

ARTS AND CULTURAL INDUSTRIES

The arts and cultural industries consist of the visual and performing arts; publishing; music; film and television production; and the emerging multimedia industry. Also included is a section on broadcasting and cable.

Main Challenges

- Since Canada's cultural imports still exceed its exports by a ratio of two to one, it is important to ensure that its cultural industries have access to a reasonable share of the domestic market by maintaining existing support measures (and even introducing new ones, where required).
- It is necessary to consolidate Canada's presence in the traditional markets of the United States and Western Europe, and establish a presence in the emerging markets of the Asia-Pacific region, Latin America and Central Europe.
- An emerging market for multimedia content is posing its own challenges and opportunities, both domestically and internationally. Here again, the main challenges will be to ensure that Canadian producers have access to the new distribution systems both domestically and internationally, and that limited access to financing for multimedia content does not prevent Canadian voices from having a significant presence on the information highway.
- Statistics on the arts and cultural industries (especially on their exports, foreign revenues and market share in key foreign territories relative to other competition) should be improved to evaluate the success of existing and new initiatives more efficiently.
- It is important to ensure that Canada's extensive network of missions abroad works effectively for the industries through knowledgeable, trained personnel who are equipped with an understanding of and access to information about Canada's cultural industries; are able to promote Canadian cultural goods and services; can gather market intelligence for Canadian companies; and can help them to make contacts with their counterparts abroad.

Strategic Direction

The government, in co-operation with the industries, will:

- continue to pursue an effective cultural advocacy campaign in the United States, Europe and at home to ensure that Canada's policies for cultural industries are understood and supported (Department of Foreign Affairs and International Trade [DFAIT], Department of Canadian Heritage [DCH]);
- ensure that participation in key international fairs, festivals and markets does not diminish but increases, wherever possible, since they offer an effective way to promote Canadian cultural products, gather market intelligence and establish contacts with foreign business partners (DFAIT, DCH);
- through development of appropriate training programs, ensure that Canada's foreign service officers and trade commissioners abroad are able to adequately promote Canadian arts and culture, and provide export assistance to Canadian companies (DFAIT, missions);
- consider extending export and financial assistance, and other support measures, to multimedia content to ensure that Canadian voices are not excluded from the information highway, and that the cultural industries can effectively compete in this important new market (DFAIT, DCH, Industry Canada [IC]);
- gather better statistics on this sector, especially with regard to foreign revenues and sales (DFAIT, DCH, IC, Statistics Canada).

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AUTOMOTIVE

The Canadian automotive manufacturing sector consists of two major industries: motor vehicle assembly and components production.

The sector produces a wide range of products for both Original Equipment (OE) and Aftermarket (AM) manufacturers. As well as passenger cars and light trucks, products include engines and major drive train components, steering and suspension parts, wheels and brake parts, stampings, seats, interior and exterior trim, electrical components and tires.

Main Challenges

The challenge for government is to maintain an industrial and trade-policy environment that fosters the development of the motor vehicle, parts and equipment industry; to ensure that Canada remains attractive to investors for manufacturing, technology development and research and development (R&D); to increase sourcing opportunities; and to increase trade.

The challenge for industry is to remain competitive in the face of ever-increasing competition and consolidation, as well as the gradual reduction of international tariffs and other trade barriers. Continued emphasis on improving productivity, quality and pricing, will ensure that the industry can meet the challenges that face it.

To increase trade with key automotive countries, it continues to be necessary to raise the profile of the Canadian industry. Government must ensure that key trading partners and the new emerging markets are aware of Canadian capabilities. Industry, when presented with opportunities, must be encouraged to pursue them.

Discrepancies in trade data and other statistics are being harmonized to improve effectiveness of analyses, and to provide fair and full comparability on a North American basis. Efforts should continue on the harmonization of emission and safety standards with other jurisdictions.

Ongoing strategic analyses, and timely dissemination and distribution of relevant information and intelligence, by all stakeholders, will assist business development.

Strategic Direction

The overall action plan for the sector is focussed on the following strategic elements.

Industry-Government Co-operation

The Automotive Advisory Committee (AAC) will undertake activities and analyses in collaboration with appropriate stakeholders on:

- continued streamlining and harmonization of trade data and other sector statistics on a North American basis with North American Free Trade Agreement (NAFTA) partners: ongoing (AAC/International Committee, Department of Foreign Affairs and International Trade [DFAIT], Industry Canada [IC], Automotive Parts Manufacturers' Association [APMA], Automotive Industries Association [AIA], Association of International Automobile Manufacturers of Canada [AIAMC], Japan Automobile Manufacturers' Association [JAMA]); and
- harmonization of emission and safety standards in North America: ongoing (AAC/Standards and Regulations Committee, Transport Canada [TC], IC, Environment Canada [EC]).

To improve automotive sector knowledge in Canada's trade missions abroad, a work plan will be prepared and implemented to increase dissemination and distribution of strategic auto-related intelligence and information to Canadian trade commissioners: ongoing (AAC/International Committee, DFAIT, IC, APMA, AIA, Ontario, Quebec).

The profile of the capabilities of the Canadian auto parts sector in developed and emerging markets will be raised through media promotion, preparation of "evergreen" sector-specific reports, a strong industry lead in international activities; incoming media missions from Japan and Europe; and outgoing missions where appropriate (DFAIT, IC, APMA, AIA, Ontario, Quebec).

To ensure that both OE and AM Canadian companies have full market access to all sourcing, trade and investment opportunities, regular bilateral and multilateral consultations will be undertaken with key players in Japan, Europe,