account to analyze status, the utilization rates for the thermal power generation sub-sector in the energy sector is 100.0%, the highest rate among all. Conversely, the utilization rate for the hydroelectric power generation sub-sector is 25.0%, which is the lowest. Utilization rates in all sub-sectors in the industry sector are relatively high; 100% for the ceramic industry sub-sector, 87.5% for industry in general, 79.7% for machine industry, and 76.5% for steel & nonferrous metals. On the other hand, 13 out of 21 studies in the chemicals sub-sector have been utilized with relatively low rate of 61.9%. It is suspected that several factors such as the necessity of large-scale plants and enormous investments, violent fluctuations in raw materials prices, and environmental problems have made it difficult to materialize the studies in the chemicals sub-sector.

The reasons for the low utilization rate for the hydroelectric power generation (25.0%) include the arising environmental consciousness, difficulty of the transfer of the residents in the planned sites for the construction of dams, and so forth. In Thailand for instance, a rise in public environmental consciousness and criticism by NGOs halted the Nam Chon dam construction project at the upper Kwai River in 1988. Likewise, the dam construction project at the upper Yuam River was cancelled. Furthermore, the site for the switchyard for the Lam Ta Khong hydroelectric power station project was altered, since the planned sites did not conform to environmental regulations. Thus, it tends to become difficult to construct large-scale hydroelectric power plants in recent years.

**Table 4-4 Present Status of the M/P Studies Group by Sector**

	In Progress or In Use	Delayed	Discontinued or Cancelled	Total
<b>Mining</b>	9 (81.8%)	1 (9.1%)	1 (9.1%)	11 (100.0%)
<b>Energy</b>	55 (76.4%)	10 (13.9%)	7 (9.7%)	72 (100.0%)
<b>Energy (General)</b>	22 (88.0%)	3 (12.0%)	0 (0.0%)	25 (100.0%)
<b>Hydraulic Power</b>	2 (25.0%)	2 (25.0%)	4 (50.0%)	8 (100.0%)
<b>Thermal Power</b>	6 (100.0%)	0 (0.0%)	0 (0.0%)	6 (100.0%)
<b>Transmission &amp; Distribution</b>	7 (87.5%)	1 (12.5%)	0 (0.0%)	8 (100.0%)
<b>Gas, Coal &amp; Oil</b>	9 (75.0%)	1 (8.3%)	2 (16.7%)	12 (100.0%)
<b>New &amp; Recycled Energy</b>	9 (69.2%)	3 (23.1%)	1 (7.7%)	13 (100.0%)
<b>Industry</b>	163 (79.9%)	32 (15.7%)	9 (4.4%)	204 (100.0%)
<b>Industry (General)</b>	56 (87.5%)	7 (10.9%)	1 (1.6%)	64 (100.0%)
<b>Chemicals</b>	13 (61.9%)	5 (23.8%)	3 (14.3%)	21 (100.0%)
<b>Steel &amp; Nonferrous Metals</b>	13 (76.5%)	4 (23.5%)	0 (0.0%)	17 (100.0%)
<b>Ceramics</b>	4 (100.0%)	0 (0.0%)	0 (0.0%)	4 (100.0%)
<b>Machine Industry</b>	59 (79.7%)	12 (16.2%)	3 (4.1%)	74 (100.0%)
<b>Other Industries</b>	18 (75.0%)	4 (16.7%)	2 (8.3%)	24 (100.0%)
<b>Others</b>	27 (87.1%)	2 (6.5%)	2 (6.5%)	31 (100.0%)
<b>Total</b>	254 (79.9%)	45 (14.2%)	19 (6.0%)	318 (100.0%)



## 2-4. Status of Studies “Delayed, Discontinued or Cancelled”

Regarding 64 studies classified as “Delayed” or “Cancelled or Discontinued”, reasons for delays were obtained from the recipient governments in 36 studies (multiple answers obtained for 6 studies), while for 27 studies, reasons are unknown. According to the answers obtained, the major factors for the delays are domestic issues which covers 52.2% (36 studies), including economic factors (14 studies), political factors (seven studies), policy-related factors (five studies), administrative factors (five studies) and others related to technical and socio-environmental issues (five studies).

Besides domestic issues, difficulty in procuring funding from abroad is another reason, and there are five studies (7.2%).

Table 4-5 Reasons for Delays in the M/P Studies Group

	ASEAN	Others (Asia)	Middle East	Africa	Central & South America	Other Region	Total
1. Lack of Feasibility	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (14.3%)	1 (1.4%)
2. Postponement of Related Project	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
3. Difficulty in Fund Procurement from Foreign Countries	0 (0.0%)	1 (3.6%)	0 (0.0%)	3 (27.3%)	0 (0.0%)	1 (14.3%)	5 (7.2%)
4. Reasons on the Side of Recipient Country	6 (85.7%)	8 (28.6%)	3 (60.0%)	8 (72.7%)	7 (63.6%)	4 (57.1%)	36 (52.2%)
4.1 Policy-Related Factor	1 (14.3%)	0 (0.0%)	1 (20.0%)	2 (18.2%)	2 (18.2%)	1 (14.3%)	7 (10.1%)
4.2 Economic Factor	1 (14.3%)	4 (14.3%)	1 (20.0%)	4 (36.4%)	2 (18.2%)	2 (28.6%)	14 (20.3%)
4.3 Political Factor	1 (14.3%)	1 (3.6%)	1 (20.0%)	1 (9.1%)	0 (0.0%)	1 (14.3%)	5 (7.2%)
4.4 Administrative Factor	0 (0.0%)	2 (7.1%)	0 (0.0%)	1 (9.1%)	2 (18.2%)	0 (0.0%)	5 (7.2%)
4.5 Others	3 (42.9%)	1 (3.6%)	0 (0.0%)	0 (0.0%)	1 (9.1%)	0 (0.0%)	5 (7.2%)
Total	6 (85.7%)	9 (32.1%)	3 (60.0%)	11 (100.0%)	7 (63.6%)	6 (85.7%)	42 (60.9%)
Unknown	1 (14.3%)	19 (67.9%)	2 (40.0%)	0 (0.0%)	4 (36.4%)	1 (14.3%)	27 (39.1%)
Number of Development Studies	7 (100.0%)	28 (100.0%)	5 (100.0%)	11 (100.0%)	11 (100.0%)	7 (100.0%)	69 (100.0%)

\* Multiple categories may apply to some items.

### 3. Status of Completed Studies in the F/S Studies Group

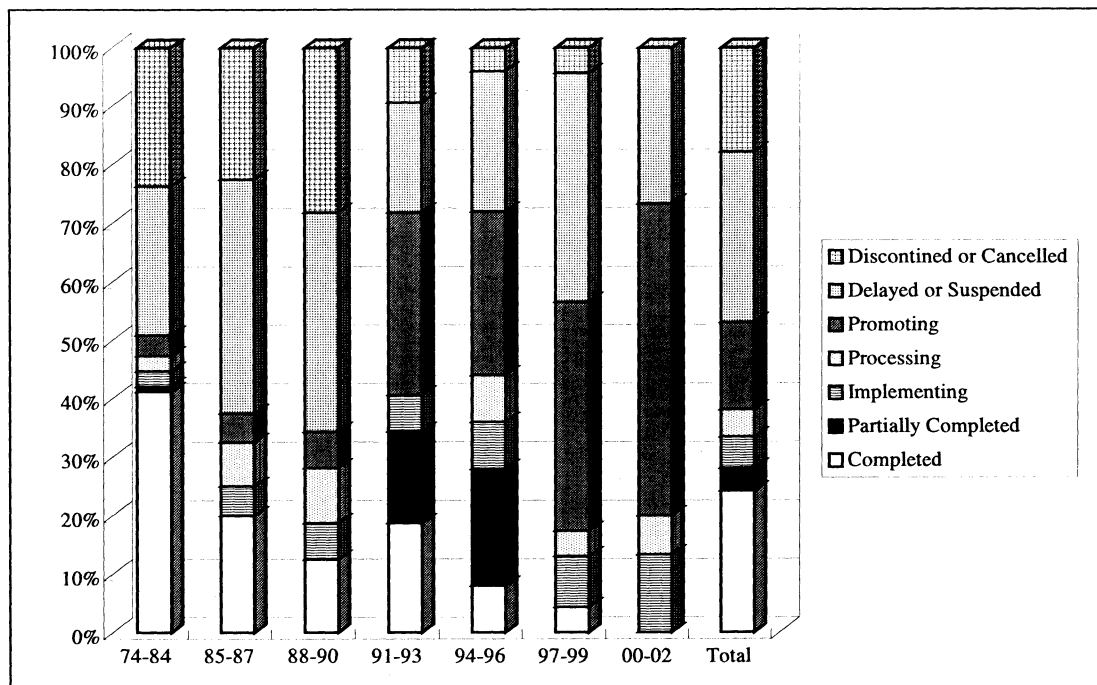
Out of 281 studies in the F/S studies group completed from FY 1974 to FY 2002, 107 studies (38.1%) are "Completed or In Progress" and their proposed projects are at the materialization stage. 107 studies categorized as "Completed or In Progress" consist of 68 "Completed", 11 "Partially Completed", 15 "Under Implementation", and 13 "In Process" studies. In addition, 42 studies are classified as studies "Under Promotion". However, 132 studies (47.0%) of completed studies in the F/S studies group are either "Delayed or Suspended" or "Discontinued or Cancelled".

With regard to the realization rate before FY 1996, it had been in the range of 40% to 50%, and it declined to around 30% from FY 1985 to FY1990. One of the reasons of the decline could be the economic crisis occurred in Asia. Especially in Mining and Industrial Development Studies, the project cost is so high as it is liable to be influenced by the economic situation of the recipient country. Furthermore, its economic and financial assessment has a big effect over the judgment for the investment. The realization rate after FY1997 is low, this is because that it is not long enough after the completion of the studies to begin the project. In accordance with this trend, the rate of "Delayed or Suspended" and "Discontinued or Cancelled" studies was always over 50% from FY 1974 to 1990, however, there has been none in the last three years (FY2000-FY2002).

Table 4-6 Present Status of the F/S Studies Group by Study Completion Year

	74-84	85-87	88-90	91-93	94-96	97-99	00-02	Total
Completed or In Progress	54 (47.4%)	13 (32.5%)	9 (28.1%)	13 (40.6%)	11 (44.0%)	4 (17.4%)	3 (20.0%)	107 (38.1%)
Completed	47 (41.2%)	8 (20.0%)	4 (12.5%)	6 (18.8%)	2 (8.0%)	1 (4.3%)	0 (0.0%)	68 (24.2%)
Partially Completed	1 (0.9%)	0 (0.0%)	0 (0.0%)	5 (15.6%)	5 (20.0%)	0 (0.0%)	0 (0.0%)	11 (3.9%)
Under Implementation	3 (2.6%)	2 (5.0%)	2 (6.3%)	2 (6.3%)	2 (8.0%)	2 (8.7%)	2 (13.3%)	15 (5.3%)
In Process	3 (2.6%)	3 (7.5%)	3 (9.4%)	0 (0.0%)	2 (8.0%)	1 (4.3%)	1 (6.7%)	13 (4.6%)
Under Promotion	4 (3.5%)	2 (5.0%)	2 (6.3%)	10 (31.3%)	7 (28.0%)	9 (39.1%)	8 (53.3%)	42 (14.9%)
Delayed or Suspended	29 (25.4%)	16 (40.0%)	12 (37.5%)	6 (18.8%)	6 (24.0%)	9 (39.1%)	4 (26.7%)	82 (29.2%)
Discontinued or Cancelled	27 (23.7%)	9 (22.5%)	9 (28.1%)	3 (9.4%)	1 (4.0%)	1 (4.3%)	0 (0.0%)	50 (17.8%)
Total	114 (100.0%)	40 (100.0%)	32 (100.0%)	32 (100.0%)	25 (100.0%)	23 (100.0%)	15 (100.0%)	281 (100.0%)

Figure 4-2 Present Status of the F/S Studies Group by Study Completion Year



### 3-1. Realization Status of Completed Studies by Region

As for realization status by regions, the realization rate in ASEAN countries, with a large number of studies conducted, mark 41.8% (51 out of 122 studies) are categorized as “Completed or In Progress”. This figure is higher than the average realization rate of 38.1%. The rate has undergone a transition as follows; 45.5% (FY1991-93), 50.0% (FY1994-96), 0%(FY1997-99), 40.0%(FY2000-02). It should be noted that although the rate is 0% in FY1997-99, there are more studies “Under Promotion” (57.1%) than those in other period. This suggests that there is a great possibility that those studies would make progress into the status of “Completed or In Progress” in the near future. The rate of “Delayed or Suspended” and “Discontinued or Cancelled” studies is 46.7% which is as high as the average of all the regions (47.0%).

In all regions, Middle East marks the highest realization rate of 43.6% (17 out of 39 studies), followed by ASEAN (41.8%) and Other Asia (Asia except ASEAN) (35.0%).

The realization rates of studies in Africa and Central and South America are 34.6%, 25.0% and the rate of studies “Under Promoting” is only 7.7%, 25.0% respectively, both of which are low, compared to other regions. Furthermore, the rates for “Delayed or Suspended” and “Discontinued or Cancelled” studies are 57.7%, 50.0% respectively and this resulted in overall low realization rates in these

regions.

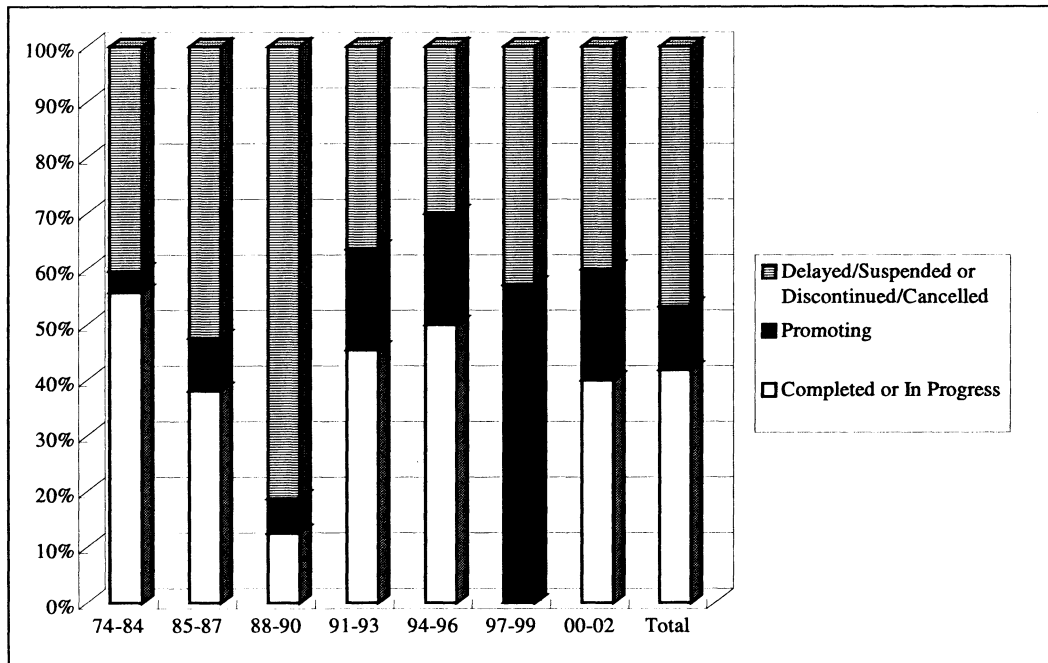
With regard to Oceania and Europe, it is difficult to analyze their tendencies appropriately because only few studies have been conducted so far.

Table 4-7 Present Status of the F/S Studies Group by Region

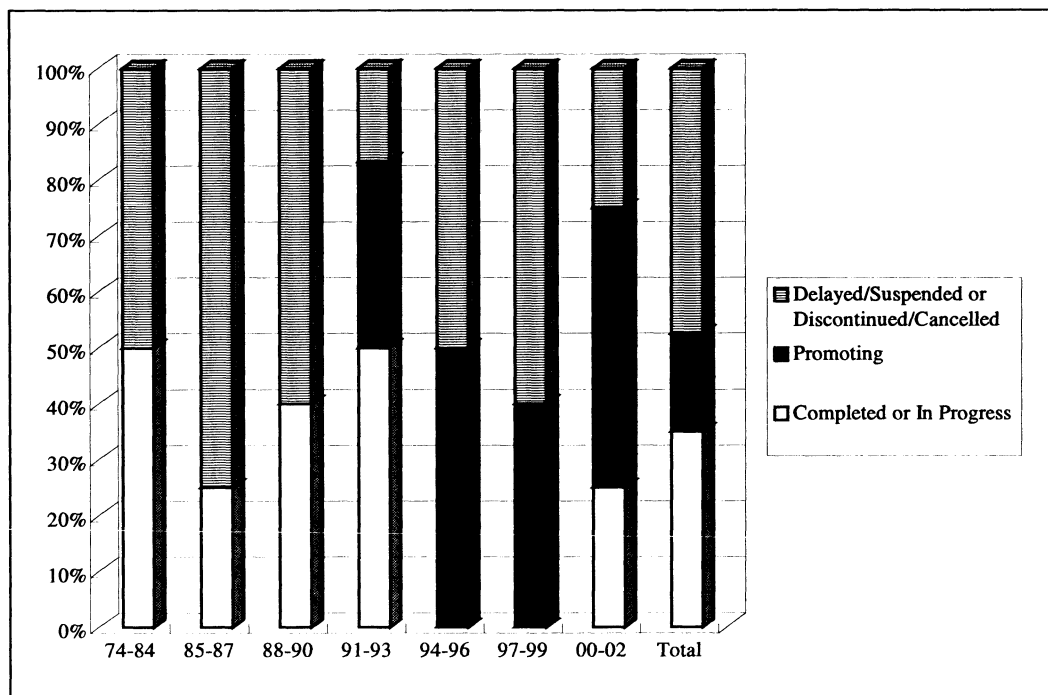
	ASEAN	Asia (except ASEAN)	Middle East	Africa	Central & South America	Oceania	Europe	Middle Asia	Total
Completed or In Progress	51 (41.8%)	14 (35.0%)	17 (43.6%)	9 (34.6%)	11 (25.0%)	0 (0.0%)	5 (62.5%)	0 (0.0%)	107 (38.1%)
Completed	35 (28.7%)	11 (27.5%)	10 (25.6%)	6 (23.1%)	6 (13.6%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	68 (24.2%)
Partially Completed	4 (3.3%)	0 (0.0%)	1 (2.6%)	0 (0.0%)	1 (2.3%)	0 (0.0%)	5 (62.5%)	0 (0.0%)	11 (3.9%)
Under Implementation	7 (5.7%)	2 (5.0%)	3 (7.7%)	1 (3.8%)	2 (4.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	15 (5.3%)
In Process	5 (4.1%)	1 (2.5%)	3 (7.7%)	2 (7.7%)	2 (4.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	13 (4.6%)
Under Promotion	14 (11.5%)	7 (17.5%)	7 (17.9%)	2 (7.7%)	11 (25.0%)	0 (0.0%)	1 (12.5%)	0 (0.0%)	42 (14.9%)
Delayed or Cancelled	27 (22.1%)	13 (32.5%)	10 (25.6%)	14 (53.8%)	15 (34.1%)	1 (50.0%)	2 (25.0%)	0 (0.0%)	82 (29.2%)
Discontinued or Cancelled	30 (24.6%)	6 (15.0%)	5 (12.8%)	1 (3.8%)	7 (15.9%)	1 (50.0%)	0 (0.0%)	0 (0.0%)	50 (17.8%)
<b>Total</b>	<b>122</b> <b>(100.0%)</b>	<b>40</b> <b>(100.0%)</b>	<b>39</b> <b>(100.0%)</b>	<b>26</b> <b>(100.0%)</b>	<b>44</b> <b>(100.0%)</b>	<b>2</b> <b>(100.0%)</b>	<b>8</b> <b>(100.0%)</b>	<b>0</b> <b>(0.0%)</b>	<b>281</b> <b>(100.0%)</b>

Figure 4-3 Present Status of the F/S Studies Group by Region

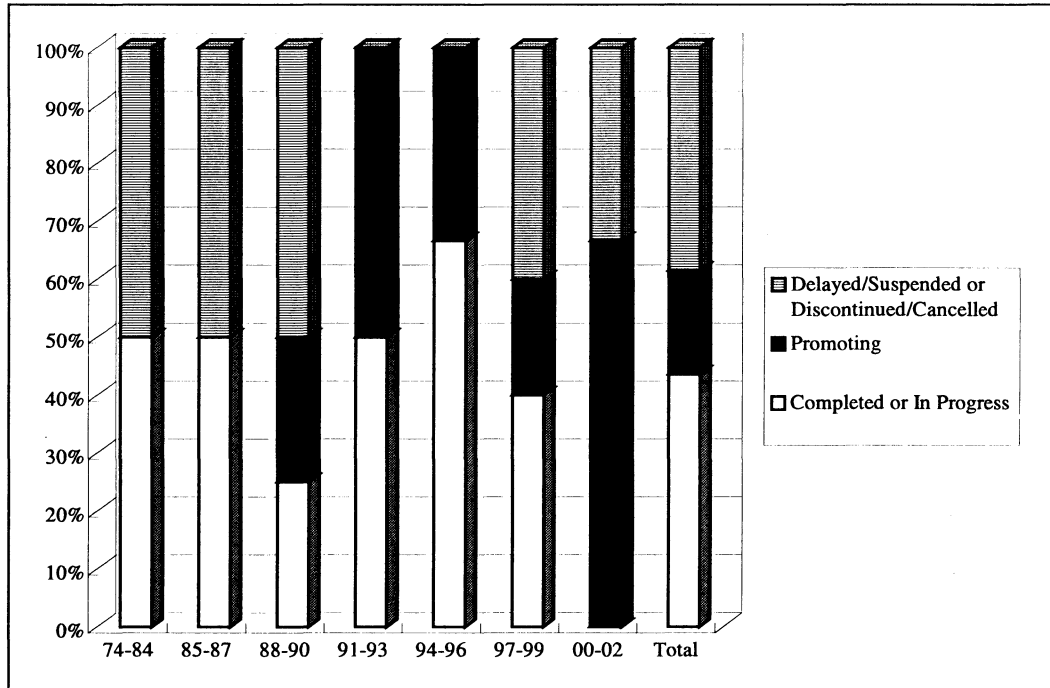
ASEAN



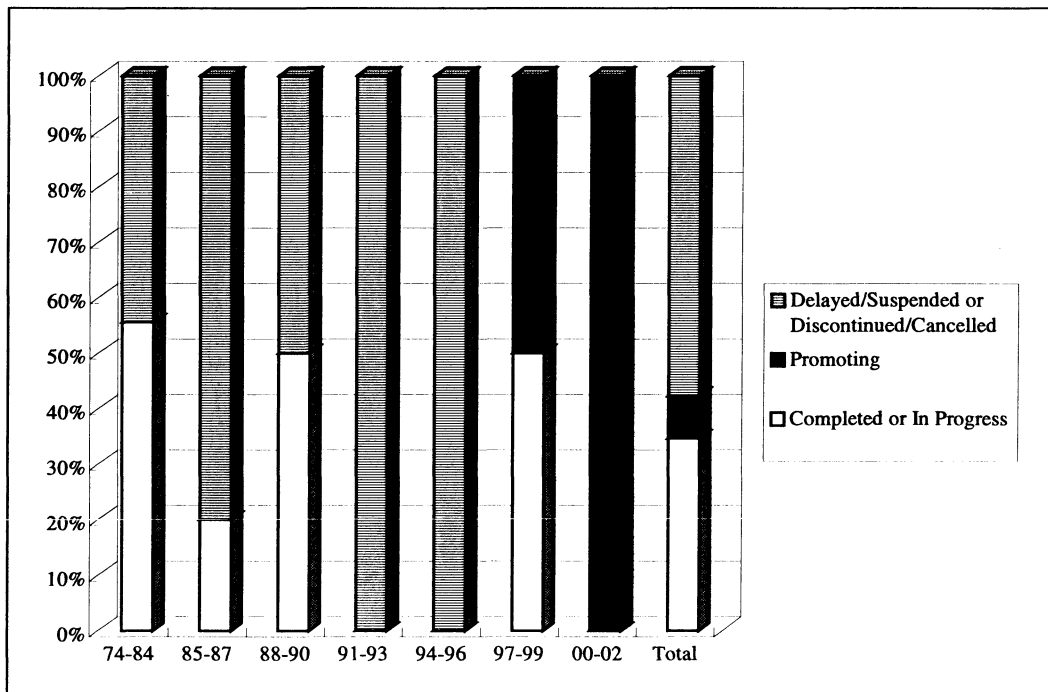
Asia (except ASEAN)



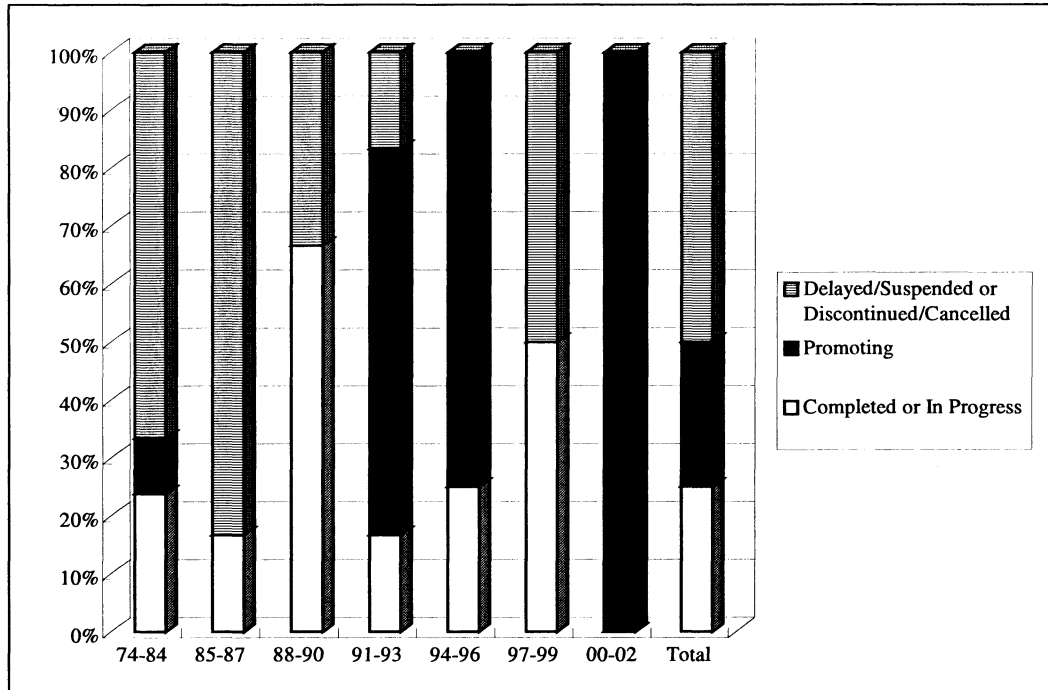
## Middle East



## Africa



## Central & South America



### 3-2. Realization Status of Completed Studies by Study Type

ASEAN Plant Renovation Studies, seven of which have already been completed, show the highest realization rate (63.6%) among 281 completed studies in the F/S studies group. Since F/S holds 94.0% of the F/S studies group, the realization status of F/S follows the same trend as the F/S studies group. Six other (F/S-type) studies comprise two "Completed" studies along with one "Under Implementation," one "Delayed or Suspended," and one "Discontinued or Cancelled" study.

**Table 4-8 Present Status of the F/S Studies Group by Type of Study**

	F/S Studies	ASEAN Plant Renovation Studies	Other Studies	Total
Completed or In Progress	96 (36.4%)	7 (63.6%)	4 (66.7%)	107 (38.1%)
Completed	59 (22.3%)	7 (63.6%)	2 (33.3%)	68 (24.2%)
Partially Completed	10 (3.8%)	0 (0.0%)	1 (16.7%)	11 (3.9%)
Under Implementation	14 (5.3%)	0 (0.0%)	1 (16.7%)	15 (5.3%)
In Process	13 (4.9%)	0 (0.0%)	0 (0.0%)	13 (4.6%)
Under Promotion	41 (15.5%)	1 (9.1%)	0 (0.0%)	42 (14.9%)
Delayed or Suspended	79 (29.9%)	2 (18.2%)	1 (16.7%)	82 (29.2%)
Discontinued or Cancelled	48 (18.2%)	1 (9.1%)	1 (16.7%)	50 (17.8%)
<b>Total</b>	<b>264</b> (100.0%)	<b>11</b> (100.0%)	<b>6</b> (100.0%)	<b>281</b> (100.0%)

### 3-3. Realization Status of Completed Studies by Sector

The realization rate of studies in the industry sector is 41.1% (39 out of 95 studies) which is slightly higher than that for the energy sector (37.3%, 63 out of 169 studies). On the other hand, looking at the rate of "Completed" studies, industry sector marks 33.7% (32 out of 95 studies), which outdistances the rate of 20.1% (34 out of 169 studies) for the energy sector. The rate for studies "Delayed or Suspended" or "Discontinued or Cancelled" in the industry sector is 52.6% (50 out of 95 studies), which is about ten percent higher than 43.2% (73 out of 169 studies) of the energy sector.



**Table 4-9 Present Status of the F/S Studies Group by Sector**

	Completed	Partially Completed	Under Implementation	In Process	Under Promotion	Delayed or Suspended	Discontinued or Cancelled	Total
Mining	2 (20.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (10.0%)	4 (40.0%)	3 (30.0%)	10 (100.0%)
Energy	34 (20.1%)	5 (3.0%)	11 (6.5%)	13 (7.7%)	33 (19.5%)	52 (30.8%)	21 (12.4%)	169 (100.0%)
Energy (General)	0 (0.0%)	0 (0.0%)	2 (22.2%)	1 (11.1%)	1 (11.1%)	5 (55.6%)	0 (0.0%)	9 (100.0%)
Hydraulic Power	11 (12.2%)	1 (1.1%)	7 (7.8%)	8 (8.9%)	21 (23.3%)	32 (35.6%)	10 (11.1%)	90 (100.0%)
Thermal Power	7 (35.0%)	2 (10.0%)	2 (10.0%)	0 (0.0%)	2 (10.0%)	5 (25.0%)	2 (10.0%)	20 (100.0%)
Transmission & Distribution	11 (50.0%)	2 (9.1%)	0 (0.0%)	4 (18.2%)	2 (9.1%)	1 (4.5%)	2 (9.1%)	22 (100.0%)
Gas, Coal & Oil	4 (25.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	3 (18.8%)	6 (37.5%)	3 (18.8%)	16 (100.0%)
New & Recycled Energy	1 (8.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	4 (33.3%)	3 (25.0%)	4 (33.3%)	12 (100.0%)
Industry	32 (33.7%)	4 (4.2%)	3 (3.2%)	0 (0.0%)	6 (6.3%)	25 (26.3%)	25 (26.3%)	95 (100.0%)
Industry (General)	5 (26.3%)	2 (10.5%)	1 (5.3%)	0 (0.0%)	0 (0.0%)	6 (31.6%)	5 (26.3%)	19 (100.0%)
Chemicals	9 (34.6%)	1 (3.8%)	0 (0.0%)	0 (0.0%)	1 (3.8%)	10 (38.5%)	5 (19.2%)	26 (100.0%)
Steel & Nonferrous Metals	6 (42.9%)	0 (0.0%)	1 (7.1%)	0 (0.0%)	0 (0.0%)	1 (7.1%)	6 (42.9%)	14 (100.0%)
Ceramics	2 (22.2%)	0 (0.0%)	1 (11.1%)	0 (0.0%)	2 (22.2%)	2 (22.2%)	2 (22.2%)	9 (100.0%)
Machine Industry	4 (57.1%)	1 (14.3%)	0 (0.0%)	0 (0.0%)	1 (14.3%)	0 (0.0%)	1 (14.3%)	7 (100.0%)
Other industries	6 (30.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	2 (10.0%)	6 (30.0%)	6 (30.0%)	20 (100.0%)
Other	0 (0.0%)	2 (28.6%)	1 (14.3%)	0 (0.0%)	2 (28.6%)	1 (14.3%)	1 (14.3%)	7 (100.0%)
<b>Total</b>	<b>68 (24.2%)</b>	<b>11 (3.9%)</b>	<b>15 (5.3%)</b>	<b>13 (4.6%)</b>	<b>42 (14.9%)</b>	<b>82 (29.2%)</b>	<b>50 (17.8%)</b>	<b>281 (100.0%)</b>
Number of Development Studies	68	11	15	13	42	81	50	280

\* "OMN/M 002/85" is counted for Thermal Power and Industry (General) in duplicate.

Looking into the realization status by sub-sectors, in the energy sector at first, the realization rate for the transmission & distribution sub-sector is 77.3%, which is the highest rate in all. The second highest realization rate is marked by the thermal power generation (55.0%). Other sub-sectors in the same sector, the rate is below 30.0%. The realization rate for hydroelectric power generation, with the

largest number of studies conducted, is 30.0%, which is lower than the average of 36.1%. In 12 new & renewable energies, the realization rate is 8.3%, whereas 58.3% of the studies are categorized as “Delayed or Suspended” or “Discontinued or Cancelled”. This result shows a difficulty to realize the proposed projects.

Differences by sub-sector in the industry sector are smaller than those in the energy sector. Although there are only seven studies completed in the machine industry sub-sector, the realization rate is 71.4% (five out of seven studies), which is the highest in the industry sector. In addition, the rate for “Discontinued or Cancelled” in the machine industry sub-sector is 14.3%, which is the lowest in the industry sector. Sub-sectors that have low realization rates include other industries (30.0%), ceramics industry (33.3%), and chemicals (38.5%). Sub-sectors with high rates of “Delayed or Suspended” and “Discontinued or Cancelled” studies include other industries (60.0%), chemicals (57.7%), and steel & nonferrous metals (50.0%)

### 3-4. Status of Studies “Delayed or Suspended” or ”Discontinued or Cancelled”

Out of 281 studies in the F/S studies group, 132 have been categorized as “Delayed or Suspended”. The major factors for the delays are domestic issues in recipient countries (100 studies), and in which economic factors occupy a large number (43 studies). “Others” refers to environmental problems such as pollution, wars, and opposition from the local people.

Lack of feasibility is commonly seen in Africa, Asia (except ASEAN) and the Middle East. Other major factors include “Difficulty in fund procurement from foreign countries” (14 studies) and “Lack of feasibility” (10 studies).

Table 4-10 Delayed Reasons of the F/S Studies Group

	ASEAN	Others (Asia)	Middle East	Africa	Central & South America	Other Regions	Total
Lack of Feasibility	2 (3.6%)	2 (10.0%)	2 (12.5%)	3 (20.0%)	1 (4.6%)	1 (25.0%)	11 (8.3%)
Postponement of Related Project	1 (1.8%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (4.6%)	1 (25.0%)	3 (2.3%)
Difficulty in fund Procurement From Foreign Countries	6 (10.8%)	2 (10.0%)	1 (6.3%)	3 (20.0%)	1 (4.6%)	1 (25.0%)	14 (10.6%)
Reasons on the side of Recipient County	45 (80.4%)	16 (80.0%)	13 (81.3%)	7 (46.7%)	18 (81.9%)	1 (25.0%)	100 (75.2%)
Policy-Related Factor	5 (9.0%)	1 (5.0%)	2 (12.5%)	0 (0.0%)	3 (13.7%)	1 (25.0%)	12 (9.1%)
Economic Factor	17 (30.4%)	6 (30.0%)	5 (31.3%)	4 (26.7%)	11 (50.0%)	0 (0.0%)	43 (32.4%)
Political Factor	10 (17.9%)	6 (30.0%)	4 (25.0%)	2 (13.4%)	1 (4.6%)	0 (0.0%)	23 (17.3%)
Administrative Factor	2 (3.6%)	1 (5.0%)	2 (12.5%)	0 (0.0%)	2 (9.1%)	0 (0.0%)	7 (5.3%)
Others	11 (19.7%)	2 (10.0%)	0 (0.0%)	1 (6.7%)	1 (4.6%)	0 (0.0%)	15 (11.3%)
Total	54 (96.5%)	20 (100.0%)	16 (100.0%)	13 (86.7%)	21 (95.5%)	4 (100.0%)	128 (96.3%)
Unknown	2 (3.6%)	0 (0.0%)	0 (0.0%)	2 (13.4%)	1 (4.6%)	0 (0.0%)	5 (3.8%)
Number of Development Studies	56 (100.0%)	20 (100.0%)	16 (100.0%)	15 (100.0%)	22 (100.0%)	4 (100.0%)	133 (100.0%)

\* Multiple categories may apply to some items.

When it comes to trends by regions, in ASEAN countries, domestic issues in the recipient countries accounted for 80.4% of the reasons for delays and suspensions. Of these, economic and policy-related factors were most prevalent. In Asia (except ASEAN), the main reason for delays and suspensions is also domestic issues in recipient countries (80.0%) and economic and policy-related factors are as common as in ASEAN.

In the Middle East as well, domestic issues in recipient countries accounted for 81.3% of the reasons for delays and suspensions. Besides that, "Lack of feasibility" is observed (12.5%) in this region. Also in the Central and South America, economic-related factors looms large as domestic issues.

In Africa the trend is slightly different. Reasons for delays and suspensions regarding domestic issues hold 46.7%, which is the lowest percentage among all the regions, and lack of feasibility (20.0%) and difficulty in fund procurement (20.0%) show relatively high figure. The main domestic issue has to do with more economic-related factors compared with other regions.

Above all, most of the delays and suspensions are attributed to domestic issues, in which the proportion of economic and political factors are relatively high.

CHAPTER 5  
CONCLUSIONS

## CHAPTER 5. CONCLUSIONS

### 1. Conclusions

#### 1-1. M/P Studies group

This follow-up study covers 1,976 Development Studies. 806 Development Studies (40.8% of all the total Development Studies) belong to the M/P studies group. The M/P studies group consists of 525 M/P studies (65.1% of the M/P studies group), 110 basic studies (13.6%), 117 studies on the Factories Modernization Program in China (14.5%), and 54 other (M/P-type) studies (6.7%). In 706 out of 806 completed studies, the proposed projects have been implemented or the study findings were utilized to formulate national development plans. The utilization rate of Development Study is 87.6%, which is extremely high.

The largest number of studies in the M/P studies group (57.6% of the total) was conducted in Asia, particularly in ASEAN countries, where 30.9% of the total studies were conducted. The utilization rate exceeded 85.0% in every region; 87.9% in Asia, 88.2% in Central and South America, 85.1% in Middle East and in Africa. Since there are few studies in Oceania, Europe and in the countries where studies cover more than one single country (multiple country), it is difficult to evaluate the utilization rates in these regions.

With a utilization rate of 89.1%, the M/P study is the most effectively utilized type of study in the M/P studies group. The other types of studies also have favorable utilization rates: 81.2% for Studies on the Factories Modernization Program in China; 90.9% for basic studies; and 79.6% for other studies.

The utilization rate is 92.2% for the social development area, 93.9% for the agriculture, forestry and fishery development area, and 79.9% for the mining and industrial development area. The utilization rate for the mining and industrial development area is slightly lower than for the other two areas. In the social development area, the transportation and social infrastructure subsectors occupy a large portion. In the agriculture, forestry and fishery development area, agriculture is the largest subsector. In the mining and industrial development area, industry is the largest subsector. The utilization rates in social infrastructure, transportation, agriculture and industry subsectors are 90.4%, 92.7%, 94.6% and 79.9% respectively, which are considered to be fair.

Judging from the analysis of studies in the social development and agriculture, forestry, and fishery areas, carrying out subsequent studies in a timely manner and procuring funds appropriately seem to be important for utilization of study results. In most studies whose results were utilized smoothly, subsequent study and procurement of funds had been realized within five years. Thus, the recipient country's policies could affect materialization of study results.

## 1-2. F/S Studies group

Out of total 1,976 Development Studies, 1,170 studies (59.6%) belong to the F/S studies group. The F/S studies group consists of 790 F/S studies (67.5% of the total), 342 M/P + F/S (29.2%), and 38 D/D studies (3.2%). There are 697 studies categorized into "Completed or In Progress" with a realization rate of 59.6%. Hence, it is difficult to say that results of the F/S studies group have not been realized effectively. Since there are 216 studies prepared for realization, however, the realization rate should improve in the near future.

The largest number of studies in the F/S studies group was conducted in Asia (58.3% of the total), particularly in ASEAN countries (42.4% of the total). The realization rate is 64.1% in Asia, 64.4% in Middle East, 48.3% in Central and South America, and 49.2% in Africa. Since there were few studies in Oceania, Europe and countries where studies cover more than one single country (multiple country), it is difficult to evaluate the utilization rates in these regions.

By study type, the realization rate of D/D studies marks the highest at 84.2%. This reflects the nature of D/D studies in which they are the final study for realization. The situation of D/D studies which are not realized is as follows; one realized study by substitute project, one "Delayed" due to lack of budget in the recipient country and four studies in "In Process" stage. As for the four "In Process" studies, two of them are about to receive the assistance by other aid organizations, and another one study is expected to obtain capital. On the other hand, the realization rates for M/P + F/S studies and for F/S (including other F/S-type studies) were 64.3% and 56.3% respectively. Since a large portion of studies has been designated in the "Under Promotion" category, 29.5%, 14.1% respectively, their realization rates ought to be improved in the near future.

Analysis by area shows a difference in realization rates. The realization rates in the social development area, in the agriculture, forestry, and fishery development area, and in the mining and industrial development area are 69.3%, 58.8%, and 38.1% respectively. The largest sub-sector in social development area is transportation with a realization rate of 69.6%. In the agriculture, forestry, and fishery development area, nearly all the studies were in the agriculture sub-sector, whose realization rate is 60.0%. In the mining and industrial development area, the energy sub-sector was the largest with a realization rate of 37.3%.

Judging from the analysis of studies in the social development and agriculture, forestry, fishery areas, one of important factors in utilizing study results is the



existence of Japanese financial assistance. In most studies whose results were realized smoothly, Japanese ODA loans or Grant Aid had been utilized. Therefore, the recipient country's policy could affect materialization of study results.

## 2. Proposals

### 2-1. Consideration on Designation of Plans

Some of the reasons study results were not utilized effectively were circumstances such as “political factors” and “economic factors” in recipient countries. “Political factors” mainly were a matter of inconsistencies of study result with national development plans or decreased priority placed on study results. On the other hand, “economic factors” mainly had to do with national financial difficulties or structural adjustment.

In formulation and implementation of Development Studies, it is necessary to consider consistency with national development plans and to ascertain continuity and priority of development policies. In addition, it is essential for designation of a plan to consider funding resources, taking into account the recipient's financial condition. In regard to procurement of funding from Japan, coordination with other donors and development banks would be crucial.

### 2-2. Improvement of Utilization / Realization Rate

In order to improve the utilization / realization rate, measures such as subsequent studies, review studies and grant of supplemental instruments might be vital.

In delayed or suspended cases, it would be effective to implement a study to clarify the problems, examine alteration or modification of project details and scale, and recalculate project expenses if necessary.

In order to take these countermeasures, a grasp of the current situation is important. Hence, enforcement of regular monitoring by JICA overseas offices and feedback on the study results are desirable.

### 2-3. Improvement of Methodology of Follow-up Study

It would be necessary to continue to grasp the current situation and status of Development Studies, to encourage utilization / realization of the study results, and to clarify impeding factors.

In order to improve the quality and quantity of replies to questionnaires from counterpart organizations, conducting follow-up surveys for a fixed period of time and evaluating the conditions for realization might be included in Development Study.