

at between \$12.4 billion and \$13.1 billion, an increase of about 6% over 1990, with sales of software and services representing more than half of the total. There are good opportunities in PC-related hardware (mainly peripherals and add-ons), particularly in data-communications (i.e., LAN and WAN products). Many brands of IBM-compatible PCs are already on the market. Sales of laptops made a slow start in the Netherlands, but are now growing.

Both hardware and software sales have seen decreasing growth in recent years; growth rates in 1993-1994 are expected to level off to between 1 and 3%.

Most software on the Dutch market is imported, mainly from the U.S., although the domestic industry is growing, and is particularly strong in the standard business package sector. Use of UNIX is growing rapidly, which augurs well for overseas suppliers of UNIX-based software and hardware. Opportunities also exist in specialized software (e.g., graphics and CAD/CAM, desktop publishing, expert systems). Documentary Information Systems (DIS), including optical data storage, and EDI are important growth areas, as are communications-related PC software and add-ons.

Strategic partnering possibilities exist in the areas of software development and GIS. Domestic GIS expertise is already highly developed, but there may be a useful complementarity between Canadian products (such as hardware and software for mapping large areas) and Dutch technologies (e.g., computer models for environmental monitoring and physical planning). There is a high level of GIS research and co-operation in the Netherlands.

About 90 Dutch companies will be exhibiting at CeBIT, and some 10 000 Dutch visitors are expected, making them the most numerous of all foreign visitors. \*

## SMALL COUNTRIES BIG OPPORTUNITIES

*It's not just the giants that are open for business.  
Many smaller countries also offer big rewards for exporters.*

### Belgium

With only 10 million people, Belgium accounts for 3.2% of international trade, and is the sixth-largest exporter in the EU. Nestled between two economic giants, France and Germany, Belgium is in one of the world's most industrialized and competitive regions.

The 1994 Belgian IT market is estimated at \$8.4 billion, with an annual growth rate exceeding 5.3%.

Some of the high-growth areas are telecom (7%), computer workstations (30%); and systems and network operations (16%).

Belgium imports much of its IT products and services, with import penetration of hardware at 32% and growing. In terms of GDP share and per capita expenditure, Belgium's IT sector is above the EU average.

Belgium is recognized by marketing experts as being the ideal test

## *New Opportunities in Central and Eastern Europe*

Prior to 1989, the centrally planned economies of central and eastern Europe were relatively isolated from state-of-the-art information technologies that abounded in the leading industrialized countries. Consequently the current IT markets of these economies are growing quickly as government organizations and enterprises strive for productivity improvements through office and industrial automation.

In the Czech and Slovak republics, the financial services sector is an area of particularly strong growth. The demand in the industrial sector will grow as the privatization process continues. Public utilities and hospitals also have major requirements for information systems.

The Central & Eastern European

Trade Development Division (RBT) of the Department of Foreign Affairs and International Trade will be organizing an Informatics Mission featuring computer hardware, software and related services to the Czech Republic and Slovakia immediately following CeBIT '94 (i.e., March 24 to 29, 1994).

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