cluding computers and office equipment, machinery, and a variety of high-tech equipment.

Telecommunications: This sector offers excellent potential for outside suppliers, especially in view of the relaxation of national monopolies and the Single European Act which will open up the whole European market.

In the Netherlands, the restructuring process has already begun with the deregulation of the PTT's monopoly of the customer premise equipment market. By 1992, procurement of central office switch gear and transmission systems will be liberalized, conforming to the same rules on open procurement as all other public bodies. Manufacturers exporting customer premise equipment to Europe can base their designs on uniform telecom standards.

There have already been many Canadian successes in telecommunications in the Netherlands: Northern Telecom (SL-1 digital PABXs, high-quality telephone handsets, with prospects for sales of its Data Packet Network (X25) switch; Gandalf sales to PTT and the private sector; and other Canadian companies (voice mail equipment, facsimile switching equipment, and taxi dispatch systems); while others are aggressively pursuing opportunities in data acquisition and control systems.

Computer Hardware and Software: The total Dutch market for computer hardware, software and services in 1989 was estimated at $9 to $11 billion. Software sales represented nearly half that amount, and are expected to increase more rapidly than those for hardware.

In the area of computer hardware, as in other markets, the larger mini-computers are being replaced by increasingly powerful PCs. Many Dutch companies now work with a multiplicity of either stand-alone or network PCs. There are good opportunities for PC-related hardware, mainly peripherals, particularly in relation to the increasing degree of overlap between computers and data processing equipment.

The market for IBM-compatible PCs is well represented and therefore quite competitive. Sales of laptops are less strong in the Neth-

Canadian Export Opportunities

- Fisheries products
- Wood products, incl. lumber
- Equipment, systems and components for offshore exploration and production
- Automotive products (mainly aftermarket)
- Systems and components for aircraft
- Avionics and ground support equipment
- Office equipment
- Computer hardware and software
- Medical instruments and equipment
- Electronic components and test equipment
- Telecommunications equipment
- Datacom systems
- Safety and security products and equipment
- Pollution control systems and equipment
- Do-it-yourself products
- Sporting goods
- High-quality giftware

erlands, perhaps because of the high degree of "personal" PC ownership. Hardware sales have seen a decreasing growth rate in recent years, although the computing sector as a whole (including software) is still enjoying growth of 6 per cent a year.

Most software on the Dutch market is imported, mainly from the U.S., although the domestic industry is growing. Use of UNIX is growing rapidly, which augurs well for overseas suppliers of UNIX-based hardware and software products. Market opportunities also exist in specialized technical software (e.g. graphics and CAD/CAM, desktop publishing, expert systems).

Defence: In terms of major projects in this sector, the Netherlands is a member of the Independent European Group (IEPG) which publishes its military requirements and awarded contracts with a value of one million ECUs or more in regular bulletins.

The Dutch Ministry of Defence screens or prequalifies its potential bidders, and requests certain information about a company before it will be registered as a potential supplier. A company's reputation, financial status, and capabilities are usually verified, and enquiries may be made about past performance.

To register, a Canadian company must send a request to an Issuing Branch, at the following address: Ministry of Defence, Directorate-General of Material, DMLB/MVG/IEPG/Focal Point, Attn: Th J. de Grood, P.O. Box 20701, 2500 ES the Hague, Netherlands.

Projects or anticipated supply requirements of interest to Canadian companies include: local telecom networks (LTN) for the airforce, simulators, TACAN project, remote-piloted vehicles, sonars, minesweeper systems, NBC equipment, communications masts, small arms and ammunition, gas masks, as well as a variety of related components and electronic equipment.

Environment: The Netherlands is the most densely-populated country in the world, with a high level of environmental awareness. The Dutch spend 1.34 per cent of GNP on environmental protection, compared to 0.7 per cent in the U.S., and it is expected that Dutch industry will have to double its wastewater, sewage and soil treatment technology.

The size of the market has been estimated at $1.2 billion, covering equipment for water treatment, air treatment, noise reduction, soil treatment, chemical waste and non-chemical waste treatment. The total market including services (e.g. collection, processing) is estimated at $4.9 billion.

The relative strength for the local