

B) Perception of Canadian industry performance as supplier vs. other foreign competitors

The perception of Canadian remote sensing, GPS systems and GIS software is good. The recent development and marketing of RADARSAT's satellite imagery has reinforced this impression to Colombians in the geomatics field.

In the past, many leading Colombian geomatics firms have attended symposiums and workshops in Canada. Quite often, employees in geomatics related fields at public institutions such as DANE and IGAC have attended specialized training courses put on by leading Canadian geomatics companies and institutions in Canada.

Competitive advantage through Canadian government policies and initiatives

The Export Development Corporation (EDC) offers the following four lines of credit in Colombia:

Banco Cafetero (US\$10 million); Instituto de Fomento Industrial (US\$10 million); Banco Unión Colombiano (US\$ 3 million); Ecopetrol (US\$10 million).

EDC can provide medium or long-term support for purchases of eligible Canadian capital goods and services to creditworthy Colombian borrowers. EDC financing can be used to finance up to 85 percent of the value of the Canadian capital goods and services purchased from Canadian suppliers.

Canadian exporters are invited to contact the nearest EDC office in Canada for more information on the eligibility requirements for export financing or the Information Technology Team in Ottawa at 888-332-3777; fax: (613) 598-6697

Snapshot of competitors presence, advantages, and weaknesses

The strongest competition comes from the United States. The U.S. is very strong in the distribution of geomatics related software and hardware and has set up a number of strong distribution networks with leading Colombian distributors. They are the only other country that has set up licensing agreements, joint venture and strategic alliances with Colombian geomatics firms. However, the recent decertification of Colombia by the U.S. government has strained relations and also means that U.S. firms do not have access to US Eximbank financing. This puts them at a disadvantage compared to Canadian firms, which can access EDC. Financing however is not always the most crucial point in a project.

There is some influence from European geomatics software and hardware, but it is minimal. ILWIS GIS software from Holland has quite a presence in Colombia. The Swiss Government has a signed agreement with IGAC and has provided most of its geomatics hardware, although there is currently no presence of private Swiss geomatics companies in the country.