

market, while exploiting fixed satellite-based, overseas telephony markets;

- remote sensing, specifically co-ordinating Canadian efforts to sell RADARSAT data, image-processing systems and software, and value-added products and services;
- ground-segment equipment, in both communications and remote sensing;
- small satellites, assessment of the market for small satellites, suggested as a possible major growth area in the coming decade;
- space robotics as an enabling technology for widespread application to environmental clean-up and hazardous-waste handling, defence, medicine and education.

The Interdepartmental Working Group on International Trade in Space Products was created in 1993 to provide greater co-ordination of export-marketing activities among federal government departments, with provincial governments, and between government and industry. All interested federal departments and agencies and Canadian space companies are encouraged to participate in the Working Group. Provincial interests are represented by the Atlantic Canada Opportunities Agency (ACOA), the Federal Office of Regional Development-Quebec (FORDQ), the Western Diversification Office (WDO), and the Ontario government.

Based on their estimates of market growth, Canadian prospects, access considerations and market size, a group of the largest Canadian space companies suggested a market emphasis as follows: The industry group felt that the United States, Europe and Japan, as the largest, most diverse, and most technologically advanced markets, continue to be of primary importance. Additional effort beyond historical levels, is however unnecessary at this juncture. Three new growth areas were identified as requiring extra marketing effort and government attention: China, Russia/Eastern Europe, and the Pacific Rim countries (the Republic of Korea, Thailand, Singapore, Taiwan, Indonesia, Malaysia, Viet Nam

and Hong Kong). Other regions of lesser, though important, market interest are Mexico and Latin America, and the Middle East. Regardless, expanded involvement with national space authorities in all countries remains a priority.

A better comprehension of the United States as both the dominant supplier and market for space products and services is an important component in the normal development of a space-market strategy for Canada. Development of such a market strategy is a priority for the Canadian space community, in particular the Working Group, for the next year. As a first step in the development of this strategy, the Department of Foreign Affairs and International Trade (DFAIT) is funding a study of the U.S. space market.

Government activities dominate space markets worldwide. This suggests a strong role for the Canadian government in assisting industry with market development and trade promotion, in particular with foreign governments. Broad-based trade promotion activities abroad can be carried out under a "Team Canada" umbrella, with the Canadian Space Agency (CSA) as team captain, supported by other departments such as DFAIT and Industry Canada (IC).

To maximize the impact of limited public and private resources, Canadian involvement in trade fairs and missions in the space sector will be focussed and organized with careful selection of a small number of high-profile promotion activities directed at specific markets with specific objectives. Small- and medium-sized enterprises (SMEs) will be consulted and encouraged to become involved. The Canadian Space Industry Capabilities Guide will be updated as an information source and a promotional tool.

In addition to these broad-based promotion initiatives, the Government, in particular the CSA, IC and DFAIT, along with the DFAIT network of trade missions abroad, can provide a valuable service to individual firms in their pursuit of specific overseas contracts. The CSA, for example, through its co-operation with other