

C. Government

Government has played a limited role in the development of the Valley. Initially government was a large customer for chips. Now it accounts for less than 10% of the electronic parts sold out of the Bay Area.

CONDITIONS OF ACCESS

There are almost no restrictions to Canadian firms participating in most of the research programs at most of the sites listed above.

Patent protection has little if any impact. Most local firms figure that they have to protect themselves by winning market share. Technology moves too fast for patents to be much protection. In biotechnology patents may be more of a factor due to the longer lead times for products to receive FDA approval.

TECHNOLOGICAL OPPORTUNITIES FOR CANADIANS

California is the centre of research in so many areas of interest to Canada that it is almost impossible to list them all. Aside from the vast potential offered by microelectronics, from its huge agricultural base, California funds biotechnology research that will have a great effect on Canadian agriculture. Other major efforts include the mapping of the Human Genome, a project estimated to be equivalent to going to the moon in its complexity.

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2.1.6 Seattle (Northwest USA)

The overall economic outlook for Seattle post territory of Alaska, Washington, Oregon and Idaho continues to be positive in particular greater Seattle and Portland. The foundation for this strong economy is Boeing's growing backorder of commercial aircraft worth \$85 billion today; expanding software development houses in particular Microsoft; diversifying forestry companies such as Weyerhaeuser; expanding Japanese investment in high technology manufacturing facilities in Portland which number 71 companies today and decreasing levels of unemployment. No figures are readily available on R&D expenditure in territory, however, given the nature of two of the principal businesses in the territory (aerospace & software development) it would be above national averages. Also, above national levels would be the number of engineers, scientists and technicians. For example, Boeing has 15,000 engineers and 13,000 technicians on its payroll.

TECHNOLOGY TRENDS

Today, the technology industry in the Pacific Northwest is strongly backed by government, educational and industrial leaders. This support has contributed to the necessary ingredients for a bright future, including an existing critical mass of "home grown" technology companies with world-wide reputations, technology centers of excellence like the Technology Corridor in Washington and Oregon Center for Advanced Technology Education, strong technology centers in the leading universities and a highly trained work force. The future growth in the technology industry in the Pacific Northwest will come from three principal areas: expansion of existing companies, spin-offs from existing companies and relocation of established companies to territory particularly from Japan. Published figures state the technology work force in this territory will grow by 50% in the next 20 years.