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**INDUSTRIAL SUBCONTRACTING AND
PARTNERSHIP EXCHANGE**

JORDAN

Report of the evaluation mission*

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* This document has not been edited.

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Introduction

In the context of the Subcontracting and Partnership Exchange (SPX) Programme evaluation a questionnaire was sent to all SPXs supported by the UNIDO programme and field visits were undertaken to eight countries with SPXs. One of the visited countries was Jordan. The evaluation mission by Mr. Jaroslav Navratil, UNIDO Senior Evaluation Officer, to Jordan was undertaken on 26 March - 2 April 1996. Since that time some changes have occurred: UNIDO was informed on 22 April 1996 that the decision to transfer the SPX unit to the Jordan Export Development and Commercial Centres Corporation (JEDCO) had been implemented. The country report, which will be used in the preparation of the programme evaluation report, reflects the situation at the time of the field mission.

A methodological note: National SPXs are institution-building outputs of the programme. Information and conclusions related to the level of their production (level of the developed capability) reflect as far as feasible the standard description of institution building outputs (staffing, equipment, methodologies, etc.)

UNIDO support projects

The SPX in Jordan was established in 1991. The establishment and operation of the SPX in Jordan have so far been supported by two projects:

	<i>Original budget (US\$)</i>	<i>Actual Expenditure (US\$)</i>
DP/JOR/87/01	57,000	73,132 (completed)
SI/JOR/94/801	80,000	53,767 (on-going)

In the case of the DP project most of the budget (approximately US\$ 47,000) was used for consultants (BL 11); study tours for purposes of training and participation at fairs amounted to US\$ 12,000 and equipment (mainly PCs) amounted to approximately US\$ 10,000. The project was completed in 1993.

The second (SIS) project has also been used primarily for expert support (approximately US\$ 37,000) with a smaller portion of the budget used for training and participation at fairs.

The Jordan SPX also benefitted from three regional projects (DP/RAB/86/001, DP/RAB/89/013 and US/RAB/90/018, total expenditures approximately US\$ 1,8 million). The regional projects aimed at developing and disseminating common methodologies for subcontracting in the Arab region, supporting the establishment of national SPXs and creating a network of SPXs in the Arab region. The regional projects covered a large number of countries (Morocco, Algeria, Tunisia, Egypt, Jordan, Syria, Iraq, Lebanon) but the allocation of inputs to individual countries was rather uneven. While some countries were supported heavily by the regional projects, Jordan benefitted from the regional project in a rather limited way (several consultant missions prior and after the establishment of the SPX and a few study tours to participate at training events and international fairs). Jordan, of course, benefitted also from the common methodologies and tools developed under the regional projects.

In total 24 study tours have been financed under BL 32, out of which 17 were for participation at fairs and 7 for participation in training courses and/or meetings of the steering committee of the regional project. Nine persons took part in the study tours, eight of them were staff members of the SPX, one of them was the President of the Steering Committee. (Three of the former study tour participants are no longer with the SPX.)

Institutional Framework

The SPX was established as a unit in the Ministry of Industry and Trade.

As long as the Unit had the strong backing of the Ministry the activities progressed satisfactorily. During 1994 the Unit reached the peak of its performance. In 1995 the performance decreased and it became apparent that the administrative regulations of the Ministry coupled with the withdrawal of policy support for the Unit by the key policy-makers of the Ministry made it difficult for the Unit to operate. Access to a car and to fax communication has become cumbersome. (The UNIDO evaluation officer himself experienced difficulties in contacting directly the manager of the SPX.)

Efforts were made to change the institutional setting for the Unit. One of the logical candidates to take over the Unit was the Amman Chamber of Industry which considers itself to be an optimal focal point for sub-contracting activities. The Chamber (staff approximately 45, compulsory membership) works in 14 sub-sectors, each of which is supported by an Advisory Committee entrusted, *inter alia*, with identifying linkages between sub-sectors including subcontracting. For this purpose the Chamber is in touch with commercial attaches and organizes seminars for its members. At present they also plan to establish a special small unit to serve the subcontracting function of the Advisory Committees. Unfortunately the negotiations (supported by the consultants) conducted with the Amman Chamber of Industry did not result in an agreement to take over the Unit.

In 1995 a decision was taken by the Minister of Industry and Trade to transfer the Unit to JEDCO (Jordan Export Development and Commercial Centres Corporation). Entrusted with the promotion of export, the organization undertakes a range of activities, including market research, organization of seminars, participation at trade fairs, advising on product design, etc. Subcontracting activities would fit well in the range of current activities, complementing the trade-related promotion by promotion of subcontracting, so that the decision was generally appreciated.

However, after the first steps to implement the decision some disagreement arose (particularly regarding selection of staff) and implementation of the decision was suspended. At the time of the evaluation the Unit had not yet been transferred and, thus, was not operating. The most recent decision conveyed by the Secretary General of the Ministry to the Evaluation Officer implies that two staff from the SPX Unit will be transferred to JEDCO and, if required, additional staff will be recruited from outside the Ministry.

The Steering Committee of the SPX comprised the Industrial Development Bank, the Chambers of Industry and Commerce, Industrial Estate Corporation, and JEDCO. The Committee was presided by Dr. Emeish, at that time a Director of a Department at the Ministry of Industry and Trade. The last meeting was held at the end of 1994.

Project output produced (SPX):

As the Unit is not operating at the time of evaluation, the information about the SPX describes the situation in mid 1995.

S t a f f

The Unit had five full time staff (one female) with strong engineering background (three chemical engineers, one industrial engineer). There was no mechanical engineer among the staff (partly due to the fact that there was no possibility to consider candidates from outside the Ministry).

One staff member (the manager) had been with the Unit since the very beginning (1991), the others joined the Unit in the period 1992-94. Each of them participated in a study tour, most of them acquired experience in visiting plants and collecting company information for the database.

Equipment

The Unit was sufficiently equipped with PCs (three PCs 486). A fax-modem was purchased but it was not used (no line was available). The Unit was not connected to INTERNET.

The Unit did not have its own car. There was no library, the Unit only collected the leaflets and brochures brought from fairs.

According to the Secretary General of the Ministry the PCs would not be transferred with the Unit.

Tools and procedures

i) UNIDOSS

UNIDOSS was installed and used for entering data and for searching. These applications were found easy. However, searching in the database was not the only means to identify a potential subcontractor: personal knowledge of the companies was also instrumental in the matchmaking process.

Leaving aside the initial technical problems with the installation and operation of the software, the critical remarks about the operation of UNIDOSS related to two areas:

- using UNIDOSS for mailing purposes
- matchmaking with foreign companies

ii) Database

The UNIDOSS database contained 160 companies; an additional 220 companies were recorded in a separate file (the data was not entered in the UNIDOSS database). On average it took two days to collect information on one company and to enter it in the UNIDOSS database.

There was no separate file on main contractors; out of the 380 registered companies not more than 20 companies were contractors.

The database covered primarily the metal-working, plastic & rubber and electrical sectors; a few companies represented the textile and leather sectors and industrial services (maintenance, special welding). The database covered significant segments of the sectors concerned (25 -50%).

A large number of companies (50-80%) did not provide all the data required by the UNIDOSS questionnaire; in particular the companies were reluctant to provide business-related information, including the information on capacity utilization.

As a consequence of the operational problems, since 1994 the database has not been updated and no new companies have been added to it.

iii) Procedures

Except for the standard nomenclature and a few standard forms (such as the one to record matchmaking) there were no written procedures or rules of operation applied by the SPX. However, some principles were established and applied as a routine:

- At the plant level contacts were sought with the technical staff who understood better the usefulness of subcontracting and helped convince the managers/owners to provide information;
- Data not provided by the management was not substituted by own assessment;
- Matchmaking was followed up by inquiries about the progress/results (though with little success, due to the reluctance of companies to provide the required information).

iv) Brochures, promotional materials

The Unit had only a few promotional leaflets in Arabic and no promotional material in other languages.

Financing

The Unit was financed by the Ministry budget. In addition to the support by UNDP and UNIDO projects, some SPX activities were supported by different organizations. The Chamber of Commerce in Toulouse financially supported participation of 7 companies and 2 staff of the Unit at the 1995 SIAM fair in Toulouse. (The Chamber paid the air tickets for all and accommodation for the Unit staff; it also arranged for a discount on the stand fee.) At SAMEST 95, JEDCO paid transport of goods for six companies.

In view of the critical financial situation of the SMEs a service fee was not considered.

Level of activities (results)

Unless otherwise stated, the performance indicators relate to the period mid 1994 - mid 1995.

Promotional activities

In the early phase of SPX activities the Unit organized a number of awareness raising seminars on the concept of subcontracting and the role of the SPX.

In 1992 a national exhibition was organized (Local Manufacturing of Spare Parts - LMS) to display the requirements of large Jordanian companies (Potash, Phosphate, Cement, etc.) for inputs which could be produced by local subcontractors. The exhibition resulted in a number of business contacts.

In the period under review (1994-95) the Unit organized participation of 30 companies at four international fairs.

Matchmaking

Approximately 1500 inquiries were received in the period under review (approximately 30% from abroad). However, the inquiries were not recorded so that the number is an estimate of the staff;

it may be on the high side. The number also includes inquiries about sources of technical information, fairs, etc.

Most of the inquiries resulted from plant visits by the SPX staff (approximately 50%), a significant number resulted from participation at foreign and local exhibitions and only a small part was received through embassies or other institutions.

It is estimated that at least 50 contracts resulted from matchmaking activities in the reported period. The SPX has a standard form to record established contacts but the list is far from complete and any concrete evidence about the number of concluded projects is even less available. The estimate is based on personal and informal knowledge of selected cases of matchmaking.

No estimate could be made about the value of the concluded contracts.

A special case is matchmaking for partnership projects (joint ventures). Five to ten such inquiries were recorded (all of them from abroad) but no evidence is available about results of the negotiations. The SPX was not in working contact with a UNIDO IPS office nor with the Investment Promotion Corporation in Jordan.

Government procurement

The SPX did not promote participation of SMEs in the procurement programmes of Government organizations. Large programmes of the public sector are allocated through tenders announced in the newspapers.

Advisory activities

Because of their technical background the SPX staff could provide some preliminary and ad hoc advice to companies (certification procedures; testing; information on technology abroad). However, for detailed advice on quality management and certification procedures special consultants were required.

Feedback from company visits

Companies visited

Four subcontractors and one large contractor (The Arab Potash Company) were visited. The subcontractors were in the metal working and plastic sectors, all of them in the category of SMEs (60-250 employees), most of them with a considerable share of export in the turnover (over 50%). For some of them subcontracting was very important (more than 50%). In one case a company working in design and machine building intentionally reduced the share of subcontracting and moved to production of final products because subcontracting in their field was too risky: one could not predict the price level of the competition. In the case of finished products the market research is allegedly more reliable.

The subcontractors visited represented a more advanced segment of the Jordanian industry. All of them were supported by the SPX to participate at international fairs. Their views, therefore, may not be representative for all companies registered in the database.

Benefits

All the companies learned about the SPX through plant visits by SPX staff. This modality was very important; it established personal contacts and provided the SPX staff with important "soft"

knowledge about the attitudes and potentials of the company management. (This advantage, however, disappears when a staff member leaves the SPX.) It also facilitated a continuous contact with the companies. Some of them kept placing various inquiries with the SPX (about local producers, technologies abroad, etc). The SPX is believed to have the advantage of possessing information about technological capabilities of a number of local companies.

The companies appreciated in particular the possibility to participate at fairs. The "group effort" by the SPX in the organization of the Jordanian participation (common briefing, joint activities, etc.) was highlighted by some of the companies (compared to a rather individual organization of trade participation by JEDCO). They considered support by the SPX (negotiation of the discount, arranging the stand area, provision of free air ticket, etc.) as decisive for their decision to participate.

Some of the contacts established at the fairs resulted in business deals but only the Arab Potash Co. was ready to indicate a number ("at least two contracts were signed after SIAM 93, 95").

In the view of the companies, even if no contracts result from a participation at a fair, participation provides an opportunity to meet competition and potential partners and to learn about the quality, delivery and other conditions international business imposes on its participants. However, as one manager put it, one has to be fully dedicated to the task and not apply the "wait-and-see" attitude as a few Jordanian companies at MIDEAST appeared to do. (The language barrier might have contributed to this attitude.)

For the Arab Potash Company the most useful event organized by the SPX was the Local Manufacturing of Spares (LMS) fair in 1992. They learned about the potential of SMEs in the country. Many contacts were established, business contacts have been developed (rubber, overhaul of truck engines, etc.) Two new service workshops were established to serve them (rubber lining, engine rewinding). The list of suppliers and sub-contractors became longer.

LMS was partly financed by the big companies (brochures, services), the fair area was provided by the Chamber of Industry. If repeated, Potash Co. would participate again.

Critical remarks, suggestions

The visited companies were aware of the current problems of the SPX. The following views were noted:

- Filling in the company questionnaire does not necessarily bring early contacts or any contacts at all. This may result in disappointment on the part of the companies.
- The SPX should identify needs of contractors which can be met by a particular SME; a good manager is capable of negotiating the deal himself/herself.
- Some managers are ready to pay a fee for the service/information if it brings commercial results.
- The Government has the task to support industrial development, which should be done, i.e., by promoting the subcontracting principle through seminars, plant visits, etc.
- Jordan has little to offer to foreign contractors, the industry must first improve product quality. A considerable awareness-raising campaign is needed and the SPX should be a part of it.

- There should be a central point in the country for accessing information on markets and technologies which would help the manager understand what he needs and how he can access it. It should also provide training on information technology and on how to access data. An information centre with some of these functions is being developed at the World Trade Centre. The problem is that many managers do not know what information they actually need and/or they are not aware of the existing facilities to provide it.
- Large companies (such as Potash) have their own channels of communication and access to information on markets and technology.

Conclusions

The conclusions are summarized under the headings of *relevance* (whether the projects met important and real needs), *efficiency* (whether the inputs were provided in an adequate and timely manner and activities conducted efficiently and outputs were produced), *effectiveness* (whether the outputs were used and the purpose achieved), *impact* (whether economic and other development changes occurred) and *sustainability* (whether the developed capabilities were maintained or upgraded and continued to be utilized).

R e l e v a n c e

- 1) Subcontracting is a useful and desirable instrument to improve the performance of the industrial sector in Jordan; there already exist a number of industrial companies with sufficiently advanced technological capability to be able to perform the contracting and subcontracting roles.
- 2) However, the majority of SMEs can hardly enter the subcontracting market because the quality of their products and services does not meet the requirements of potential contractors, both foreign and local. In spite of a Government regulation that each tender should have at least 25% of local inputs the regulation is waived if the quality specifications cannot be met.
- 3) Another constraint of subcontracting is a cultural one, a lack of trust in the capabilities of local companies even if the capabilities are actually available. Many companies try to develop and rely on their own capacity (such as maintenance).
- 4) On the other hand at least some large local companies make the effort to deal with local SMEs applying for subcontracts, to help those which seem promising and, thus, to gradually extend the network of local suppliers.
- 5) In this context the SPX unit was a facility relevant to the needs of industry; it addressed both the needs of matchmaking (among those that have the capacity to enter the subcontracting market) and the needs to raise the awareness of the concept, including the (quality) conditions to be met and constraints to be alleviated. It, however, seems that supporting and complementary activities (introduction of quality management, access to information on technology and markets, training, etc.) were handled in parallel by other entities without coordination with the SPX.

E f f i c i e n c y

- 6) Establishment and development of the SPX functions in Jordan is primarily an institution-building project. The volume of external funds to support such an institution-building project, as outlined in the two above mentioned project budgets (approximately US\$ 130,000), is commensurate with the level of the developed SPX capability as available in the middle of 1995. However, the inputs provided to the country under the regional projects were considerable and make the assessment less favourable.

The most important component (asset) of the institution building output is the trained and experienced staff. The shortcomings of the institutional output (lack of promotional materials, deficiency in monitoring inquiries, inadequate stock of companies documentation, etc.) can be alleviated with the support of the remaining budget of the SIS project.

The inputs of the regional projects targeted at developing a network of SPX in the Arab countries have not been fully converted into the planned output - the network of SPX in Arab countries is not being used - so that the use of the project funds for this purpose cannot be considered as efficient.

7) Staff input provided by the Ministry was considerable (5-6 staff). It helped in the initial stage to build up the company database. However, in the later phase, when a new Ministry management was nominated, the number of staff performing SPX functions was considered high. Given the limited size of the industrial segment competent to enter the subcontracting market and the possibility to coordinate promotional activities with other actors in the field, the matchmaking function alone (as the key function of the SPX) could actually be performed by a lower number of staff.

8) The company database contained 380 entries but not more than 20% were actually used for matchmaking. This is a phenomenon common with other SPXs; it indicates that many companies selected for the database either do not qualify for subcontracting or there is no demand for subcontracting in their particular field.

9) For institutional reasons described above, since November 1995 the SPX has not been operating at all. This is a very unfortunate situation which implies inefficient utilization of the developed capabilities.

Effectiveness

10) The use of SPX services as expressed by the number of inquiries and number of companies participating at local and international fairs was satisfactory. Plant visits, which represent a significant workload, contributed to the promotion of the subcontracting concept and to the generation of inquiries.

11) The relation between inquiries received from local companies and from abroad is quite balanced.

12) As noted during the visits to companies and institutions, the SPX staff developed trustworthy contacts with clients; this seems to have been a significant factor influencing the use of the SPX services.

13) As the SPX has not been operating for some time, the clients are not contacting the SPX any more. No inquiry by a client has been noted by the evaluator during his mission.

Impact

14) The direct impact in terms of contracts concluded and their value is difficult to quantify because the companies do not want to provide the relevant information. The estimate by the SPX staff (supported by a number of examples) about the total number of contracts (about 50) is quite impressive but it was not possible to verify fully its validity and no information is available about the value of the contracts.

15) However, the indirect impact also needs to be considered. As confirmed by the visited companies, exposure of the companies to the requirements of foreign partners at international fairs, contacts with foreign and local companies established through the services of SPX and similar results of the SPX activities might have contributed to management decisions aiming at company performance or to contracts with partners concluded at a later date.

Sustainability

16) Operating the SPX as a commercial service or at least on a cost-recovery basis is not feasible at the present time in Jordan. Some of the companies might be ready to pay a small fee for information or a matchmaking service which results in a business contract but the general attitude of the industry stresses the developmental role of the Government and the need to support industry by Government-financed services.

16) The inclination of the companies to conceal business-related data may complicate any effort to introduce a result-oriented fee for the SPX service.

17) There is a possibility to introduce a small fee for participation at some seminars, at fairs, etc. However, such fees can cover only a small part of the costs.

18) In view of the above the SPX needs and will need a sponsor ready to cover most of the operating cost. The willingness of the Chamber of Industry to take over the SPX together with a long-term commitment to finance it is not clear. Under these circumstances, the decision of the Ministry to transfer the SPX to JEDCO represents an optimal solution. However, without an early implementation of the decision the SPX unit will not sustain.

Recommendations

1) The decision about the transfer of SPX to JEDCO should be implemented as soon as possible. The transfer should minimize the loss of the developed capabilities. It is assumed that the (two) staff to be transferred will be from the SPX unit. (As the personal knowledge of companies acquired through plant visits is the most important asset of an SPX, it is the opinion of the evaluation mission that transfer of at least three SPX staff would be more effective.) It is also important that the software and databases be transferred as well.

It is assumed that hardware (PCs) is available at JEDCO and that the unit will be granted operational autonomy to perform in a flexible manner. It is also assumed that the Steering Committee will be re-constituted.

2) Once the transfer is implemented, the SIS project should be completed. While the re-installed unit itself will be expected to specify the requirements for the use of the remaining budget under the project, it is recommended that the budget be used to support the following activities:

- elaboration of the mandate, strategy and plan of activities under the new institutional framework;
- installation of the new version of UNIDOSS and training of staff in its application;
- preparation of procedures, guidelines, manuals, standard forms, sample contracts and specimen letters related to SPX operations and their monitoring.

3) When elaborating the mandate, strategy and plan of activities the following recommendations should be considered:

- The SPX should focus on the promotion of the subcontracting concept and on the matchmaking activities themselves; cooperation with the Chamber of Industry should be established in order to use the Chamber's fora (seminars, Advisory Committees meetings, etc.) for promotional activities and to use the Chamber's knowledge of industrial sub-sectors to support the searching and matchmaking processes;
- the company database should be updated on a selective basis; companies with apparently low potential for subcontracting should not be updated;
- activities generating inquiries (organization of local fairs, visits to large plants/potential contractors, participation at international fairs) should be given preference over extensive and indiscriminate expansion of the companies database;
- organization of company participation at international fairs should be coordinated with the relevant units of JEDCO; the available organizational capacity of JEDCO should be used to support the administration of the preparatory work; the target countries should be diversified (to include Germany, UK);
- the SPX and the Jordan Investment Corporation (JIC) should define principles of cooperation; inquiries targeted at partnership/joint venture projects should be referred to JIC;
- the SPX should cooperate with specialized institutions and bodies in charge of the following programmes:
 - * quality assurance (total quality management, ISO 9000 certification)
 - * information on technology and markets

These programmes support and complement the subcontracting process. While the SPX does not have the capacity to run such programmes, it should be involved in their design and implementation. Good knowledge of the plants makes it possible for the SPX staff to contribute to better understanding and formulation of companies' needs when designing and/or managing the programmes. On the other hand the SPX staff should be acquainted in detail with the programmes in order to be able to advise companies on how to make use of the available sources of information, training courses, advisory services, etc.

Coordination of such programmes can be supported by appropriate composition of the SPX Steering Committee.

LIST OF PERSONS MET**MINISTRY OF INDUSTRY AND TRADE**

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