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CANADA

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CANADA'S ECONOMY IN 1964 AND THE OUTLOOK FOR 1965

The following is the text of the year-end review of the Canadian economy issued by the Minister of Trade and Commerce, Mr. Mitchell Sharp:

Following several years of uninterrupted advance, the Canadian economy has moved forward with new vigour in 1964. More adequate utilization of the productive resources of the economy has been achieved. Many industries are operating at, or near, full capacity. Canada's gross national product has risen by 8 per cent from 1963 to 1964; in real terms, by 6 per cent. This year's grain crop, though below the all-time record of 1963, was well above average. All major industrial groups have contributed to the growth in national output. Service industries and construction trades have been unusually active. Secondary manufacturing has remained in the forefront of the general advance. Each of the principal regions of Canada has participated, in a major way, in this continuing growth.

In response to rising domestic sales and higher exports achieved under the incentive programme, there has been another notable expansion in the automotive industry. Although hampered by plant shutdowns towards the end of the year, motor-vehicle production for the year as a whole has exceeded the previous record of 630,000 in 1963. Steel production approximated 9 million tons, 11 percent higher than in 1963 and 40 percent above the level of three years ago. Other secondary industries achieving notable gains in 1964 include most machinery-producing groups and manufacturers of heavy transportation equipment, construction materials, chemicals, textiles, rubber products and flour.

Canada's resource-based materials again recorded substantial increases in production, the greatest

gains occurring in zinc, iron ore, potash, aluminum and plywood. The large addition to newsprint output reflected, in part, fewer and shorter U.S. newspaper shutdowns than in 1963 and some earlier years. Notably larger volumes of petroleum, natural gas, asbestos, copper and woodpulp were marketed. Moderate increases were reported for nickel, lumber and coal. Electric-power generation achieved its strongest increase in recent years.

INDUSTRIAL PRODUCTION

Total industrial production appears to have risen by nearly 9 per cent from 1963 to 1964 compared with increases of 8 per cent and 5 per cent in 1962 and 1963 respectively. The rise in industrial production since the beginning of the current expansion in 1961 now surpasses that realized in the resource boom of the mid-1950's. Moreover, this present phase of industrial growth is more broadly diffused, secondary manufacturing contributing significantly to the overall advance.

Despite more rapid growth in the labour force, new jobs have more than kept pace with new entrants to the labour market. As a result, unemployment has declined. Total employment was on average 3.6 percent higher in 1964 than in 1963 and unemployment was 12 percent lower. On a seasonally-adjusted basis, jobless persons have fallen to less than 5 per cent of the labour force.

A key feature of Canada's recent development has been the strong rate of improvement in productivity, especially in goods-producing industries. Technological advance and other forces contributing to the more effective use of productive resources result in higher real incomes and lower costs.

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These, in turn strengthen the position of Canadian products in both domestic and foreign markets and thereby contribute to expanded sales and more employment. Thus the steady improvement in productivity in recent years has contributed importantly to Canada's sustained expansion.

CAPITAL EXPANSION

A new wave of capital expansion occurred during 1964. Following the resource boom of the mid-fifties, business-capital outlays declined sharply. While there was considerable modernization of, and addition to, capital facilities in subsequent years, the trend of capital expenditure was only moderately upward in the period 1958 to 1963. By early 1964, the overhang of idle capacity, which for some years had exerted a dampening influence on capital spending, had been substantially reduced and operating rates in most industries had moved much closer to capacity levels. These altered circumstances brought new interest and urgency in getting ahead with capital-expansion programmes. By mid-year, business investment plans for 1964 involved outlays 18 percent above actual expenditures in 1963 and the latest indications are that these programmes, for the most part, have been realized.

House-building activity also has been sharply higher in 1964. It is estimated that no fewer than 165,000 housing units were started during the year and 150,000 units were completed, the total value of work put in place rising by about one-fifth from 1963 to 1964. Extension of the winter-housing bonus for a second season and a larger carryover of unfinished houses at year-end is giving a strong start to residential building in the coming year.

INTERNATIONAL MARKETS

Perhaps the most notable feature of Canada's economic development in 1964 has been the remarkable performance in international markets. In the first ten months of the year, the value of merchandise exports rose 21 per cent from the same period in 1963, and for the full year is likely to equal, or even exceed, \$8.2 billion, compared with \$7 billion in 1963. Huge new contracts for Canada's traditionally most prominent export, wheat, together with an ample supply boosted shipments far beyond any previous movement. Even excluding wheat, the near \$1-billion increase in the value of all other exports is the largest advance ever achieved in one year. Items showing substantial gains in 1964, in addition to wheat, include pulp and paper, iron ore, base metals, aircraft and automotive products. Canada's trade performance in 1964 was also notable for the further broadening in the range of products penetrating foreign markets, particularly in the field of manufactured goods. For example, exports of end products, consisting primarily of a great variety of machinery and equipment and finished consumer goods, rose by more than one-third in the past year and have about doubled in the past three years. The rise in sales of equipment and related products has been greatly facilitated by the availability of long-term credit for capital-goods exports, by defence-production sharing arrangements and by larger foreign-aid programmes.

Exports to each of Canada's principal foreign market areas have increased in 1964. Sales to the United States have risen less than total exports but are nevertheless up by a healthy 12 per cent on the basis of a ten-month comparison. Exports to the United Kingdom are up by 18 per cent, to the European Economic Community by nearly one-quarter and to Japan by 14 per cent. Special wheat sales to the U.S.S.R. in the 1963-64 crop year raised this country to the rank of a major overseas customer.

Merchandise imports into Canada also have risen sharply (16 per cent on the basis of a nine-month comparison), mainly in response to increased demands for machinery and equipment and consumer goods. Nevertheless, the growth in imports has not fully kept pace with exports and the merchandise trade surplus has shown a further significant expansion.

On the other hand, in the area of non-merchandise current transactions, expenditures have risen more than receipts, reflecting mainly the further increase in interest and dividend payments and the reversal in the tourist position. A new upsurge in spending by Canadians abroad somewhat exceeded the continuing growth in tourist receipts.

Canada's balance on all current transactions showed a deficit of \$280 million in the first nine months of 1964 compared with a deficit of \$436 million in the same period over a year ago.

EXTERNAL ECONOMIC ENVIRONMENT

As Canada enters 1965, the external economic environment is generally favourable, though disturbing elements are also present. World production and trade continue to move ahead. In the United States, there is widespread expectation of sustained expansion in 1965, though possibly at a lower rate of advance. In Britain, the emergence of severe strain in the balance of payments has been accompanied by a slowing of economic expansion and has necessitated the implementation of special corrective measures, including a surcharge of 15 per cent on all imports other than food and basic materials. Also, in some other industrial countries, the upward trend of economic activity has moderated. Nevertheless, the consensus is that economic activity in the free world at large will continue to expand in 1965 but somewhat less rapidly than in the past year.

Sustained expansion in the trading world should provide the basis for further gains in Canada's export sales in most product categories and market areas. The trend of total exports, however, will be subject to restraining influences. In the case of wheat, for example, sales are likely to be well below the extraordinary level of 1964. However, existing contractual arrangements with state-trading countries and the prospect of sustained shipments to regular commercial markets should mean an above-average export year. The British import surcharge constitutes another dampening influence. This surcharge covers items amounting, in value terms, to about \$280 million in 1964, i.e., a little less than one-quarter of Canada's exports to Britain. Sizeable losses in business will undoubtedly be encountered in some product lines, although these losses may be offset in part by gains in those categories free of the surcharge.

(Continued on P. 6)

CANADA'S HEALTH AND WELFARE IN 1964

The following passages are from a review of the activities of the Department of National Health and Welfare issued at the end of December 1964:

The year 1964 saw increased activity in several important areas of responsibility of the Department of National Health and Welfare. Among these were the Canada Pension Plan, programmes involving smoking and health, fitness, and mental retardation. Of special importance was legislation concerning Youth Allowances, which provides \$10.00 a month for 16 and 17 year old children who remain in school.

PENSION PLAN

One of the most important pieces of welfare legislation ever proposed in Canada was placed before Parliament last November by the Honourable Judy LaMarsh, Minister of National Health and Welfare, when she introduced a bill to establish the Canada Pension Plan. The bill provides for a universal, contributory pension plan for employees and self-employed persons in Canada.

Among the major features of the Plan are provisions for the survivors of contributors and for disabled persons. The Plan will provide pensions for widows and dependent children of contributors who die. Apart from workmen's compensation and veterans' pensions, only public-assistance measures have been available to aid such survivors. Similarly, disabled persons formerly depended on assistance programmes, such as blind persons' allowances and allowances for the totally and permanently disabled. Under the Canada Pension Plan, there will be, for the first time, social-insurance protection against disability.

The Research and Statistics Division was involved in the preparation of the Canada Pension Plan through an interdepartmental committee which met with representatives of the provinces to discuss a wide range of subjects in relation to the Plan. This division also collaborated closely with the Department of Justice in putting the Pension Plan bill into final form for submission to the House....

SMOKING AND HEALTH

The educational activities of the smoking and health programme were substantially increased over the year. Recognition of the need to inform the public about the relation of cigarette smoking to certain diseases had been given by the Minister in 1963, and a Canadian Conference on Smoking and Health had

HUGE DEMAND FOR COIN SETS

Mr. Walter L. Gordon, the Minister of Finance, has announced that the Royal Canadian Mint had received, by the first business day of the new year, so many orders for 1965 sets of "uncirculated coin" that it would require the present production facilities of the Mint for this type of coin all year to meet the orders now at hand. The orders are being accepted in accordance with the announcement made on September 29 last that they would be filled on a "first-come-first-served" basis.

confirmed the desirability of immediate action. In January 1964, two technical advisory committees — one on health education and the other on research — assisted the Department in initiating a programme....

FITNESS PROMOTION

The vital matter of physical fitness among Canadians is the prime concern of the Fitness and Amateur Sport Directorate of the Department. The federal programme is divided into three main parts: direct grants to national organizations or to individuals for advanced training and research; services provided by the Department, largely in the form of technical advice and training aids; grants-in-aid to the provinces for the support and development of services at the provincial and community levels. In the fiscal year beginning April 1, 1964, a total of \$3 million was allotted for use in these areas.

Two important steps were taken in 1964 in the field of fitness research. Units for advanced study were established at the Universities of Alberta, Montreal and Toronto, with a sum of \$750,000 provided from the federal programme's funds for their use over the next five years. In addition, a national documentation centre on fitness and amateur sport went into operation at the University of Ottawa, with Departmental assistance. The centre acts as a clearing-house for technical material on fitness in Canada and abroad....

DISASTER PLANNING

During 1964, the Emergency Health Services Division gave added emphasis to planning for natural disaster. An increasing number of hospital disaster institutes were conducted and, as a result, a large number of hospitals throughout Canada now have a plan for an emergency and have actually tested their plan in a simulated natural disaster, such as a major railway accident.

Official approval of an additional \$3.5 million was given to provide a medical stockpile of some \$21.5 million. This national-emergency medical stockpile was the source of the supplies sent by the Canadian Red Cross to Cyprus in August of 1964. Although the primary purpose of the stockpile is to provide medical aid in the event of a national emergency in Canada, the Cyprus disaster underlines the usefulness for such a standby reserve in time of peace....

This unprecedented demand for numismatic sets of coin, coming on top of much higher levels of requirement for coin in circulation, greatly exceeds the capacity of the Mint even operating, as it has been, on three shifts a day. The management and staff have achieved in the past year a remarkable record of coin production, totalling 665 million pieces, compared to approximately 400 million pieces in the preceding year, which itself had been a record.

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New high-speed presses are on order, delivery of which will begin in about six months. It is planned to expand the production facilities of the Mint in temporary quarters as quickly as the necessary equipment can be obtained and arrangements made for relocation. Additional production facilities on a permanent basis are under active consideration. These will include the construction of a modern building with up-to-date equipment.

ELECTRIC POWER IN 1964

The year 1964 promises to be a big year in electric power construction in Canada, according to National Resources Minister Arthur Laing. An estimated 2.1 million kilowatts of new generating capacity will go into operation before the end of the twelve-months, the minister forecast. This includes 1.2 million kilowatts of hydro (water-power) capacity and 0.9 million kilowatts of thermal (heat-producing) capacity.

In 1964, Canada's constantly growing requirements for electric power for industrial, agricultural and domestic use led to the installation of 818,000 kilowatts of new generating capacity. This included 436,000 kilowatts thermal and 382,000 kilowatts hydro.

Re-scheduling of several large units accounts for most of the difference between the total of 1,349,000 kilowatts forecast for 1964 and the total of 818,000 kilowatts actually installed.

The new capacity put into service in 1964 boosted the nation's total installed hydro-generating capacity to 20.3 million kilowatts and total installed thermal capacity to 6.7 million kilowatts.

Mr. Laing said the rate at which electric power demands were growing allowed for no slackening in the pace of development of new generating facilities. To meet anticipated demands, Canada's power producers, he added, had under construction or had scheduled over 17 million kilowatts of new capacity to come into service within the next few years.

This estimate does not include any of the vast potential that will eventually be developed on the Hamilton, Columbia and Nelson Rivers and on other major river systems in Canada. The scheduled figure of 17 million kilowatts consists of over 10.5 million kilowatts hydro and 6.5 million kilowatts thermal.

FORT GARRY EXPANSION

The National Parks Branch of the Department of Northern Affairs and National Resources plans to spend about \$750,000 on the expansion of Lower Fort Garry National Historic Park near Winnipeg, Manitoba.

In December, Manitoba agreed to transfer some 14 acres of land adjoining the present eight-acre park to the Federal Government. The main lines of this agreement were settled by National Resources

Minister Arthur Laing and Manitoba Resources Minister Sterling Lyon.

TRANSFERRED AREA

The land to be transferred was the site of a small village and several farm buildings connected with the fort. The village included a store, sawmill, grist mill, blacksmith shop, distillery, beer cellar and lime-kilns, as well as several residences. Under the agreement, some of these structures will be restored by the Historic Sites Division of the National Parks Branch by 1980. However, details of this programme are yet to be worked out.

The proposed expansion will also include the provision of parking space and the construction of a visitors' centre, service building and custodians' residence.

ARMY SKIERS COMPETE

Members of the Alpine and Nordic teams which will represent Canada in the 1965 British Army Ski Association championships at St. Moritz, Switzerland, and Southofen, Germany, were announced recently by Canadian Forces Headquarters. All but one are from the 1st and 2nd Battalions, Queen's Own Rifles of Canada, stationed at Victoria, British Columbia, and Edmonton, Alberta.

The Alpine team, competing at St. Moritz, from January 9 to 23, will be defending the Royal Artillery Cup, won last year in the giant slalom unit team event by a squad from the Royal 22nd Regiment. They will also be competing in the downhill and slalom events of the competition.

BIATHALON EVENT

In Nordic team competition at Southofen from January 23 to February 5, the Canadian skiers will be up against the cream of British skiers, including the British Olympic team in the biathlon event, open to all British subjects. The four other events in which they will compete are the 4 x 10 kilometer relay, the 15-kilometer cross-country event, and the military patrol race.

The biathlon competition is conducted over a 20-kilometer course. Each contestant carries a rifle and 20 rounds of ammunition, which he fires at four different stages of the course at 10-inch targets, at ranges measuring from 100 to 200 meters.

CANADIAN-ROUMANIAN RELATIONS

The Secretary of State for External Affairs recently announced that the Canadian Government, pursuing its policy of furthering its relations with the countries of Eastern Europe, would invite a Roumanian delegation to come to Ottawa at the end of January for discussion on trade, claims, consular matters and diplomatic relations. Canadian officials from various departments will take part in these discussions.

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CANADA AND THE ICY

The following statement was issued on January 1 by the Secretary of State for External Affairs, Mr. Paul Martin, to mark the beginning of International Co-operation Year:

Today, January 1, 1965, is the beginning of the United Nations International Co-operation Year, a year which also marks the twentieth anniversary of the world organization.

The aim of International Co-operation Year is to focus world attention on those areas of international activity where co-operation exists, rather than on those areas of dispute which at present divide the peoples of the world. I hope that the events planned for this year will bring home to all Canadians the essential interdependence of all countries, and the necessity to build on and increase our involvement in the world. Just as Canada has given a lead in developing plans for the International Co-operation Year, so Canadians can give a lead to the world in carrying out these programmes, and in developing a sense of kinship with other peoples and nations.

PARTICIPATION AT ALL LEVELS
The Committee for International Co-operation Year in Canada, a non-governmental organization instituted for co-ordination of Canadian projects for ICY, has

ECONOMICS OF SPORT FISHING

The economic aspects of the increasing popularity of sport fishing during the past few years were studied in Ottawa recently at a symposium sponsored by the Department of Fisheries of Canada. Taking part were biologists, administrators and economists whose main interest was in wildlife and recreation.

The need for such a symposium had been recognized at the January 1964 Federal-Provincial Conference on Fisheries Development, where it had been pointed out that, in bringing about greater productivity and efficiency in the fishing industry, account should be taken of the growing importance of the sport fishery. The promotion of sport fishing is in general a provincial matter, though the Federal Government is responsible for the management of anadromous species and, in some provinces, other species as well.

The main speaker at the opening session was Dr. M. Clawson, Director of Land Use and Resources Management Studies, Resources for the Future Inc., Washington, D.C., an outstanding authority on the allocation of natural resources for recreational use.

Individuals and agencies, working independently, had done limited work on the effect of sport fishing on the economy, but this work had never been co-ordinated. The recent symposium provided for an exchange of ideas and served as a starting-point for future investigations and discussions on the evaluation and other economic aspects of sport fisheries.

Taking part in the discussions were representatives of interested agencies of the federal and provincial governments, universities and other agencies that had undertaken work in this field.

asked all levels of government, interested organizations, and individuals to participate in the International Co-operation Year. This Committee, under the capable leadership of Dr. J. Roby Kidd, has set up headquarters in Ottawa and all individuals with suggestions, or who wish to assist in any way, are urged to contact them. A host of projects in the scientific, cultural, and social fields have been suggested by Canadians in all parts of our nation, and many of these activities, including book donations by Canadian schools to their counterparts in less-developed countries, town-twinning projects, food shipments, adoption of a universal ICY postage stamp, and educational seminars, are being implemented. I hope the primary impetus in International Co-operation Year will come from non-governmental organizations and individual Canadians, whose increased awareness of world affairs must be the basis for international co-operation and the quest for peace.

I therefore ask all Canadians to join in making the International Co-operation Year a success, and to bend their efforts to develop a keener sense of international responsibility and personal involvement in the affairs of the world.

NATIONAL COUNCIL OF WELFARE

The establishment of the National Council of Welfare was announced recently by Miss Judy LaMarsh, the Minister of National Health and Welfare. In making the announcement, the Minister explained that the Council would be her principal adviser on her responsibilities under the Department of National Health and Welfare Act relating to the promotion and preservation of the social welfare of Canadians.

The advice of the Council will be sought on those programmes through which financial assistance is paid to the aged, the blind and disabled, and the unemployed. It will also advise on such matters as welfare services, the training of welfare personnel, and welfare research.

The Council consists of the federal Deputy Minister of Welfare, who will act as chairman, the provincial deputy ministers, and ten other persons who have demonstrated a capacity, through experience in the welfare field, to make a significant contribution to the deliberations of the Council.

DISASTER AID TO INDIA, CEYLON

The Secretary of State for External Affairs recently announced that the Canadian Government would make available to India and Ceylon, through the Canadian Red Cross Society, \$40,000 in relief assistance to help these countries repair the damage done by the recent cyclone and tidal-wave disaster.

In addition to this assistance, the Canadian Government is investigating the possibility of providing further help to Ceylon and India, possibly in the form of building materials for reconstruction and rehabilitation.

CANADA'S ECONOMY IN 1964 AND THE
OUTLOOK FOR 1965

(Continued from P. 2)

A NEW CONFIDENCE

The continuing forward surge of the Canadian economy, backed up by improved performance in world markets and the promise of further gains, has given rise to a new-found confidence within the Canadian business community. In this environment, the dominant feature of the domestic market outlook for 1965 is the expectation of a further substantial rise in capital spending. Information at present available on business investment plans for 1965 indicates a level of outlays from 10 to 15 percent above actual expenditures in 1964. Industries planning substantial programmes in 1965 include electric power, pulp and paper, chemicals and financial and commercial services. If allowance is also made for a sustained upward trend in public and institutional construction and a further moderate rise in housing, total private and public investment would be up nearly 10 per cent.

This continuing strength in capital investment, while itself contributing new demand stimulus, is, at the same time, a reflection of the future market expectations of the business community. A capital programme of the magnitude now in prospect bodes well indeed for both the near and longer-term future. Meanwhile, the steady upward trend of personal incomes adds to consumer demand and further reinforces the forward momentum in the economy.

Prosperity, of course, is not without its own special challenges. Traditionally, economic development has seldom proceeded smoothly, and periods of rapid expansion have usually been followed by contraction. The current expansion has already lasted beyond the normal span of a cyclical upswing. Thus, as growth proceeds, it will be important to avoid the kind of unfounded optimism and speculative excess which so often in the past have led to maladjustment and decline. Yet there is no need to assume the inevitability of cyclical fluctuation to the degree experienced in the past. Growth can be sustained through constant vigilance and sufficient readiness on the part of all groups in the community to adapt to changes in the economic environment.

A HAZARD OF PROSPERITY

For the Canadian economy an additional obstacle to sustained growth is its vulnerability to external

imbalance in conditions of mounting prosperity. There is a strong tendency in the Canadian economy for rising incomes to bring a more than proportionate increase in imports. In recent years of rapid growth, this propensity toward external imbalance has been held in check by special measures and far-reaching programmes designed to improve competitive performance in both domestic and foreign markets. Nevertheless, in 1964 imports rose more than domestic shipments for the first time in several years. This diminution in the share of the overall domestic market supplied by domestic producers was offset by a truly remarkable performance in foreign markets. Prospects of a larger investment programme next year and increased domestic demands generally could result in a sharper rise in imports than is likely to occur in exports. In fact, a continued upward trend of economic activity in Canada may well entail a larger deficit in our external balance on goods and services.

A larger external deficit on current account serves a constructive purpose if it is required to support a more rapid pace of sound economic development. On the other hand, growing external imbalance could also reflect an inability to adapt to the changing market patterns which emanate from our own prosperity and from new developments affecting both the needs and productive capabilities of our trading partners. For Canadian producers fully to exploit available opportunities, especially in the more dynamic manufactured-product markets, new and sustained initiatives are required on many fronts. The Department of Trade and Commerce, in co-operation with provincial departments and trade associations, has broadened and intensified its promotional work with the business and export community. Improved access to external markets is a key factor in the future expansion of Canadian exports. The Canadian Government therefore attaches much importance to a successful conclusion of the "Kennedy-round" trade negotiations as a whole, and to its objective of achieving greater Canadian participation in the North American automobile market.

In recent years great economic advances have been made by Canada. The task now at hand is to sustain this growth and avoid those imbalances and maladjustments which can so easily and imperceptibly infiltrate and undermine the sinews of prosperity. Substantial as our recent achievements have been, the greater challenge still lies ahead.

DISASTER AID TO INDIA, CEYLON

The Secretary of State for External Affairs recently announced that the Canadian Government would make available to India and Ceylon through the Canadian Red Cross Society \$40,000 in relief assistance to help these countries repair the damage done by the recent cyclone and tidal-wave disaster. In addition to this assistance, the Canadian Government is investigating the possibility of providing further help to Ceylon and India possibly in the form of building materials for reconstruction and rehabilitation.

Washington, D.C., an outstanding authority on allocation of natural resources for recreational use. Individuals and agencies working independently had done limited work on the subject of sport fishing on the economy, but this work had never been coordinated. The recent symposium provided for an exchange of ideas and served as a starting point for future investigations and discussions on the evaluation and other economic aspects of sport fishing. The symposium was organized and conducted by the U.S. Fish and Wildlife Service. Taking part in the discussions were representatives of interested agencies of the federal and provincial governments, universities and other agencies that had undertaken work in this field.