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**STRENGTHENING CANADIAN COMPETITIVENESS
THROUGH COMMUNICATIONS AND CULTURE**

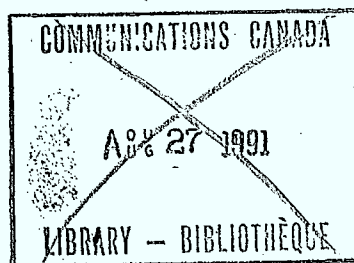
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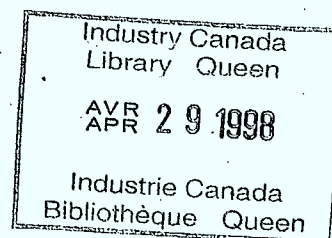
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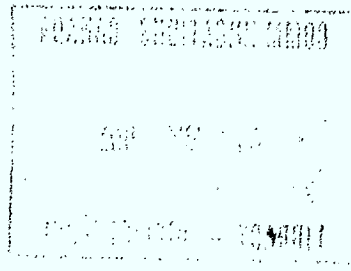
**STRENGTHENING CANADIAN COMPETITIVENESS
THROUGH COMMUNICATIONS AND CULTURE**

REPORT ON THE WORKSHOP
HELD ON FEBRUARY 27, 1991
HULL, QUEBEC



*Ce rapport est aussi disponible
en Français*

Strategic Policy Planning
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June 1991



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THE COMPETITIVE CHALLENGE:

"In our increasingly competitive world, there is no room for complacency; and there is no safe hiding place for uncompetitive industries or countries. We must adapt to the new world reality or fall behind in the effort to preserve and enhance our future prosperity."

THE HONOURABLE MICHAEL WILSON
FORMER MINISTER OF FINANCE
BUDGET SPEECH
FEBRUARY 1991

Executive Summary

The DOC Strategic Planning Workshop of February 27, 1991, entitled Strengthening Canadian Competitiveness Through Communications and Culture, considered the contributions that communications and culture can make to enhancing the competitiveness of the Canadian economy and the objectives that DOC should set for itself to maximize those contributions.

A MATTER OF RELATIVITY

Workshop discussion on many occasions emphasized that competitiveness is a relative measure. While Canada's quality of life and economic prosperity is the envy of some, it is seen to be declining relative to other countries. As evidenced by the growth in regional trading blocs, the number of new and stronger competitors, the fading influence of national boundaries and the growing power of multinational transnational companies, Canada is being thrust into a global market place. It was emphasized that in this type of environment, it is no longer sufficient to be good. To survive, we must be better. Competitiveness is therefore a relative measure of how much better, or worse off, we are.

THE "C" WORD

National competitiveness is an amalgamation of many factors. It was suggested that competitiveness could be distinguished at the firm, industry, regional and

national levels, but the competitiveness at all of these levels is also inextricably linked. Within this context, any measure taken to enhance competitiveness at any one of these levels must be considered in terms of their potential impact at other levels. The challenge for government is to enhance national competitiveness while balancing the needs of individual regions, industries and firms.

AVOIDING THE ARGENTINA SYNDROME

It was pointed out at the workshop that Canada's standard of living is declining in real terms relative to our competitors. In the past, Canada's competitive edge has been based on its abundance of natural resources. A good supply of physical resources is no longer essential in a global information economy; comparative advantage based on factor costs will not always be successful. It was suggested that a continued reliance on former strength may in fact prevent Canada from developing an internationally competitive economy in today's terms. What is needed is a national strategy to create the competitive advantages needed in the emerging world economy.

THE THREE CRITICAL ELEMENTS

While it was noted that a number of factors are required to achieve that national strategy, discussion at the workshop identified three essential elements where Canada appears to be most vulnerable: the availability of a skilled workforce, the absence of a "technology culture, and the existence of an effective productivity infrastructure". The challenge for DOC is to establish forward looking programs and policies which would contribute to the strengthening of Canada's capabilities in these areas.

THE SPECIAL ROLE OF TELECOMMUNICATIONS

Telecommunications is an essential element of Canadian competitiveness in a global economy where the rapid integration of telecommunications, computers, broadcasting and information publishing is creating new opportunities for efficiency and productivity improvements. While the objective of ensuring equitable access to telecommunications at affordable prices is still valid, the Department should strongly consider placing greater emphasis on helping the Canadian economy as a whole in making use of advanced communications services and technologies. The importance of research and development therefore should also be emphasized. The management of the radio frequency spectrum and the development of communications standards were cited as "unsung heroes" of Canada's telecommunications system.

CONCLUSION

Workshop discussion suggested the need to develop a clear economic agenda for the Department, focusing on initiatives that support productivity growth. Policies and programs should ensure, not only the availability of advanced telecommunications services, but also provide the support and assistance required by users to develop and adopt these services. It was pointed out that investment strategies designed to improve productivity are geared to the longer term and will be a tough sell in a climate of fiscal restraint.

For further information on the workshop or on other workshops organized by DGSP, please contact Brenda Patterson at 990-4307 or David Waung at 990-4174.

STRENGTHENING CANADIAN COMPETITIVENESS
THROUGH COMMUNICATIONS AND CULTURE

INTRODUCTION

Hardly a day goes by without a reminder in the nation's newspapers that Canada's current competitive edge, which has sustained us through the post war decades, is fast becoming irrelevant in the emerging global economy. While opinions are plentiful on the root cause of Canada's decline in world competitiveness, there appears to be little agreement on a course of action to stem this slide. The only consensus that has emerged is that there is no one single solution to the problem and that the challenge of enhancing Canadian competitiveness must be dealt with on many fronts.

The DOC workshop of February 27, 1991, entitled **Strengthening Canadian Competitiveness Through Communications and Culture**, examined the new realities that are redefining the foundations of national economic competitiveness and the roles of communications and culture in this new paradigm. Particular emphasis was given to what strategic objectives the Department should set for itself to ensure that maximum contributions are made to Canada's competitiveness agenda.

The day-long workshop was chaired by **Roger Collet**, Executive Director for DOC's Central Region. The morning session included a presentation by **Michael McCracken**, President of Informetrica, and a panel discussion by senior departmental staff. The afternoon session consisted of an address by **Giles Gherson**, Ottawa Bureau Chief of the Financial Times, followed by discussion groups. (See attached attendance list and agenda)

The workshop coordinators would also like to thank **Prabir Neogi** for his advice and assistance in the preparation of this report.

Finally, this workshop would not have been possible - or fun - without the participation of all those who attended and who shared their thoughts and ideas.

A MATTER OF RELATIVITY

Competitiveness is a relative measure. It is a comparison of the strengths and capabilities of competitors in a chosen field of endeavour. There is little doubt that Canadian strengths and capabilities, as measured in our quality of life and economic prosperity, have experienced steady improvements in the last four decades. However, over the last decade, relative to the rate of improvement in other countries, we are rapidly losing ground.

In economic terms, this means that although Canadian markets and productivity are still growing, they are expanding at a much slower pace than those in most other nations. Some economic experts have gone so far as to say that the continuation of this trend will render Canada a third world country with its accompanying standard of living. Even the less strident economists agree that our industries and economy are not as strong and vibrant as those of other industrialized countries.

While this relative weakness would be of little consequence if national economies could be isolated from each other, this is definitely not the case. The globalization of world markets are thrusting all nations into the same economic arena. Evidence of this are plentiful:

- Twenty-one of the twenty-two richest industrialized countries in the world, with the exception of Japan, currently belong to regional trading blocs. These include the European Community, the Asia-Pacific countries, and the Canada-U.S. Free Trade Agreement.

- New and stronger competitors have entered the global marketplace. Japan and certain countries in Western Europe and the Pacific Rim have experienced spectacular gains in export growth, capital flows and their domestic economies. The United States meanwhile has experienced a continuing decline in its share of world trade and of its previous world-wide economic dominance.
- Multinational or transnational corporations are quickly becoming the dominant force in world trade and are challenging, and in some cases superseding, the authority of national governments.
- The fading influence of national boundaries are no where more evident than in the globalization of capital markets. The deregulation of financial markets and the use of sophisticated communications technologies have led to a situation where the geographic source of monies is almost irrelevant. Global telecommunications networks and electronic funds transfer systems have made capital flows virtually instantaneous - hundreds of billions of dollars are transferred daily between the world's major financial centres. National monetary and fiscal policies must now take heed of the effect they may have on investment decisions half way around the world.
- Not only are firms selling in the global market place, consumers are eagerly buying from it. The workshop was told that today's consumers are better informed and more demanding about the quality of products and services they consume. They have ready access to what the world has to offer, and are prepared to buy from which ever nation that offers the best value.

In this type of global market place, where national boundaries are decreasing in significance, it is no longer sufficient to be good. To survive in this environment we must be better! Competitiveness is therefore a relative measure of how much better, or worse off, we are.

THE "C" WORD

Given that competitiveness is a relative measure, workshop participants questioned what are the main elements that should be considered when analyzing "National Competitiveness". Should the comparison be based on national trade statistics? economic performance as measured by GDP? or more general "quality of life" factors? It was suggested that "flowers and poets" are just as important in the comparison as cold economic statistics.

Even on a purely economic level, national competitiveness is an amalgamation of many factors. Mr. McCracken suggested that one should distinguish between competitiveness at the firm, industry, regional and national levels:

- **At the firm level**, competitiveness means that individual companies can produce and sell goods or services in international or domestic markets on a sustainable basis, earning sufficient profit to provide a return to investors comparable to other domestic or foreign firms in the same business. An example of this is the performance of Northern Telecom in the domestic and world markets.
- **At the industry level**, competitiveness is defined as sustained viability and returns to investment of an industry segment as compared to similar industries in other countries or to other industry segments in the same country. Examples include the performance of the Canadian textile industry as compared to the textile industry in Europe, or as compared to the pulp and paper industry in Canada.
- **Regional competitiveness** is of particular importance in Canada. It again refers to the long-term viability, with returns to the factors of production, sufficient for them to contribute towards the economic prosperity of a geographic region. The competitiveness of the Atlantic Provinces as compared to the Prairies is an example of regional comparisons.
- **National competitiveness**, as discussed earlier, refers to a whole range of factors affecting national prosperity, social well being, and quality of life considerations.

The important point to note here is that competitiveness at all these levels is inextricably linked. Given this interconnectivity, measures put in place to enhance competitiveness at any one of these levels could actually work against competitiveness at other levels instead of complementing it. Monopolistic market control may enhance competitiveness at a firm level, but the inefficiencies that can be tolerated under these conditions can actually lower competitiveness at an industry level. Similarly, trade measures to protect regional competitiveness may weaken national competitiveness.

As Mr. McCracken put it: "Is Canada greater than the sum of its parts?" The challenge for government is to enhance national competitiveness while balancing the needs of individuals regions, industries and firms.

AVOIDING THE ARGENTINA SYNDROME

Giles Gherson pointed to the striking similarities between Canada's economy today and that of Argentina's before its rapid decline. Like Canada, Argentina once enjoyed a high standard of living, had a well educated workforce, and was blessed with an abundance of natural resources. Despite these advantages, Argentina lost the place it once held among the major economic powers of the world. Workshop participants were reminded that no matter what advantages a nation possesses, it cannot be complacent. Constant improvements are necessary in today's competitive world environment just to maintain our current standard of living.

Economic experts note that productivity is one of the chief determinants of economic prosperity. As Canadian productivity soared in the 50's and 60's, so too did Canadian standard of living as measured in real net national income per capita. However, in the last 20 years productivity growth in Canada has fallen off significantly and our standard of living has not been improving in real terms. In fact, if compared with the situation of our trading partners, Canadian standard of living has been declining.

In 1970, Canada ranked second to the United States in comparative national

manufacturing productivity among the major industrialized nations (the United States, United Kingdom, France, Germany, Japan, Italy, and Canada). By 1988, Canada ranked fifth among the seven.

Productivity depends on the quality of human and capital resources and on the efficiency of the economy in making use of them. It could be argued that Canada's productivity, and hence our competitive edge, has traditionally been based on the quality of our capital - our abundance of natural resources. While this has served us well in the past, some experts actually feel that it will hamper Canada from developing skills and capabilities needed in today's open economy.

Michael Porter, Harvard Business School Professor and author of the book The Comparative Advantage of Nations, argues that a good supply of physical resources is not essential for economic growth. In fact, he believes that **countries such as Canada have too many resources and this has prevented us from becoming internationally competitive in industrial products**. Porter argues that reliance on a comparative advantage based on factor costs will not be successful because somewhere there will always be a location or a country where factors costs are cheaper.

Relatively static factors, such as the availability of natural resources, once considered a country's "comparative advantage" can now largely be compensated for. Japan, Korea and others have demonstrated that countries with little natural resources of their own, can create their own comparative advantage through acquiring technical, industrial and managerial skills. In an open global economy, an abundance of natural resources cannot always compensate for fundamental economic inefficiencies.

Workshop participants were told that nations can no longer rely on natural endowments to ensure future economic prosperity. What is needed, we were told, is a national strategy to create the competitive advantages needed in the emerging world economy.

THE THREE CRITICAL ELEMENTS

In reviewing the essential elements of such a national strategy, workshop participants noted three areas where Canada will be the most vulnerable: the availability of a skilled workforce, the absence of a "technology culture" that values and accepts innovations, and the existence of an effective "productivity infrastructure" to support economic efficiencies.

- 1 - **A Skilled Workforce:** Skilled labour has become one of the few elements of production where advanced industrialized nations can create and retain an advantage. Technology intensive products and services are dominating a growing proportion of today's business and consumer markets. Production of these high value products is also becoming more technology and skills intensive. Business must adopt the use of high-technology equipment and processes, but it must also have the human capital skills to use them. Statistics Canada projects that during the 1986-2000 period, the proportion of Canada's overall employment requiring high skill levels (defined as more than 12 years of education and training) will rise from 44% to 64%, while the proportion of employment requiring low skills (nine to 12 years of education) will fall to 35% from 56%.

Canadian businesses are already experiencing human resource shortages in a knowledge-intensive economy where the well-educated countries win, and the poorly educated lose. Lester Thurow, Dean of The Sloan School of Management at M.I.T. has noted that, counter to popular belief, human resources tend to stay relatively fixed while natural resources, capital and technology have become highly mobile. As such, **people are a strategic investment for governments and for business, particularly now when much broader education skills are required to adopt new technologies.**

The challenge of preparing students will be complicated by the fact that over 20% of Canada's adults today are functionally illiterate. All of this will require an unparalleled degree of innovation and cooperation between private industry, governments, and educational institutions. The workshop participants concluded from discussions, that the federal government must provide leadership and

support toward the development of the skilled managers and employees required by globally competitive companies.

DOC could have an important role to play in the area of training and retraining, both through distance education applications and the use of multi-media technologies.

- 2 - The lack of *technology culture* has also hindered Canada's economic growth and prosperity. Technological innovation, whether it expresses itself in the development of new products, more efficient production processes or marketable expertise, has become a key determinant of Canadian competitiveness.

Its value lies not only in its application in the highly competitive technology intensive industries, but also in its capacity to reinvigorate manufacturing and other industrial operations. As such, it has become a created comparative advantage in international trade.

The critical importance of R&D to the innovative health and future of both countries and firms goes unchallenged. Yet investment levels by Canadian governments, business and universities are well below those of our competitors.

As noted by one of the panellists, the Canadian effort to promote technological innovation as measured by expenditures on R&D as a percentage of Gross Domestic Product (GDP), is inferior to that of its major competitors. Furthermore, the investment by Canadian industry in R&D falls well below that of other major industrialized nations. Both as a funder and a performer of R&D, the Canadian business sector as a whole trails behind its international competitors by a significant margin. This is important given that a high level of investment by industry in R&D indicates the presence of a business sector which is actively seeking out, and accepting to exploit opportunities to use science and technology to develop new goods, more efficient production processes and marketable products, services and expertise.

In addition to its poor performance in R&D expenditures, the rate of

development and the rate of adoption of new technology in Canada is slower than in other industrialized countries such as the U.S., Japan and Western European countries. Workshop participants expressed particular concern with the low level of recognition within Canada of the productivity achievements brought about through the application of communications and information technologies.

Giles Gherson noted that at the root of Canada's poor performance in R&D and innovation may be our fundamental attitudes towards technology. He suggested that **"creative solutions are elusive because poor economic performance has cultural roots"**. Until Canadians recognize the importance of technology to Canada's future, our low investment in R&D and slow usage of innovative technology cannot be resolved.

- 3 - ***A Productivity Infrastructure:*** In addition to human and technological skills, Giles Gherson noted that competing in the new global economy will require building a new **infrastructure for competitiveness**. Participants were reminded that Canada's tax systems, financial markets, communications and transportation networks, and trade policies are all part of our productivity infrastructure.

Evidence of the massive effort required to build a modern and competitive infrastructure to enhance economic efficiency is plentiful. For example, nations around the world are taking decisive steps to deregulate the transportation industry, restructure financial markets, redefine telecommunications policies and remove restrictive trade barriers. Even the historical events currently under way in Eastern Europe could be seen as efforts to redress the limitations of antiquated productivity infrastructures.

It was noted that one of the essential components of this productivity infrastructure, in today's information economy, is the capacity to communicate and access information and knowledge. In his recent book Power Shift, noted author Alvin Toffler argues that knowledge and information are key to economic growth in the 21st Century. **He believes that the struggle for power will increasingly turn into a struggle over the distribution of and access to knowledge.** Canada's information infrastructure comprises our publishing

industry, broadcast networks, telecommunications systems, patent legislation and copyright policy. **The challenge for DOC is the establishment of forward looking programs and policies in these areas so that they contribute fully to Canada's economic prosperity.**

THE SPECIAL ROLE OF TELECOMMUNICATIONS

Participants were told that while telecommunications have always been an important element in Canada's economy, its role in ensuring future economic prosperity is creating new opportunities for efficiency and productivity improvements. These improvements are especially critical in today's global economy. By allowing firms to produce and deliver products and services more efficiently, telecommunications are services industries enhancing competitiveness through improved productivity. The traditional barriers of space and time have become significantly less relevant. The financial, airlines, stock markets, and not surprisingly the telecommunications industry itself, have been leaders in the application of advanced communications services. The example set by these sectors and others has led, in Canada and elsewhere, to the growth of a vocal and well organized community of business users demanding a telecommunications infrastructure and associated services comparable to their competitors worldwide.

In considering strategic objectives for communications and culture in enhancing Canadian Competitiveness, workshop participants returned to the different levels of competitiveness as described by Mr. McCracken.

It was noted that the telecommunications sector contributes to Canadian competitiveness in two ways. First as a strong and vibrant industry in its own right, and secondly as a supplier of essential services and products needed to ensure efficient operations in all segments of the economy.

Workshop participants questioned whether DOC's current programs and policies are focused too much on the telecommunications industries both as service providers and equipment manufacturers. If telecommunications is

indeed an essential element of Canadian industrial competitiveness, is DOC doing enough to help the Canadian economy as a whole in making use of advanced communications services and technologies?

It was noted that the fundamental objective for the Department in telecommunications has always been to ensure that all Canadians have access to the best communications services in the world at affordable prices. While this objective is still valid, the explosion of wide range of possible services coupled with unique and innovative requirements of individual users, made it necessary to clarify and expand on the objective statement. It was suggested that DOC's responsibility to enhance Canadian economic strengths through the use of advance communications services should be stated more explicitly.

The emphasis on meeting the needs of telecommunications users was strongly endorsed by workshop participants. It was felt that the role of the telecommunications system is to enhance the productivity, thus the competitiveness, of its users. Only through effective usage of telecommunications services will Canadian productivity be truly enhanced.

A panel of Departmental experts outlined for the workshop the tools DOC has at its disposal to meet the objective of a modern competitive network in Canada. Participants were told that telecommunications policies, industry programs and research and development are all important measures to ensure the availability of needed communications services.

In terms of the physical telecommunications infrastructure, the workshop was reminded that an enormous investment has been made in Canada's current facilities primarily by the telecommunications carriers and that huge amounts of capital are required, on an ongoing basis, to maintain and upgrade these facilities. As of January 1, 1990, there were 14.7 million access lines in use in Canada. Total telecommunications carriers plant investment was around \$35 billion.

With the implementation of new telecommunications legislation, government will be assuming the leadership role in creating a national policy environment which enables and encourages continued private sector investment in that infrastructure.

However, it was noted that Canada's research and development effort is still significantly inferior to those of our trading partners.

If this situation is allowed to continue, not only will Canada risk losing one of its premier high tech industries, it will also jeopardize the availability of innovative telecommunications services essential for competitiveness.

Workshop participants also noted the importance of two "unsung heroes" of today's telecommunications system - the management of the radio frequency spectrum and the development of communications standards.

The frequency spectrum is taking on much greater value as it becomes an increasingly important resource for the delivery of advanced communications services for business and individuals. By definition, spectrum allocation is international in scope. Our domestic choices, in terms of Canadian economic and cultural demands for spectrum cannot be made in isolation from decisions taken in international fora which affect both us and our competitors worldwide. DOC has the authority to allocate and regulate this finite resource on a national basis. With this authority comes the responsibility to achieve optimum efficiency and effectiveness. This has become evermore critical and evermore difficult with the explosion of innovative developments in the application of wireless communication technologies and services. It was noted that current efforts to establish a long range strategy for the allocation of this scarce resource is crucial not only for the telecommunications industry but for future Canadian economic prosperity as well.

Telecommunications standards have been working so well that most people do not realize they exist. It could be said that while the invention of the telephone was a great technological achievement, the existence of today's global telecommunications networks is a far greater triumph in standardization. It is indeed ironic that the path towards greater diversity in innovative telecommunications services lies with stronger efforts in international standardization. With the global nature of products and services, the adoption of certain standards can also be a competitive advantage to a particular industry or set of industries. Because of the importance of standards for the future of

Canada's telecommunications networks and services, DOC's standards strategy will have an important bearing on Canadian economic productivity and prosperity.

CONCLUSION

The workshop examined some of the main factors that are affecting Canadian competitiveness in today's global economy. Special attention was placed on the role communications can play in enhancing future Canadian prosperity. The clear conclusion that emerged from the discussion was that DOC has an important responsibility not only in ensuring the availability of advanced telecommunications services, but also in helping users develop and adopt these services for their particular needs.

Giles Gherson reminded participants that competitiveness is all about focusing resources in key areas. His message to DOC was not to abdicate its responsibility to facilitate the modernization of the telecommunications infrastructure and to promote the use and innovative applications of communications and information technologies and services. He warned that by their very nature, investment strategies designed to improve productivity are geared to the longer term. They will therefore be a "tough sell", particularly when the economy is not strong and the government must operate in a climate of fiscal restraint.

Lester Thurow, in a recent presentation to the Policy Forum, told the audience that countries that continue to deny the existence of structural and systemic problems in their economic and social systems in the face of the global economy, will never come up with and impose the necessary solutions. We illustrated this by giving what he calls the 1990's definitions of an optimist and a pessimist. An optimist now is somebody who denies that a problem exists, that everything is or will be O.K.; a pessimist on the other hand is someone who says we have a problem, but that there is a solution(s). According to Thurow's definition, the favoured position for DOC to take would be that of a pessimist!

APPENDIX I

**REGISTERED PARTICIPANTS FOR
THE COMPETITIVENESS WORKSHOP**

LIST OF PARTICIPANTS

STRENGTHENING COMPETITIVENESS THROUGH COMMUNICATIONS AND CULTURE

SADM

Sarkar, Eileen (DGSP)
Théorêt, Yves (DPG, DGSP)
Hollier, Patrick (DPG, DGSP)
Farmer, Viviane (DGSP)
Durand, Michel (DGSP)

Dufour, Marie-Christine (DGIS)
Markell, Hal (DGIS)
McLaughlin, Terrence (DGIS)
Miville-Dechéne, Josée (DGIS)

Rainboth, Dan (DIAB)

Graham, Bill (DPE)

Cockerill, Kate (DGIR)
Chatillon, Elisabeth (DGIR)
Tritt, Robert (DPT, DGIR)
Perrin, Stephanie (DPT, DGIR)
Tiger, Michael (DPT, DGIR)
Baillargeon, Phil (DPT, DGIR)
Leduc, Pierre (DPT, DGIR)
Doran, Janis (DIA, DGIR)
Lepage, Raymond (DID, DGIR)
Vallerand, Charles (DID, DGIR)
Jang, Jennifer (DID, DGIR)
Skok, Vladimir (ICP, DGIR)
Kennedy, Joanne (ICP, DGIR)
Lajeunesse, Monique (DCC, DGFP)
Thomas, Dave (DAP, DGFP)
Cloutier, Nicole (DLS)
Kratchanov, Denis (DLS)
Black, Heather (DLS)

ADMAH

Le Gal, Yvette (DHP, DGMH)
Street, Linda (DHP, DGMH)
Tegtmeyer, Thomas (DRS, DGAP)
Tremblay, Claudine (DRS, DGAP)
Séguin, Denise (DCIP, DGAP)

Gruchy, Charles (DGCCI)
Rottenberg, Barbara (CHIN)

ADMCM

Seckler, Isabelle (DLO, DGHR)
Giannetti, Anne-Marie (DPR, DGHR)
Munro, Wally (DGHR)
Levesque, François (DDA, DGFM)

ADMCP

Latrémouille, Susane (DSIS, DGTP)
MacEwen, Doug (DSIS, DGTP)
Hamilton, Alan (DSIS, DGTP)
Melnyk, Max (DSRS, DGTP)
Warnes, David (DSRS, DGTP)
Mozes, Dora (DFR, DGTP)
Witt, Jan (DFR, DGTP)
Thuswaldner, A. (DFR, DGTP)
Hughes, Tom (DNS, DGTP)
Durr, Larry (DAR, DGBP)
Ironsides, Ian (DAR, DGBP)
Simpson, Richard (DDI)
Rivest, Thérèse (DDI)
Sanson, Gareth (DDI)
Dubitsky, Will (DDI)
Catafard, Denis (DCT, DGCI)
Perrier, Denise (DFVP, DGCI)

ADMRS

Tsang, Eric (DGCP)
Scott, Lewis (DAI, DGCP)
Croskery, Lorraine (DAI, DGCP)
Laughton, Mary Frances (DAI, DGCP)
Campbell, Louise (DAI, DGCP)
Baldwin, Susan (DTP, DGCP)
Bourassa, Richard (DTP, DGCP)
Hébert, Claude (DTP, DGCP)
Pietrykowski, Winnie (DMS, DGCP)
Neogi, Prabir (DMS, DGCP)
Fournier, Luc (DMS, DGCP)
McDonald, Helen (DPM, DGCP)
Skomorowsky, Ed (DPM, DGCP)
Mahoney, Bev (DPP, DGCP)
John Chang (DGEP)
Bhai, H. (DCE, DGEP)
Morley, Ronald J. (DCN, DGBT)
MacMillan, Don (DCN, DGBT)
Phillips, Dorothy (DBR, DGBT)
Akgun, Metin (DIP, DGBT)
Taylor, Craig (MSEN)
Breithaupt, R.W. (DGRC)
Ladouceur, James (DCM, GTA)
Dutch, George (DCM, GTA)
Duval, Paul A. (DCI, DGIM)
Ho, Ben (DSI)
Claude, Marie (DOST, DGRR)
Begley, Ron (DGBR)

SMAQ

Lavoie, Richard (DLR, DGRI)
Deschênes, Lucie (DLR, DGRI)
Picot, Jocelyne (DLR, DGRI)
Drouin, Marcel (DGRI)
Gambino, P. (DGDR)

REGIONS

Kilarski, H.V. (EDC)
Desormeau, Nancy (EDC)
Hamm, Don (Calgary District Office)
Deguefé, Belaineh (RCD)
Hurley, Catherine (ROD)
Boucher, Al (RADT)

PANELLISTS/ORGANIZERS

Roger Collet
Michael McCracken, President, Informetrica
Giles Gherson, Ottawa Bureau Chief, Financial Times of Canada
David Mulcaster
Gaston Blais
Michael Helm
David Waung
Brenda Patterson
M. Sharon Jeannotte
Suzanne Loranger
Suzy Beauregard

APPENDIX II

WORKSHOP AGENDA

Strategy & Plans

**STRENGTHENING CANADIAN COMPETITIVENESS
THROUGH COMMUNICATIONS AND CULTURE**

Wednesday, February 27, 1991
8:30 - 4:30
Ottawa Room, Place du Portage

Agenda

- 8:30 - 9:00** Registration and Coffee
- 9:00 - 9:10** Introduction to 1991 Workshop Series -
David Waung, Director, Strategic Policy Planning
- 9:10 - 9:20** Chairperson's Opening Remarks

We are witnessing a transformation of the global economy with more open markets not just for traditional commodities, but also for capital, ideas and culture. This transformation is redefining the basis for national economic competitiveness and will challenge the structure of Canada's regional economies. What is the role of communications and culture in this new paradigm? What strategic approaches should the Department adopt to contribute to Canadian economic competitiveness?

CHAIRPERSON:

Roger Collet, Executive Director, Central Region

- 9:20 - 10:15** *COMPETITIVENESS IN THE GLOBAL ECONOMY -
WHAT DOES IT MEAN FOR CANADA?*

How is the restructuring of the global economy influencing traditional definitions of competitiveness? How has the increasing trade in services and information affected Canadian competitiveness?

KEY NOTE SPEAKER:

Michael McCracken, President, Informetrica

QUESTIONS AND DISCUSSIONS WITH WORKSHOP PARTICIPANTS

10:15 - 10:45 Coffee Break

10:45 - 12:30 ***Competitiveness in the Global Economy:
What Does it Mean for DOC?***

How is increasing global competitiveness affecting communications and culture in Canada? Have DOC programs and policies kept pace with these changes?

PANEL SPEAKERS:

David Mulcaster, Director General, Communications
Development and Planning Branch, ADMRS

Gaston Blais, Director General, Arts and Policy Planning Branch, ADMAH

Michael Helm, Director General, Broadcasting Policy, ADMCP

PRESENTATIONS, QUESTIONS, AND DISCUSSIONS WITH WORKSHOP PARTICIPANTS

12:30 - 1:30 Lunch

1:30 - 2:15 ***Can Government Really Influence National Competitiveness?
At What Cost?***

With the restructuring of the global economy, industry and markets have undergone fundamental changes. Have government organizations kept pace with these developments? Can governments reconcile the demands for economic competitiveness with their social and cultural objectives?

FEATURE SPEAKER:

Giles Gherson, Ottawa Bureau Chief, Financial Times

2:15 - 3:45 Working Group Discussions

A STRATEGIC APPROACH FOR DOC:

Where should communications and culture fit in the government's overall agenda to improve Canadian competitiveness?

What Strategic Objectives should we set for the Department so that communications and Culture can contribute, to the maximum extent possible, to Canadian competitiveness?

What are the major factors that will influence our ability to achieve these objectives?

(Coffee will be served during the discussions)

3:45 - 4:30 Presentations by Working Groups, Discussion and Conclusions.

26 February 1991

**RENFORCER LA COMPÉTITIVITÉ DU CANADA
PAR LES COMMUNICATIONS ET LA CULTURE**

le mercredi 27 février 1991
de 8 h 30 à 16 h 30
Salle Outaouais, Place du Portage

Ordre Du Jour

8 h 30 - 9 h Inscription et café

9 h - 9 h 10 Présentation de la série d'ateliers de 1991 -
David Waung, directeur, Planification stratégique des politiques

9 h 10 - 9 h 20 Remarques préliminaires du président

Le domaine de l'économie change. Nous assistons à une transformation de l'économie mondiale; les marchés deviennent plus ouverts non seulement pour ce qui est des produits traditionnels, mais également pour ce qui est des capitaux, des idées et de la culture. Cette transformation redéfini la base de la compétitivité économique nationale et mettra en question la structure économique du Canada. Quel est le rôle des communications et de la culture dans cette nouvelle conjoncture? Quelles approches stratégiques le Ministère devrait-il adopter pour contribuer à la compétitivité économique du Canada?

PRÉSIDENT :

Roger Collet, directeur exécutif, Région du Centre

9 h 20 - 10 h 15 *COMPÉTITIVITÉ DANS L'ÉCONOMIE MONDIALE -
QU'EST-CE-QUE CELA SIGNIFIE POUR LE CANADA?*

Comment la restructuration de l'économie mondiale influence-t-elle les définitions traditionnelles de la compétitivité? Comment le commerce croissant dans les domaines des services et de l'information a-t-il influé sur la compétitivité du Canada?

CONFÉRENCIER PRINCIPAL :

Michael McCracken, président, Informetrica

QUESTIONS ET DISCUSSIONS AVEC LES PARTICIPANTS À L'ATELIER

10 h 15 - 10 h 45 Pause-café

10 h 45 - 12 h 30 ***LA COMPÉTITIVITÉ DANS L'ÉCONOMIE MONDIALE -
QU'EST-CE QUE CELA SIGNIFIE POUR LE MDC?***

Comment l'accroissement de la compétitivité mondiale affecte-t-il les communications et la culture au Canada? Nos politiques et nos programmes ont-ils suivi les changements?

PARTICIPANTS À LA TABLE RONDE:

David Mulcaster, directeur général, Développement et planification des communications, SMARS

Gaston Blais, directeur général, Arts et planification des politiques, SMAAP

Michael Helm, directeur général, Radiodiffusion, SMAPC

EXPOSÉS, QUESTIONS ET DISCUSSIONS AVEC LES PARTICIPANTS À L'ATELIER

12 h 30 - 13 h 30 Déjeuner

13 h 30 - 14 h 15

Le gouvernement peut-il vraiment influencer sur la compétitivité du pays? À quel prix?

La restructuration de l'économie mondiale a entraîné des changements profonds de l'industrie et des marchés. Les organismes gouvernementaux ont-ils suivi le rythme de ces changements? Le gouvernement peut-il concilier les appels à la compétitivité économique et leurs objectifs sociaux et culturels?

CONFÉRENCIER:

Giles Gherson, Chef du bureau d'Ottawa, "Financial Times"

14 h 15 - 15 h 45

Discussions en groupes de travail

APPROCHE STRATÉGIQUE DU MDC :

Quelle place les communications et la culture devraient-elles avoir dans le programme général du gouvernement visant à accroître la compétitivité du Canada?

Quels objectifs stratégiques devrions-nous établir pour le Ministère afin que les communications et la culture puissent contribuer au maximum à la compétitivité du Canada?

Quels sont les facteurs majeurs qui influenceront notre capacité d'atteindre ces objectifs?

(Un café sera servi pendant les discussions.)

15 h 45 - 16 h 40

Compte rendu des discussions et des conclusions des groupes de travail

Le 26 février 1991

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