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# *Canadian*

E X C E L L E N C E

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TRANSPORT

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ENERGY

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TELECOMMUNICATIONS AND  
INFORMATION TECHNOLOGIES

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FINANCIAL INSTITUTIONS

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AGRI-FOOD

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ENVIRONMENT

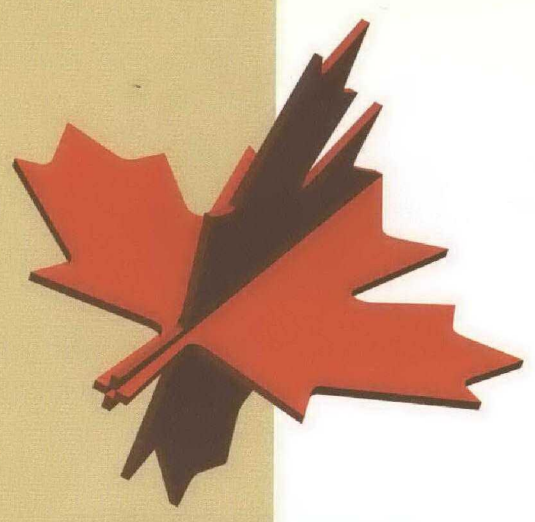
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EDUCATION



Canada

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# Canadian

E X C E L L E N C E

INTERNATIONAL AFFAIRS  
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*Canadians have built a powerful, modern economy. We are connected by steel and micro-fibre, asphalt and satellites. We are united by a determination to forge stronger international trade and investment partnerships. Canadian governments and our business community are working as Team Canada to ensure that Canadian excellence meets international requirements.*

**Jean Chrétien**  
PRIME MINISTER OF CANADA



T a b l e o f C o n t e n t s

	<b>FOREWORD</b>	<b>3</b>
	<b>INTRODUCTION</b>	<b>5</b>
	<b>TRANSPORT</b>	<b>6</b>
	<b>ENERGY</b>	<b>12</b>
	<b>TELECOMMUNICATIONS AND INFORMATION TECHNOLOGIES</b>	<b>16</b>
	<b>FINANCIAL INSTITUTIONS</b>	<b>22</b>
	<b>AGRI-FOOD</b>	<b>26</b>
	<b>ENVIRONMENT</b>	<b>30</b>
	<b>EDUCATION</b>	<b>34</b>
	<b>CANADIAN TRADE COMMISSIONER SERVICE ABROAD</b>	<b>38</b>



**F**OREWORD

Canadians have built a reputation around the world for outstanding products and services. Our customers know that we produce what they need, and we deliver it on time and according to the highest-quality standards.

We tackle the challenges and demands of economic growth. Our companies specialize in building and installing the facilities, systems and networks that make economies not only work, but work efficiently and cost-effectively.

We build transit systems, construct roads and even move payloads around outer space. We are leaders in oil and gas production and electricity generation. Our telecommunications networks and computer software are unsurpassed in their capacity to move and process information: the lifeblood of the global economy.

Canadians are pioneers in environmental services that protect and restore air, land and water resources. In food production and processing, Canadian firms span the market, from breeding stock and cooking oils to smoked salmon and ice wine.

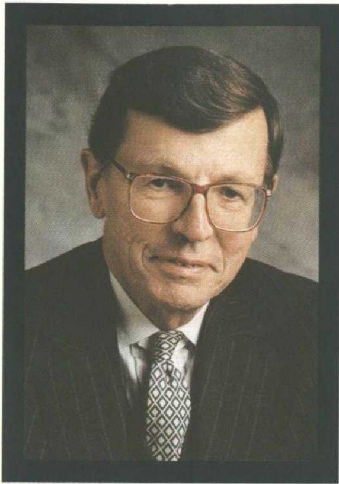
Our strong financial institutions offer a host of reliable services worldwide to help individuals to save and invest and businesses to grow. And the doors of our colleges and universities are open, ready to extend to international scholars the top-quality education enjoyed by Canadian citizens.

In building a powerful, modern economy, Canadians know that success depends on resourcefulness and imagination.

I invite you to consider Canadians' goods, services, expertise and willingness to adapt their methods to the job at hand. Canadian firms are ready to form partnerships, joint ventures or strategic alliances to put Canadian excellence to work — at home and abroad.

The Right Honourable Jean Chrétien  
PRIME MINISTER OF CANADA





## I NTRODU CTION

Canadian businesses are successful players in the international marketplace. Canada now exports more on a per capita basis than any other country in the world. Exports continue to grow at unprecedented rates, now accounting for more than one third of our gross domestic product compared to one quarter five years ago.

*Canadian Excellence* outlines the strength and competitiveness of Canadian capabilities in seven sectors: transportation, energy, telecommunications and information technologies, financial services, agri-food, environmental industries and education. These are among Canada's top-performing sectors, though they by no means represent all our areas of success. Canadians also excel in mining, construction and architecture, to name but a few additional sectors of Canadian expertise.

Our companies bring more to the table than good products and services — they bring a willingness to adapt their products and services to meet specific customer needs, to transfer technology and to form strategic alliances. They can provide training and help develop creative and lasting business partnerships. In summary, Canadian businesses make good partners.

Canada is also an excellent place to invest. It has one of the most open and competitive business environments in the world. Canadian firms have access to the large North American market and excellent sources of supply. Many multinational firms have awarded North American or global mandates to their Canadian subsidiaries. Our cost competitiveness is at its highest level in decades. Canadian productivity has surged in recent years.

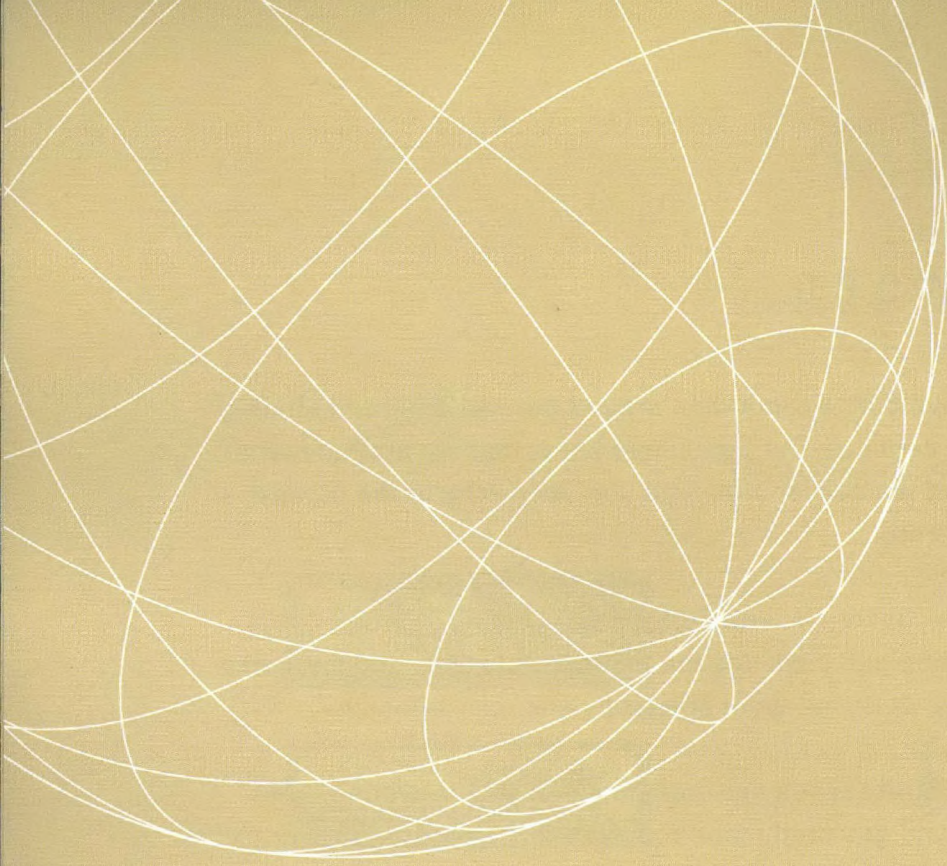
*Canadian Excellence* should help you gain a greater appreciation of the breadth of Canadian expertise and the possibilities of partnerships with Canadian firms.

I encourage you to consider what you can achieve in your market by teaming up with Canadian companies. Contact our Canadian Trade Commissioners located at more than 125 offices around the world (see list on pages 38 and 39). They would be pleased to help you identify and contact potential Canadian partners. They are experienced hands at putting Canadian excellence to work to our mutual benefit.

The Honourable Roy MacLaren

MINISTER FOR INTERNATIONAL TRADE





**Team Canada** \* **Équipe Canada**





The first bond of Canadian nationhood was a transcontinental railway built across this huge and rugged country late in the 19th century. Since then, efficient, reliable transportation has been a priority. To be competitive, Canadians have had to develop transportation systems and vehicles that move people and goods quickly, cheaply and safely, over long distances, in all kinds of weather.

Necessity has created first-rate capability. Canada now has more kilometres of road and railway track per person than do most other countries, including the United States. Intermodal passenger systems, including subways, buses or commuter rail lines, exist in every major city. The Trans-Canada Highway, completed in 1962, is the longest national highway in the world at 7,775 km.

Canadians have remained at the forefront of developments in transportation throughout the 20th century. They have developed the most automated light-rail and subway vehicles available. Canadians have designed new transportation systems accessible to seniors and travellers with disabilities and have developed transit buses that operate on natural gas. Just as important, they are hard at work developing solutions for the transportation challenges of the 21st century.

**CANADA  
CAN PROVIDE THE  
ELEMENTS THAT  
MAKE AN URBAN  
TRANSIT SYSTEM  
SUCCESSFUL.**

## LAND TRANSPORT

### Rail and Urban Transit

In 1994, the rail and urban transit sector of Canada's transportation industry shipped approximately \$2.2 billion worth of goods, of which more than 70 per cent was destined for foreign countries. The U.S. market is Canada's top customer, but countries in Asia and Latin America have shown an increasing interest in Canadian capabilities. Canadian sales to non-U.S. markets have increased significantly since 1993, particularly through the design, engineering and construction of ready-to-operate transit systems.

Some major products offered by the Canadian industry include:

- RAIL ROLLING STOCK: PASSENGER AND FREIGHT,
- TURN-KEY PASSENGER RAIL SYSTEMS,
- BUSES: LARGE TRANSIT BUSES; LOW-FLOOR AND ALTERNATE-FUELLED BUSES; INTERCITY COACHES AND SCHOOL BUSES,
- DIESEL LOCOMOTIVES: D-C AND A-C TRACTION,
- SIGNALLING AND COMMUNICATION SYSTEMS,
- ADVANCED TRAIN-CONTROL SYSTEMS.

Canadian companies export far more than the vehicles on which urban transit systems are based. With showpiece urban transit systems in Canada, Turkey and the United States and work under way in Malaysia, Canada can provide the elements that make an urban transit system successful – including Canadian experience.

The Canadian automotive industry is the sixth largest in the world. It is Canada's largest manufacturing sector and most prolific exporter. The total value of shipments in 1994 was \$65 billion of which 95 per cent was exported.

This sector is fully integrated and rationalized on a North American basis. Many best-selling vehicle models in North America are made in Canada. U.S. car and truck manufacturers depend on Canadian-made parts. These are manufactured in Canada because Canadian companies deliver superior quality at reasonable costs.

While the United States imports new vehicles from Canada, many overseas customers are more interested in Canada as a source for replacement parts, accessories, and service and repair





equipment. Canadian aftermarket sales and services were valued at \$21 billion in 1994. Canadian firms specialize in garage, repair and diagnostic equipment. Canada also has an extensive tool-and-die sector.

Canadian manufacturers are essential to the highly successful North American automotive industry. Canada's expertise is widely understood and utilized in the United States. Many other countries, including Japan, also appreciate that the Canadian automotive industry is a place to buy and a place to invest. Japanese automaker Toyota recently opened a new engine plant in Canada and has announced plans to expand its current assembly plant to a full-scale production plant. Honda also has a major production facility in Canada.

#### AEROSPACE AND DEFENCE EQUIPMENT

The Canadian aerospace and defence industry has made an important international contribution in several specialized sectors. Canadian firms are busy increasing the number of areas in which Canada enjoys a world-class reputation.

Television viewers around the world have seen astronauts doing intricate manoeuvres outside their spacecraft with the famous Canadian-built robot arm, the Canadarm. This is only one example of Canadian aeronautic success.

Other examples include:

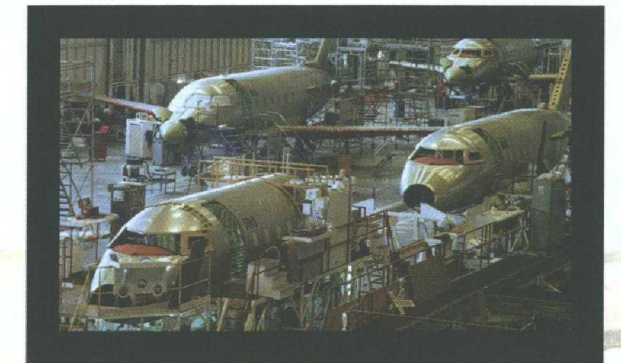
- *Bombardier, the parent company of Canadair and de Havilland, is a major Canadian-controlled global aircraft manufacturer. It has the world's largest market share of deliveries and orders for 30- to 50-seat turboprops and jets. The company has achieved particular success with the Canadair Regional Jet and the new, longer-range, enhanced version of the Challenger Business Jet, the Challenger 604. A new high-speed, 70-seat turboprop, the Dash 8 series 400, was launched in June. A new long-range executive jet, the Global Express, is expected to be available within a year.*

**CANADA'S  
AEROSPACE  
INDUSTRY IS THE  
SIXTH LARGEST IN  
THE WORLD. WITH A  
GLOBAL REPUTATION  
FOR EXCELLENCE,  
SERVICE AND THE  
HIGHEST QUALITY  
STANDARDS,  
AEROSPACE  
AND DEFENCE  
HAVE GROWN TO  
AN ANNUAL  
\$11.5 BILLION  
INDUSTRY IN  
CANADA. ABOUT  
70 PER CENT OF ALL  
PRODUCTION IS  
EXPORTED.**

- *Bell Helicopter Textron (Canada) designs and manufactures Bell Textron's entire line of civilian helicopters, sales of which account for 50 per cent of the international market. A new Bell 430 intermediate and Bell 407 light helicopter are being developed.*

- *Pratt & Whitney Canada has a 30-per-cent share of the world market for small gas-turbine engines, which power the world's fleet of regional aircraft, military trainers and helicopters.*

- *CAE Electronics Ltd. is the world's leading designer and manufacturer of sophisticated commercial and military aircraft flight simulators and training devices. These simulators feature the latest technology in areas such as digital motion, control loading and sound systems.*



Canada is particularly well known for its training capacity. Several firms specialize in fields such as flight simulation and air traffic control, diagnostics and pilot training. Canada also provides other training and consulting services in air navigation, aviation meteorology, and airport planning, design, operations, maintenance and management.

Canadian defence firms have developed subsystems and components for specialized markets in which they are – or soon will be – world leaders. Canada is particularly competitive in light armoured vehicles, marine systems and platforms, informatics, aircraft upgrade programs, precision optics, robotic systems, explosive and narcotics detectors, shipboard systems acoustics, communications systems, helicopter haul-down systems and avionics.

In recent years, most Canadian defence firms have diversified their production so they have commercial as well as military applications, increasing their export potential and their ability to survive defence budget cuts.

#### SERVICES

Canadian-manufactured and Canadian-designed transit and aeronautics systems are highly regarded by transportation experts around the world. So are Canadian transit consultants. These consultants – who have gained expertise by overcoming transportation problems in Canada's wide and difficult terrain – provide insight and assistance to clients around the globe.





Areas of Canadian consulting expertise include:

- AERONAUTICAL ENGINEERING AND SPACE TECHNOLOGY,
- SEA PORT AND AIRPORT DEVELOPMENT, MAINTENANCE AND MANAGEMENT,
- TRANSPORTATION, SYSTEMS AND ELECTRICAL ENGINEERING,
- TRANSPORTATION PLANNING,
- TRANSIT MANAGEMENT,
- POLICY DEVELOPMENT,
- FISCAL PLANNING,
- RAPID TRANSIT DESIGN,
- COMMUTER RAIL SYSTEMS,
- URBAN BUS SYSTEMS,
- DESIGN AND OPERATION OF MULTI-MODAL TERMINALS,
- PRICING AND INFORMATION SYSTEMS,
- OPERATING AND MAINTENANCE STRATEGIES,
- DESIGN AND CONSTRUCTION OF RAIL PLANTS,
- ENVIRONMENTAL ASSESSMENT STUDIES,
- COMMUNICATIONS AND DATA COLLECTION,
- SYSTEMS FOR THE ELDERLY AND DISABLED,
- HEATING AND AIR CONDITIONING.

Canadian consultants are at the forefront of the international market for services such as the development and application of management information systems, intermodal operations, supervision of rail construction and locomotive rehabilitation programs.

Canadian-made equipment is installed at airports around the world. Canadian firms have provided experts in air traffic control, airport management systems, meteorology, and in the architecture, engineering and construction of airports in many countries. Canada's capabilities for sea port development range from sophisticated modern container terminals for general cargo to specialized single-purpose installations for the handling of bulk commodities and vessel-traffic management systems.

## THE FUTURE

One of the ironies of economic development in the 1990s is that many of the countries that have demonstrated the greatest potential for growth cannot realize that potential fully because of transportation tie-ups.

## STAKEHOLDERS IN CANADA'S TRANSPORTATION INDUSTRY HAVE COME TOGETHER TO HARNESS ADVANCED TECHNOLOGIES.

In some countries traffic gridlock is common, costing all sectors of the economy time and money.

Canada continues to develop technology and systems that help make all types of transportation move more quickly and reliably. The development of advanced, intelligent systems that apply computer, communications and sensor technologies to transportation problems has been under way in Canada since the early 1980s.

In recent years, leading private and public-sector stakeholders in Canada's transportation industry have come together to formulate a strategy to harness advanced transportation technologies and to address the safer, speedier and more reliable movement of all kinds of traffic.

Provincial transportation ministries, federal research and program organizers, municipal agencies, leading transport operators (truck, transit and rail), consultants, universities and colleges are contributing to the development of high-tech solutions.

These groups have formed a national committee now known as Intelligent Transportation Systems Canada (ITS Canada). The stakeholders in ITS Canada have several action plans in place to further the design and application of advanced ITS technologies.

These technologies have already led to improved traffic management in congested urban areas, better compliance with weight and other safety regulations on commercial vehicles, and the minimization of waiting time at weigh-stations and border crossings. They have led to automatic toll collection systems that no longer require commercial vehicles to stop on toll roads.

The improved management of all kinds of vehicle fleets – including taxis, ambulances, and vehicles used by police, utility companies, governments and the military – has led to cost reductions and improved consumer service on a massive scale. Early warnings of possible road hazards have led to a reduction in fatalities and property damage.

No country can maximize its growth potential if it cannot move goods and people quickly and safely. Canada has had considerable experience in transferring ITS technology to other countries. Canadian firms have already established many international partnerships to facilitate such technology transfers and are looking for more.







— Canada is a land of vast energy reserves, from hydroelectric power to tar sands, from huge natural gas deposits to a unique nuclear capacity. Canada has become a leader in the multifaceted field of energy development. Canadians have designed, built and now operate a huge network of pipelines — including the world's longest petroleum pipeline and a natural gas pipeline system that supplies 45 per cent of North American natural gas requirements. Canada's private-sector and public utilities are working with partners around the world to develop and upgrade their power systems.

## OIL AND GAS

The world's first oil well was drilled in the Canadian community of Oil Springs, Ontario, in 1857. Before long, Canadians who had helped develop Canadian petroleum resources were exporting their expertise to other countries. For more than a century Canada has been working with other countries to develop oil and gas reserves. Now Canadians are also applying their technological, financial and managerial expertise in transmission and distribution in places as diverse as Argentina, Malaysia and Australia.

**A HIGHLY TRAINED  
CONTINGENT OF  
CANADIANS IS  
ACTIVE IN EVERY  
AREA OF OIL AND  
GAS EXPLOITATION.**

Efficient exploitation of oil and gas reserves depends upon keeping up with the rapid pace of technological change in the industry. Canada is at the forefront of the latest developments in enhanced recovery techniques and oil sands extraction.

Canada offers a variety of machinery and services used in exploration, drilling, servicing, producing and processing. Canadian exports include geophysical prospecting equipment; drilling rigs and ancillary tools; pumping machinery; cementing and well-fracturing units; field processing components such as dehydrators, separators and treaters; and driller and processing equipment for offshore drilling platforms.

Canadian firms also have first-rate servicing capabilities, particularly in pre-drilling exploration and preparation, drilling services (mud, cement, logging, testing, coring and fishing), and well-completion services (perforating and stimulating).

More than 1,500 Canadian firms operate internationally, offering other countries the opportunity to increase efficiency and develop new capabilities. A highly trained contingent of Canadians, from top-level managers and professionals to skilled workers, is active in every area of oil and gas exploitation. Engineers and consultants can assess the commercial viability of oil and gas reserves and the means to improve the production of existing projects. Canadian companies can help build and operate sophisticated pipelines over long distances and can also help gather, process and market natural gas and petrochemicals.



In 1994, foreign customers bought Canadian equipment and services worth approximately \$1.2 billion — eight times the level of exports recorded only eight years earlier. These sales have been supported by the willingness of Canadian firms to transfer technology, provide training and offer reliable after-sales services.



Joint ventures are a Canadian specialty, born of the necessity to tackle large projects drawing on many sources of capital. Canadian companies have established foreign subsidiaries and joint ventures in diverse markets such as the United States, Europe, India and Southeast Asia.

Canadian companies will manufacture equipment such as drilling rigs and field processing units at home or abroad to suit local requirements. They also have a worldwide network of agents, distributors and service companies to ensure that parts and services will be readily available to overseas customers.

Canadian companies are world leaders at developing specialized equipment related to three characteristics of Canada's petroleum resource base: an abundance of sour gas, heavy oil and oil sands deposits. Specialized equipment for extracting oil from tar sands and gathering and treating sour gas is currently being exported to India, the People's Republic of China, Russia, Azerbaijan and Kazakhstan.

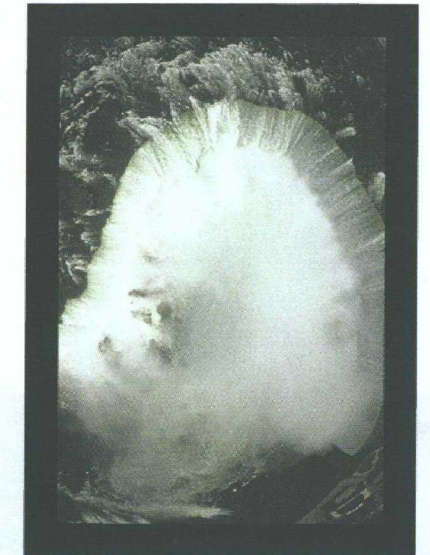
Canadian expertise also extends into the areas of primary and secondary recovery of conventional oil. Canada has a well earned reputation in the fields of advanced fracturing technology, as well as directional and horizontal drilling for the recovery of oil and gas from difficult formations and depleted wells. Top motor drives, software products, computer-controlled automatic coring devices and automated pipe-handling systems are all areas in which Canadian firms have made significant advances. Much of this technology and many new techniques have been developed in co-operation with overseas customers.

### ELECTRICAL POWER

Canadians have developed a wealth of knowledge and experience in building systems that generate, transmit and distribute power. They have designed, built and operated some of the world's largest and most complex electrical projects, such as the James Bay and Niagara Falls projects in Canada. Canadian consulting engineers, government utilities, private manufacturers and construction firms are working in more than 70 countries around the world. Canadians are sought after partners because they are not only experienced and have the latest equipment and technology, but also because they are willing to transfer that technology.

**CANADA, THE  
WORLD'S LARGEST  
PRODUCER OF  
HYDROELECTRIC  
POWER, IS ALSO  
THE THIRD-LARGEST  
PRODUCER OF  
ELECTRICITY FROM  
ALL SOURCES.**

Canadian utilities specialize in generation technologies for hydro, nuclear and conventional thermal power and are regarded as international leaders in AC and DC transmission lines and long-distance and high-voltage transmission. Canada is a vast country and its utilities have had to develop innovative transmission systems that operate efficiently and reliably in extreme heat, cold and high humidity. Canadian firms are innovators in the development of technology and systems that save energy, improve efficiency and control emissions.



Canadian power companies are competitive in all areas related to generation, transmission and distribution equipment, and professional services. Canada specializes in the design and construction of highly engineered, high-technology specialty equipment, including custom-designed hydro turbine generators, power boilers, gas generators and nuclear reactors.

The Canadian power industry exports more than \$2 billion in goods and services annually to customers in countries such as China, Indonesia, Israel, Egypt and Venezuela. Canada's leading exports include:

- EQUIPMENT FOR HYDRO, THERMAL AND NUCLEAR GENERATING STATIONS,
- POWER TRANSMISSION AND DISTRIBUTION EQUIPMENT,
- ELECTRICAL WIRE AND CABLE PRODUCTS,
- POWER AND DISTRIBUTION TRANSFORMERS,
- CONTROL AND PROTECTION EQUIPMENT,
- POWER-CONVERSION EQUIPMENT,
- CO-GENERATION, MINI HYDRO STATIONS AND REMOTE LOCATION POWER GENERATION,
- CONVENTIONAL AND ADVANCED TECHNOLOGY BATTERIES,
- FUEL CELLS.



# Telecommunications and Information Technologies

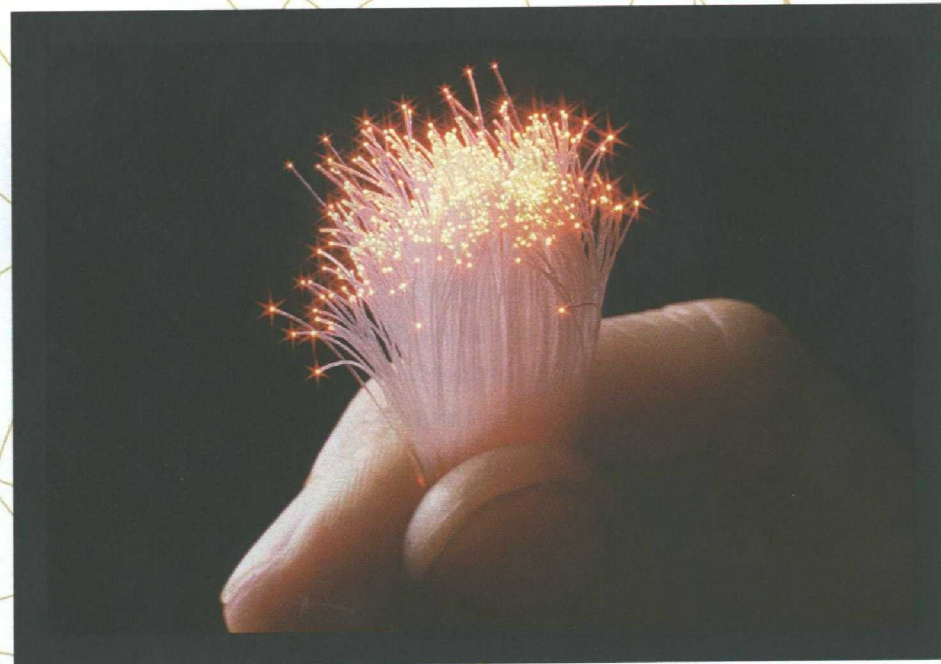


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COVER TO COVER DESIGN  
CORPORATION

Staying on top of information and telecommunications technologies is essential to building an infrastructure that makes countries competitive in international markets. Working from a sophisticated base in Canada, Canadian companies have helped upgrade information and telecommunications systems around the world.

Canadians have been setting the pace in some of these industries for more than a century. The very first telephone call was placed in Canada by Alexander Graham Bell, the inventor of the telephone. Canadian information and telecommunications companies have built on these kinds of historical achievements. They have remained innovative and cost-efficient. They continue to win large numbers of foreign contracts, many of them in highly competitive U.S. markets.

One need only look at a map to see that improvements in Canada's communications systems have had to overcome challenging geography and climatic extremes. They have done that successfully. Canada's recent telecommunications breakthroughs have coincided with advances in information technologies that include software products, computer services and new media, geomatics products, computers, peripherals and instrumentation, and electronic components.

## TELECOMMUNICATIONS

In 1994, the U.S. Mesa Research Group concluded that Canada ranked first in both the comprehensiveness and quality of its telecommunications systems when compared to five other countries: the United States, Japan, the United Kingdom, Germany and Singapore.

Canadians are very demanding about the scope and quality of their telecommunications capacity – 99 per cent of households have telephones (Canadians are the heaviest users of telephones in the world) and 92 per cent have access to multiple television channels through cable networks. Companies in Canada are active around the world in countries such as the United States, Britain, Brazil, China, Thailand and the Philippines, installing the same kinds of efficient communications networks that Canadians have come to depend upon.

Recent Canadian telecommunications "firsts" have included:

- THE WORLD'S FIRST DOMESTIC DIGITAL MICROWAVE NETWORK (1971),
- THE WORLD'S FIRST NATIONAL GEOSTATIONARY SATELLITE (1972),
- THE WORLD'S FIRST PACKET-SWITCHED NETWORK (1972),
- THE WORLD'S LARGEST CONTIGUOUS CELLULAR NETWORK (1990),
- THE WORLD'S LARGEST POINT-TO-POINT AUTOMATED TELLER MACHINE (ATM) NETWORK (1993),
- THE WORLD'S MOST COMPREHENSIVE FIBRE-OPTIC NETWORK (1994),
- THE WORLD'S MOST POWERFUL GEOSTATIONARY MOBILE COMMUNICATIONS SATELLITE (1996).

More than 90 per cent of Canada's telephone network has already been digitized. Coast-to-coast fibre-optic networks provide a full range of commercial services as well as the necessary bandwidth required to develop and test tomorrow's high-speed multimedia services.

**CANADA'S  
TELECOMMUNICATIONS  
SYSTEMS PROVIDE A  
WIDER ARRAY OF  
SERVICES TO A  
BROADER BAND OF  
CUSTOMERS THAN IS  
AVAILABLE IN ANY  
OTHER COUNTRY IN  
THE WORLD.  
VIRTUALLY EVERY  
HOUSEHOLD IN  
CANADA IS  
CONNECTED.**





Stentor, Canada's alliance of nine major telephone companies, recently announced that it will spend more than \$8 billion over the next 10 years to upgrade Canada's local and long-distance networks in interactive, two-way broadband capacity.

When complete, 80 to 90 per cent of all businesses and homes in Canada will have access to the multimedia traffic lanes and technologies of the Information Highway. Canada's goal is to build the highest-quality, lowest-cost information network in the world. Immense potential exists in all information and telecommunications subsectors for collaborative research and development and for joint ventures and international alliances between Canadian and foreign companies.

In 1994, Canada sold \$6.4 billion in telecommunications equipment, mostly to customers in the United States, China and the United Kingdom. Canadian companies specialize in several areas of telecommunications, including switching systems, broadband and multimedia products and services, fibre-optic cabling, rural communications, design and application of submarine cable systems, satellite networking, computer telephony integration and mobile and cellular phones. There are very few areas of telecommunications and information technology in which Canadian companies are not at the forefront of development.

The willingness to form strategic alliances and transfer technology is an essential feature of a good partner. Many joint trade and investment opportunities have been realized after representatives of other countries visited Canada through the Telecommunications Executive Management Institute of Canada education program. The world is moving toward

**THERE ARE VERY FEW AREAS OF TELECOMMUNICATIONS AND INFORMATION TECHNOLOGY IN WHICH CANADIAN COMPANIES ARE NOT AT THE FOREFRONT OF DEVELOPMENT.**

more open economic systems that welcome healthy competition from abroad and joint enterprise within their own borders. Canada itself welcomes both competition and outside investment.

The Canadian Radio-television and Telecommunications Commission (CRTC) has effectively opened local telephone service to competition from all suppliers, including cable companies, resellers and wireless providers. Telecommunications companies can now provide new information and multimedia services, such as home banking and shopping, distance education and telemedicine.

Canadian companies have worked with state enterprises in countries such as Malaysia to find the best way to open their own systems to lower costs and to increase efficiency. Often, they have provided the feasibility and viability studies and then assisted in the development of working systems.

## INFORMATION TECHNOLOGIES

Canada's exports of information technology products (including computers, consumer electronics, peripherals and horizontal software products) are growing and Canadian firms have begun to record strong performances in several sectors of this industry.

Software products and geomatic solutions are two areas in which Canada has had considerable success. This growing Canadian capacity is attracting offshore investors and companies in search of North American alliances.

The software products and computer services industry has grown rapidly in Canada. Revenues of the top 100 software products companies grew in 1994 by 38 per cent to \$1.5 billion of which 62 per cent was derived from exports. Revenues of the top 50 service firms grew by 25 per cent to \$3.9 billion. Many of these companies have formed strategic alliances with foreign partners to enhance distribution and foster product development.





Canada has established leading positions in specialized markets such as graphics and geographic information systems (GIS) software; multimedia communications; school administration; systems development; and information technology management, methods, hardware and manufacturing.

In the field of multimedia applications, Canadian firms are supplying specialized markets in the fields of animation, three-dimensional simulation, facsimile and photo applications. The United States is the largest foreign market for Canada's software and new media industries, but Canadian companies are quickly building international alliances in places such as the United Kingdom, Brazil, Peru, Norway and Singapore.

The field of geomatics or remote sensing is an area in which Canada has become a strong international competitor. Geomatics involves the acquisition, storage, analysis, distribution and management of geographically referenced information. This technology can be applied by both private and government users to manage information on natural resources — such as forestry — the weather and tax collection. The Canadian government has encouraged co-ordinated partnerships between the private and public sectors in this field. Canadian industry-government consortia have recorded successes in winning projects in Mexico and Saudi Arabia.

## THE SPACE INDUSTRY

There are now more than 150 Canadian firms involved in the space industry. In 1994, they sold over \$700 million in goods and services of which nearly half was exported. The Canadian space industry exports a larger proportion of its total production than do any of its competitors.

Canadian companies have registered many successes around the world, most notably in mobile personal satellite communications, remote-sensing hardware and data acquisition. They are responding to growing demand for space equipment and services centred around Earth observation facilities and telecommunications equipment. The industry has also developed an advanced capacity in robotics and space infrastructure and has been a major contributor to the International Space Station Program.

The recently launched Canadian satellite, RADARSAT, ushers in a new age in remote sensing and firmly positions Canada as a

leader in Earth observation. Unlike most remote-sensing satellites, which use optical sensors to capture sunlight reflected from the Earth, RADARSAT can collect images of the Earth day or night and through clouds using a powerful microwave Synthetic Aperture Radar system. Positioned approximately 800 km above the Earth, RADARSAT produces images of the surface that can be used in monitoring the environment and managing the Earth's natural resources.

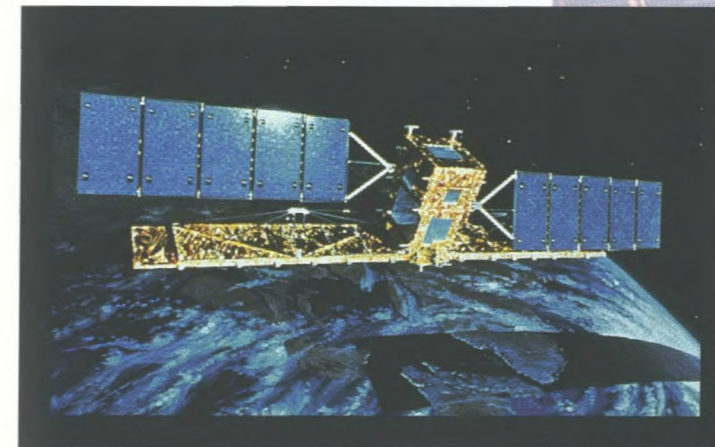


PHOTO COURTESY OF  
RADARSAT INTERNATIONAL INC.

Television viewers around the world observed the mission of the U.S. space shuttle Atlantis in the Fall of 1995. This mission used Canada's newly developed Space Vision System, which made possible the installation of a connecting bridge between the shuttle and the Russian space station MIR.

Early in 1996, the Canadian-made MSAT will be launched. It will be the world's most powerful commercial satellite for mobile and fixed applications. The MSAT Network will bring advanced mobile and stationary wireless telecommunications to almost every square kilometre of Canada, picking up where cellular networks leave off. It will cover all of Canada, the United States and Mexico, most of the Caribbean and Central America, and 400 km out to sea, helping individuals, businesses, and search-and-rescue teams, in coastal and remote areas.





Canadian financial institutions offer a variety of products and services that have made them attractive to customers and investors around the world. They not only offer lucrative investments, they also offer safe investments. As a result, Canadian financial institutions are one of Canada's leading export earners.

Banks...insurance companies...trust companies...co-operatives...stock exchanges: no country can claim safer financial institutions than those regulated by the federal and provincial governments of Canada. Canadian legislators are very attentive to the rules and regulations that govern Canada's financial sector. They are determined to maintain a system that is both stable and encourages competition.

Canadian financial institutions have built a significant presence abroad over the past several decades. Liberalization of financial regulations in North America, Europe and Asia is providing foreign clients with greater opportunities to take advantage of Canadian financial services. The Canadian system itself has opened up in recent decades, to the advantage of consumers.

**CANADIAN  
FINANCIAL  
INSTITUTIONS  
MANAGE EFFICIENT  
AUTOMATED  
SYSTEMS SPANNING  
LARGE NETWORKS  
OF BRANCHES.**

Canada's six major banks have all established foreign commercial operations, most of them in a variety of countries on several continents. Canadian life insurance companies, major investment brokers and trust companies operate virtually everywhere in the world.

These institutions have responded to the growing interest of foreign investors in Canada as a secure, low-restriction market offering attractive returns and an opportunity for risk diversification. They have also responded to the growing demand for competitive, reliable financial services in other countries.

While there are differences among the services offered by Canadian institutions, there are also some basic similarities:

- Banks focus on private and investment banking services for both Canadian and international customers. They also offer foreign exchange and treasury services, trade credit, guarantees and acceptances.
- Trust companies offer private and merchant banking, investment services and a range of advisory services both to international and Canadian clients.
- Life insurance companies sell individual policies and annuities to local customers, either directly, through brokers, or through corporate employee benefit plans.
- Brokerage houses offer Canadian securities – as well as securities from other countries – to international and Canadian customers.

Technological change is making modern financial institutions far more efficient and user-friendly than they used to be. Canadian financial institutions have developed a sophisticated capacity to manage efficient automated systems spanning large networks of branches across Canada. They possess a wealth of expertise in operating and co-ordinating branches, in the design of payments systems, and in many other areas. Some foreign financial institutions have already learned that they can speed the modernization of their systems by taking advantage of these advisory resources.

The Canadian Depository for Securities has developed an automated facility for the electronic clearing of security transactions and the custody of securities. This facility helps reduce clearing costs through its efficiency and protection against fraud and corruption.





Canadian institutions are always looking for ways to offer healthy returns on equity to international customers seeking opportunities that are diversified, potentially lucrative, and safe. In recent years they have upgraded their capacity to offer assistance with investment banking, treasury and foreign exchange operations, and various private banking services. They are also experienced in the realm of venture capital through sponsorships and investments in venture funds that finance high technology companies.

Canadian insurance companies have been successful at selling life and health insurance policies as well as pension plans and annuities to foreign companies. The Canadian advantage can be stated in one word: security. In Canada, life and health insurers must satisfy regulatory authorities that policy reserves are sufficient to meet the anticipated requirements of policyholders.

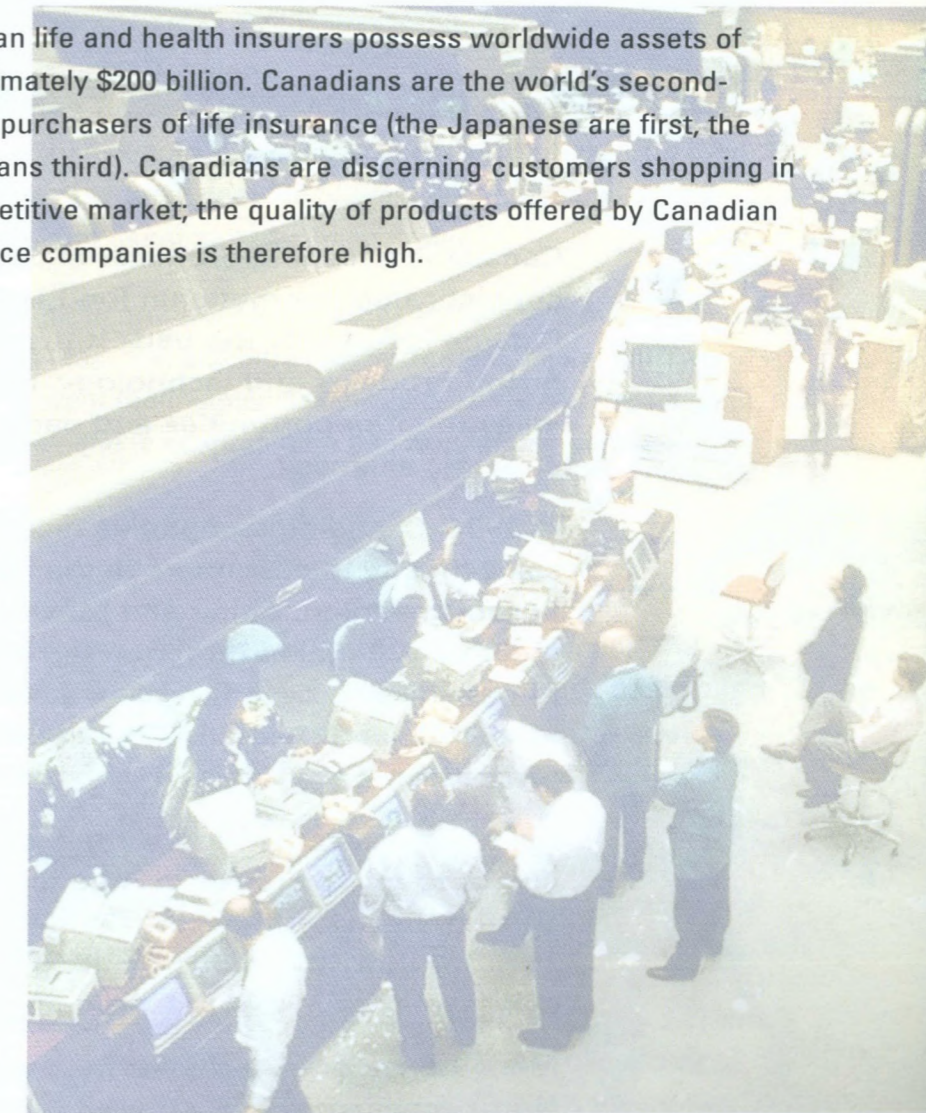
The Canadian insurance industry is competitive – there are 160 companies. Since there are no significant barriers to entry for foreign or domestic players – other than clear regulations that guarantee the safety of a client's money – the system is extremely competitive.

The system offers a variety of traditional life insurance products in health, accident and sickness, and annuities and other pension services. This Canadian system is appreciated in the United States and other foreign countries: more than 40 per cent of the industry's revenues come from abroad. More than five million non-Canadians own more than \$600 billion in life insurance policies underwritten by Canadian companies.

Although there has always been a strong regulatory framework for insurance companies in Canada, several steps were taken by the federal government in 1992 to enhance consumer protection. The Canadian industry itself provides a protection fund for policyholders with Canadian institutions. The government further enhanced the system's international reputation by bringing in a regime of Minimum Continued Capital and Surplus Requirements. This is similar to the Bank for International Settlements, which ensures that banks have adequate capital available to settle all claims in even the most difficult circumstances.

Canadian life and health insurers possess worldwide assets of approximately \$200 billion. Canadians are the world's second-largest purchasers of life insurance (the Japanese are first, the Americans third). Canadians are discerning customers shopping in a competitive market; the quality of products offered by Canadian insurance companies is therefore high.

**THE CANADIAN  
ADVANTAGE CAN  
BE STATED IN  
ONE WORD:  
SECURITY.**





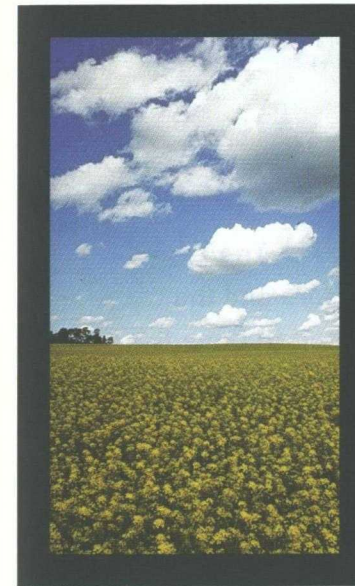
— Canada is a leading producer and exporter in the increasingly sophisticated international food and beverage marketplace.

— Canada is not only the perfect place to shop for competitively priced products and technology, but it also presents enticing investment opportunities and partners willing to form strategic alliances.

— In 1994, Canadian companies recorded \$15 billion in agri-food sales mostly to customers in the United States, Japan, the European Union, China and Mexico. The industry expects to meet its \$20-billion target by the end of the decade. The secret to Canada's success has been a combination of high quality foodstuffs and dramatically increased efficiency in processing them.

Canadian-based agri-food companies have gained preferential access to the entire North American market of 370 million consumers under the North American Free Trade Agreement. To serve this rich and demanding market, Canadian businesses offer first-rate, innovative products at competitive prices.

Many Canadian companies have recognized that success in North America can be duplicated in markets around the world, where the demand for value-added foods and beverages is booming, especially in emerging economies. Here are some sectors in which Canadian agri-food interests are internationally competitive:



## CEREAL GRAINS

Canada's international reputation for high quality wheat is undisputed. Canadian grains and oilseeds and their products are known for their consistency and superior quality. In 1994, foreign customers bought close to 36 million tonnes of grain, oilseeds and related products worth nearly \$7.8 billion.

Many nutritionally and functionally superior grain varieties will emerge from ongoing work by a Canadian research network. This network, operating within a long Canadian tradition of developing new grain technologies, has committed itself to widening Canadian processors' current competitive advantages in quality and cost. It has developed cereal grains that possess superior protein composition and processing characteristics. New food ingredients and functional foods are being derived from both traditional and genetically modified grains.

Canadian grain processing industries include wheat, corn and oat milling; malting; and biscuit, breakfast cereal, pasta, gluten and starch. Current technology maximizes quality and production in these areas and is adaptable for use around the world.

## SEAFOOD

New processing technologies and product innovations are transforming Canada's seafood processing industry. Canada is a world leader in processing what was once regarded as lower-value seafood, such as geoduck, horse clams, rockfish and several Pacific groundfish species. It also leads in the processing of by-products for new food ingredients and industrial products such as chitin, chitosan and bi-polymer chemicals used in industries ranging from pharmaceuticals to water treatment.

Intelligent management decisions, advanced technology and innovative marketing have responded to, and mitigated the effects of, the decline of some groundfish stocks in Canada. The industry has combined new overseas product sources and a greater emphasis on aquaculture to strengthen its position in the marketplace. Often, alliances forged with foreign firms have created new sources of supply and new potential for demand.





**VEGETABLE OILS**

Canada is internationally known for the development of canola, a superior oilseed, as well as many products derived from canola. Canola oil has become a popular vegetable oil worldwide, both for direct consumption and for use as an ingredient in many processed food products. Research and development under way in Canada will lead to new edible oils with superior nutritional properties, as well as a new array of non-edible vegetable oil products for industrial use.

**MEAT AND ANIMAL GENETICS**

Canada is a high-quality supplier of meats to world markets. The experience of Canadian livestock producers and meat processors and the application of state-of-the-art technology have contributed to Canada's reputation for excellence. Canada continues to develop new processing technologies in areas that include finished product handling, preservation and packaging. Canadian firms export both technology and consumer products, often to non-traditional markets.

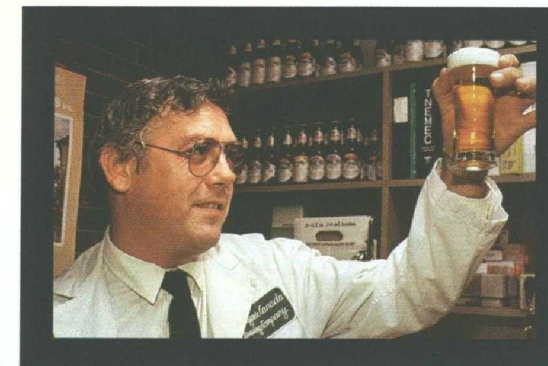
With 16 per cent of the world market, Canada is the world's second-largest pork exporter (\$621 million in 1994). The strength of these sales is based on Canadian pork producer's efficient production methods, access to economical feed, modern technology, strict inspection standards and superior breeding stock. Canada's cattle-breeding genetic exports are rising; semen exports were over \$30 million in 1994, and embryo exports are approaching \$5 million.

Canada's meat processors specialize in products made from red meats, including beef, veal, pork and lamb. Meat processing companies make a wide variety of meat products ranging from fresh or frozen meat to processed, smoked, canned and cooked meats, as well as sausage and deli meats.

**PROCESSED FOODS AND BEVERAGES**

The Canadian processed food and beverage industry has grown significantly during the first half of the 1990s. The value of annual exports increased by \$2 billion between 1990 and 1994.

Meat and poultry products top the list of shipments by Canadian processors, followed by dairy and cereal products, including flour, baked goods, breakfast cereals, feeds and pasta. Other important exports include wines and spirits, fruits and vegetables, seafood products, soft drinks, confectioneries, vegetable oils and snack foods.



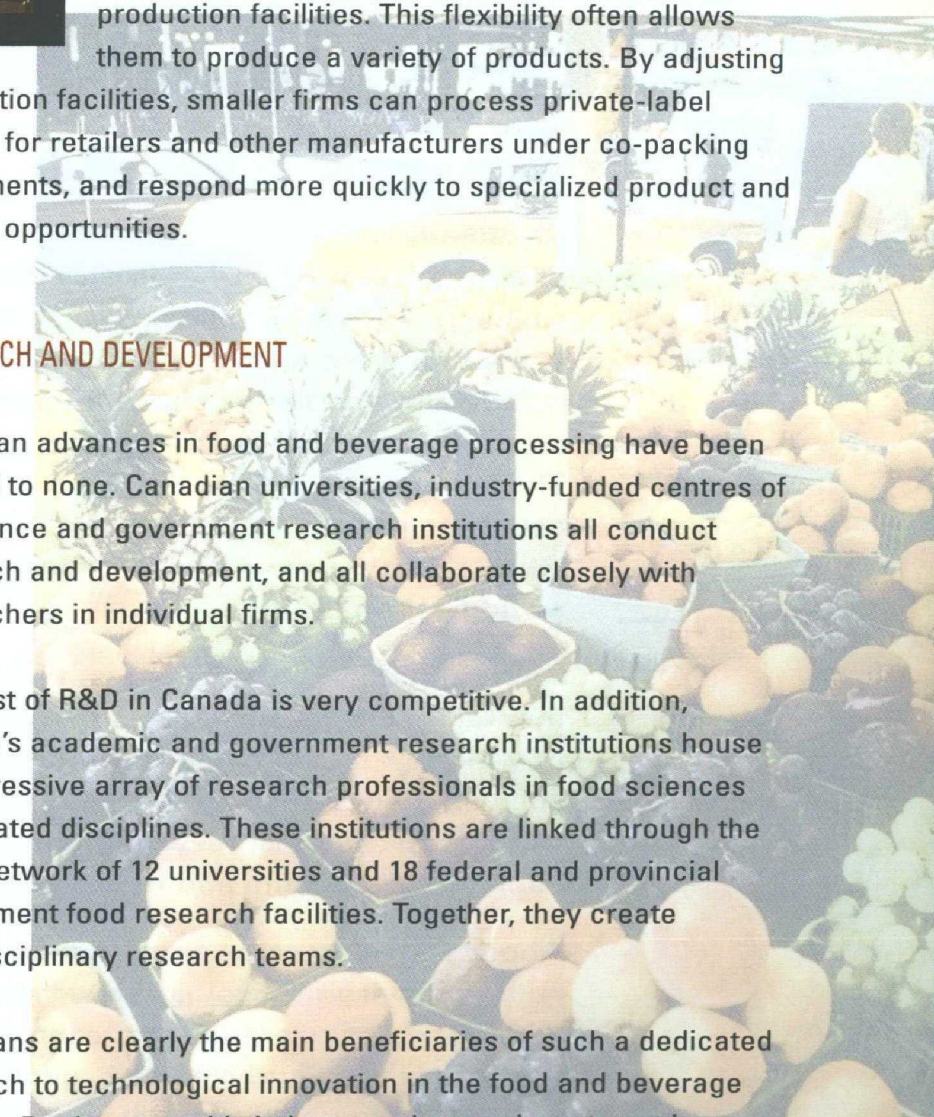
Canadian companies make good partners. While Canada's larger processors ship a variety of foods, many smaller firms have become competitive by using flexible processing equipment and adaptable production facilities. This flexibility often allows them to produce a variety of products. By adjusting production facilities, smaller firms can process private-label brands for retailers and other manufacturers under co-packing agreements, and respond more quickly to specialized product and market opportunities.

**RESEARCH AND DEVELOPMENT**

Canadian advances in food and beverage processing have been second to none. Canadian universities, industry-funded centres of excellence and government research institutions all conduct research and development, and all collaborate closely with researchers in individual firms.

The cost of R&D in Canada is very competitive. In addition, Canada's academic and government research institutions house an impressive array of research professionals in food sciences and related disciplines. These institutions are linked through the Food Network of 12 universities and 18 federal and provincial government food research facilities. Together, they create multidisciplinary research teams.

Canadians are clearly the main beneficiaries of such a dedicated approach to technological innovation in the food and beverage industry. But because this industry welcomes investment in Canada and partnerships abroad, entrepreneurs and consumers in other countries are also taking advantage of Canadian advances in this field.





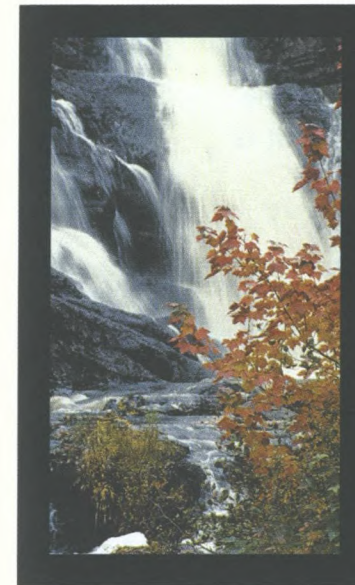
— Canadians have a strong attachment to the land. They wish to preserve the quality of their air and water, protect nature and conserve wildlife. Public opinion polls in Canada consistently show that the environment is a high priority for Canadians. Nearly all Canadians believe that governments and corporations should show greater concern for the world's ecology. These concerns in Canada – and similar concerns in other countries – have helped foster a Canadian environmental industry with a reputation for innovative approaches to ecological problems.

— Approximately 4,500 Canadian firms are active in the environmental industry. These firms earned about \$11 billion in 1994 of which \$6 billion came from the sale of manufactured goods such as membranes for water treatment, heat exchangers, ventilation systems, recycling equipment, alternative fuel vehicle components and hydro turbines.

About \$5 billion came from the sale of services such as consulting, environmental and energy engineering, as well as a wide range of scientific and technical services. These included spill prevention and clean-up, geomatics, remote sensing, waste management, laboratory testing and general research.

Most countries recognize that economic growth and environmental protection go hand in hand. While many countries are quickly developing their own capabilities, they also need efficient and workable innovations in services and equipment.

Clients and joint venture partners around the world are looking to Canadian companies to provide the needed expertise for a wide range of environmental undertakings whether they involve soil, water or air. More than 800 of Canada's environmental companies are exporters and Canada is a world leader in environmental services, biotechnology, remediation, monitoring and instrumentation.



## WASTEWATER MANAGEMENT

Canadian industrial wastewater management firms, associated research and development centres, and universities have developed expertise and technical solutions for complex wastewater treatment requirements.

Some processes and applications in which Canadian firms specialize include:

PROCESS	APPLICATIONS
<b>Anaerobic technology</b>	Energy recovery that offers a significant cost savings
<b>Sequencing batch reactor technology</b>	Effluent treatment that produces a highly sanitized result and offers significant cost savings
<b>Biological nutrient removal</b>	Phosphorus removal to less than 0.3 mg/L and nitrogen removal to 1 mg/L at temperatures of less than 10°C





<b>Reciprocating ion exchange</b>	Metal ion recovery for recycling with payback periods as short as one year
<b>Membrane systems</b>	Separation and recovery of valuable feed stock to save on treatment costs
<b>Automated polymer dosing</b>	Sludge dewatering that offers up to a 40-per-cent polymer savings
<b>Ultraviolet oxidation</b>	Destruction of complex synthetic organic compounds for re-treatment and/or post-treatment of industrial effluent and remediation of contaminated aquifers
<b>Ultraviolet disinfection</b>	Cost-effective and environmentally friendly control of bacteria in effluent and industrial process waters
<b>Wet air oxidation</b>	Compact technology for breakdown of complex organic compounds
<b>Oil from sludge (OFS)</b>	Residuals management with useful by-product recovery
<b>Wastewater treatment plant modelling</b>	Realistic, dynamic modelling for process design and operation control of wastewater treatment plants

**AIR QUALITY MANAGEMENT**

The majority of air quality management equipment manufactured by Canadian companies can be grouped into filters, extractors, specialized scrubber components and some precipitators. Canadian companies have expertise in managing sulphuric emissions and the effects of acid rain, as well as in advanced industrial filtering systems.

Canadian air quality management firms have developed innovative, cost-effective solutions in emerging sectors, including:

- CONTINUOUS EMISSIONS MONITORING WITH PROCESS CONTROLS,
- BIOFILTRATION,
- BIOMEDICAL WASTE INCINERATION,
- HOT-GAS CLEANING USING ADVANCED PARTICLE FILTERS.

**CANADA IS A  
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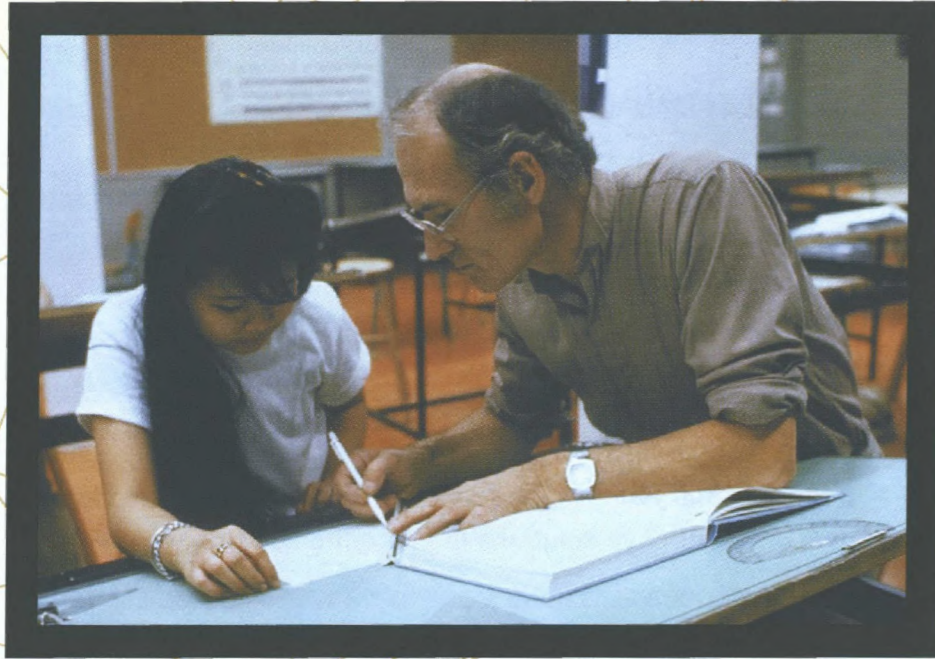
**SOLID WASTE MANAGEMENT**

Currently 80 per cent of municipal and industrial solid waste in Canada is disposed of by landfilling. The remainder is disposed of through recycling, resource recovery and incineration. More stringent regulations in many countries have made solid waste management one of the fastest-growing sectors of Canada's environmental industry. While Canadian companies' emphasis to date has been on the North American marketplace, Canadian solid waste equipment and services are shipped worldwide.

Canadian expertise in solid waste management includes:

- COMPOSTING AND RECYCLING TECHNOLOGIES,
- MATERIAL RECOVERY FACILITIES,
- INCINERATION,
- WASTE-MANAGEMENT PLANNING,
- SLUDGE MANAGEMENT.





— In the new knowledge-based economy, a highly educated and trained workforce is one of the most important resources in making a country competitive. Canada has gained international respect and admiration for the excellence of its educational system. Successful graduates from Canadian universities and colleges are now providing leadership in many governments and businesses around the world.

— Canadians have always placed a premium on education and demand first-rate schools. They spend more per capita on their education system than any other country in the Organization for Economic Cooperation and Development (OECD): 7.1 per cent of gross domestic product compared to an average of 6.1 per cent in other OECD countries.

Many Canadian universities – such as British Columbia, Alberta, Queen’s, Toronto, McGill, Laval, Montreal and Dalhousie – are widely known and respected around the world. While perhaps not as well known, comparable programs are offered at dozens of other Canadian universities such as Simon Fraser, Lethbridge, Calgary, Western Ontario, Concordia and St. Mary’s. Two great strengths of the Canadian university system are the consistent level of quality at all schools and instruction in both the English and French languages.

Canada’s community colleges, which offer training toward specific careers, complement the country’s university system. Often their training is technical and provides hands-on experience. Many Canadian students are now combining university degrees with college degrees to ensure that they obtain the highest level of academic qualifications and specific training in a targeted job sector.

Learning is a lifetime occupation in Canada. Many Canadians pursue continuing education courses to upgrade their qualifications, acquire new professional skills and keep pace with changes in technology and with new theories and practices in the work place. Canadian educational institutions and corporations have designed courses specifically to meet the needs of a rapidly changing workforce.

Canadian educational institutions attract many foreign students. In 1994-95, there were 59,200 international students at the post-secondary level in Canada: 22,500 at the college and trade school level and 36,700 at the university level. These students have discovered that one advantage of studying in Canada is the superb quality of second-language and foreign-language training available across the country.

International students who have studied in Canada speak glowingly of the country’s safe and clean surroundings, its high quality of education, and the friendly welcome they receive from Canadians. Most overseas students who come to Canada are also happy that the weather is not as severe as they anticipated. Even in winter, Canada is no colder than the northern United States.

Canada also offers low fees for international students. A 1995 study conducted by IDF Education Australia Ltd. showed that Canadian universities offer lower tuition rates for international students than do universities in the United States, the United Kingdom, Australia and New Zealand, while maintaining an excellent quality of education. The median fee for a Master of Arts, for instance, was listed as US\$5,546 for Canada, compared to US\$7,844 for Australia, US\$7,852 for New Zealand, US\$8,082 for the American public system, and US\$15,534 for American private universities.

**CANADA SPENDS  
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PHOTO COURTESY OF THE  
UNIVERSITY OF ALBERTA

A study by Canada's Department of Foreign Affairs and International Trade shows that students from Hong Kong and Singapore are taking particular advantage of Canadian educational facilities. In 1993, Canada attracted about 25 per cent of Hong Kong students studying overseas. For Singapore, the figure was 14 per cent. More than 3,000 American students studied at Canadian universities in 1994-95.

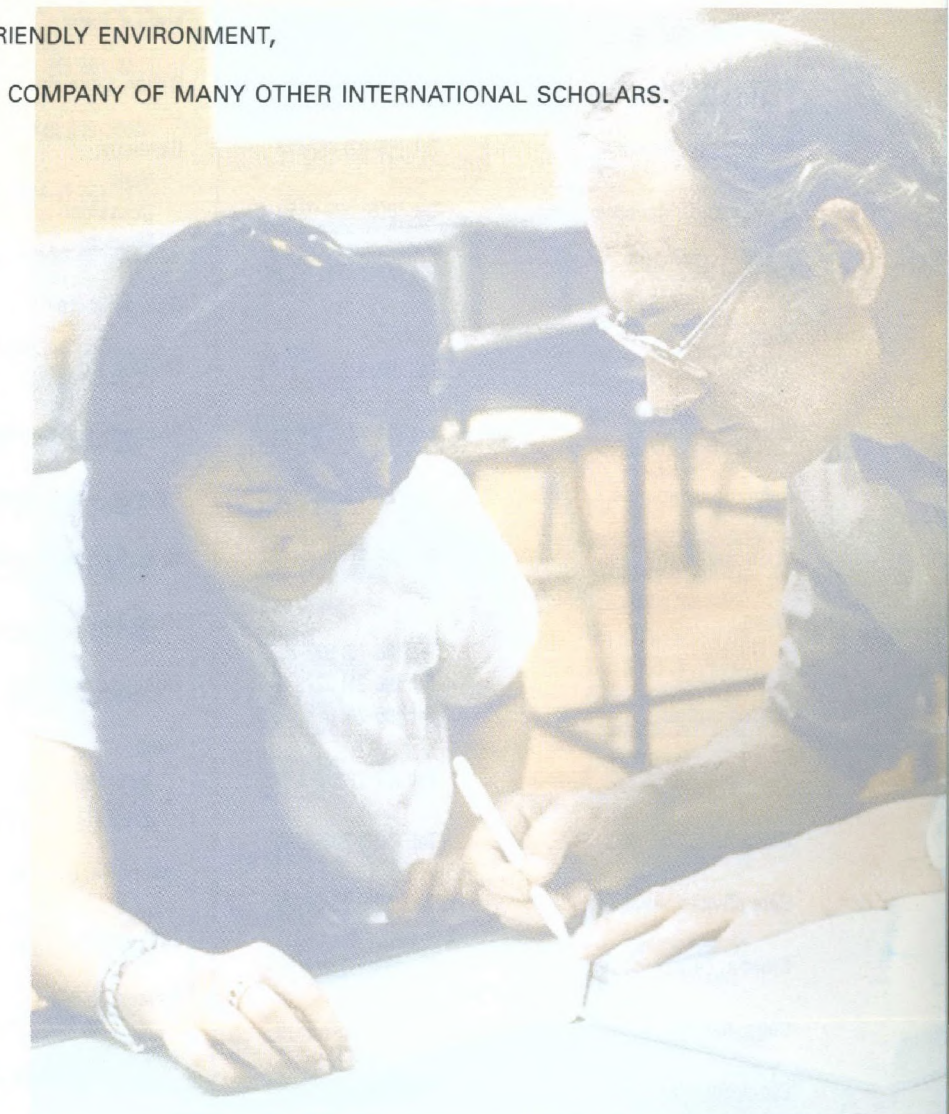
Canada is expanding its network of Canadian Education Centres in the Asia-Pacific region. These centres are designed to help match the interests and needs of international students with the resources available at Canadian schools. They are operated by the Government of Canada in co-operation with the Asia Pacific Foundation of Canada.

Canadian educational institutions are also actively involved in the emerging field of distance education. Canada is a huge country and distance education helps people in remote areas pursue their studies. Several schools are examining the possibility of offering such studies overseas. In some cases, Canadian telecommunications suppliers and educational institutions are working with foreign ministries of education to make distance learning possible.

Canadian educational institutions offer an unbeatable combination, including:

- EDUCATION THAT MEETS THE HIGHEST INTERNATIONAL STANDARDS,
- PRESTIGIOUS, INTERNATIONALLY RECOGNIZED DEGREES,
- LOW FEES FOR FOREIGN STUDENTS,
- A SAFE ENVIRONMENT,
- A CLEAN ENVIRONMENT,
- A FRIENDLY ENVIRONMENT,
- THE COMPANY OF MANY OTHER INTERNATIONAL SCHOLARS.

**CANADIAN  
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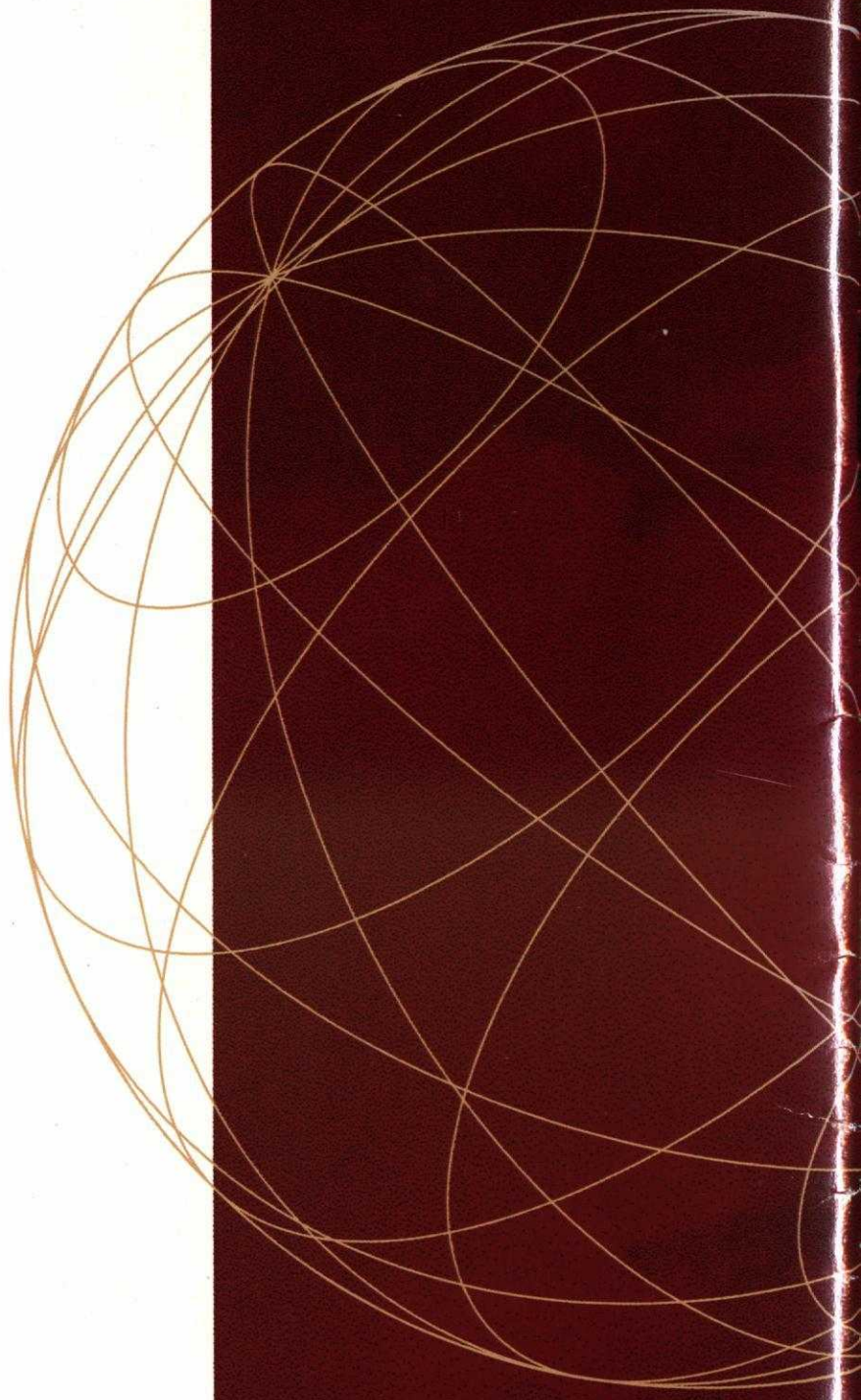


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