

CBEF has been successful in strengthening Canadian presence in the Asia Pacific markets, as well as increasing Canadian awareness of trade opportunities there, and improving Canadian competence in these markets. This has already translated into a situation where Canada's sales of beef and market share in Japan have increased. The ACBC is unlikely to have increased Canadian presence or improved Canadian competence, however it has contributed to Canadian awareness of trade opportunities. The Japanese import specialists have contributed to a greater Canadian presence and trading competence in the Asia Pacific markets (JETRO reports sales so far by 11 companies of \$2.4 million), but have had little or no effect on increasing Canadian awareness of trade opportunities;

- the CBEF has been a successful collaborative effort by a large number of players who have worked well as a team, with the main impetus coming from the private sector. The largely Pacific 2000 funded ACBC has a role which is perceived to duplicate or overlap with other organizations, some of which are at least partially funded by DFAIT and/or CIDA and provincial governments. The Japanese import specialist role is unique, and there is little or no possibility of duplication so long as the role remains restricted to "tailored" guidance of Canadian firms.

the delivery of the PBS has been found to be effective in some areas, but there is room for improvement:

- the turn around time for funding submissions is very good (4 to 5 weeks);
- officers are pragmatic and take a flexible approach;
- opportunities for greater coordination with other government departments exist;
- DFAIT needs to continue to work with the private sector to identify priorities jointly;
- the identification process for priority sectors should be further refined to the level of specific market niches;
- organizations funded by the PBS have not taken full advantage of the APFC business programs;
- formal project monitoring is inconsistent, and limited to financial reporting. Information sharing about what works, and what does not, is critical to the success of the program.

In summary it is observed that strategic, focussed approaches within niche markets, where the private sector has played a leadership role, are where the PBS has achieved its greatest success. Ultimate success in the Asia Pacific market requires patience, money, and persistence. To ignore this market and not have in place an effective program that provides assistance to Canadian exporters would put at risk Canada's present position in the market, and ultimately reduce Canada's chances of success in the world's fastest growing economic region.