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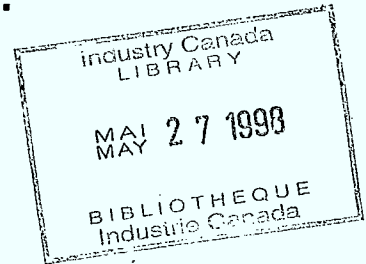
**The Changing Face of Communications:  
New Demands and Expectations  
of a Strategic Resource**

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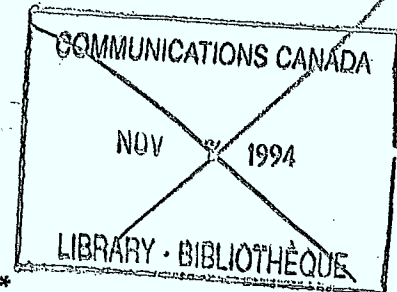
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**The Changing Face of Communications:  
New Demands and Expectations  
of a Strategic Resource**



**Report on the Workshop  
held on November 24, 1992  
Palais des congrès  
Hull, Quebec**



\*\*\*\*\*  
*Ce rapport est aussi disponible  
en français*  
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**Strategic Policy Planning  
Strategy and Plans Branch  
Communications Canada  
January 1993**

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**ACKNOWLEDGEMENTS**

The Strategic Planning Workshop, "The Changing Face of Communications: New Demands and Expectations of a Strategic Resource", benefited from the participation of many individuals from within and outside the department.

I am especially grateful to **Ned Ells**, the Director of Corporate Priorities, who agreed to chair the Workshop, and to **Paul Racine**, the Assistant Deputy Minister of Communications Policy, who set the stage with his opening remarks. I would also like to thank all the speakers and panelists (see Appendix 1), as well as those who lent their support to the idea of the Workshop and offered many useful suggestions regarding the agenda and speakers.

The event would not have been possible without the efforts of organizing team, so special appreciation must go to **Philippe Baillargeon, Sharon Jeannotte, Nathalie Chamberland and Lee Stethem**.

Finally, I wish to thank all those who attended the Workshop and who took the time to challenge the speakers, share their ideas and offer their opinions. Without you, strategic planning in DOC would be much more difficult and, certainly, much less rewarding.

David Waung  
Director  
Strategic Policy Planning  
Communications Canada

### **EXECUTIVE SUMMARY**

While participants at the strategic workshop on "The Changing Face of Communications: New Demands and Expectations of a Strategic Resource" were reassured by the words of one speaker, who stated that **"to communicate is to be alive"**, they were quickly brought down to earth by the practical implications of this statement.

The day's discussions centred around three main topics:

- What do users want?
- What does the communications industry need?
- What should governments be doing?

The participants agreed **users are becoming less "satisfied"** in the comforting sense that long-term solutions could be developed to meet their needs. They are placing increasing demands on suppliers, forcing them to work closely with their clients and to develop communications services that are tailored to their particular needs and not to those of some mythical mass market.

**Institutional users are very demanding**, listing among their "must haves" such things as better system interconnections, faster services at lower costs and better responsiveness and service delivery. **Residential users face increasing time management pressures** and are interested in environmentally benign technologies that help them manage their "99 lives" -- preferably without leaving the comfort of their own homes.

**Numerous barriers stand in the way of meeting these user demands.** Industry participants at the workshop highlighted a number of them, chiefly **the need for resellers to have equal access to networks and for updated regulatory practices** (both national and global) to encourage the introduction of new services. **Technologically, the principal barrier appears to be the lack of a Canadian high-speed network.** Politically, the major problem, according to several participants, is the **territoriality of suppliers and governments**, which are reluctant to form the partnerships that will be required to launch such high-profile, but expensive, projects as the high-speed electronic highway.

During the course of the day, **numerous suggestions were made on the steps that governments should take to meet user needs.** One speaker stated that



foremost requirement was **the articulation of a vision that started from a user-driven perspective**. More specific suggestions included:

- achievement of universal access to interconnected services through the **development of a high-speed, pan-Canadian electronic network** capable of delivering voice, data, image and video services to all Canadian homes and businesses;
- **rapid passage of Bill C-62**, the proposed new telecommunications legislation;
- **revisions to global telecom tariffing arrangements and copyright regimes**;
- **investments in people and communities**, such as the creation of "universities without walls" and educational and training strategies more suited to an information-based economy;
- **reshaping governments as model users of advanced communications technologies** by getting rid of "islands of technology" -- systems that are incompatible and place barriers in the way of service delivery to the public;
- **developing more effective partnerships among governments and with business, unions, community groups and educators**.

It was concluded that "the time for action is now". While partnerships are important, perhaps even more important is the **need for leadership**.

**It would appear that the Department of Communications is well-placed to assume this leadership role.** We have many of the policy tools needed to establish the "rules of the game". We have a good relationship with both existing and potential service providers and could broker many of the partnerships needed. We are committed not only to the economic, but also the social and cultural, well-being of Canadians and are philosophically well-suited to adopt a balanced strategy in their support.

**Perhaps the weakest link in any argument in favour of DOC taking a lead role is our commitment to users.** The participants at the workshop made it clear that it is not simply enough to provide the technology. We must also be prepared to invest in applications that meet user demand and to develop "active users" who are comfortable with advanced communications technologies and who will challenge suppliers to meet their ever-expanding needs.

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## **INTRODUCTION**

The word "communications" has become almost synonymous with the concept of "dramatic change". Advanced communications are altering the way we do business, the way we work, how we learn, even how we interact with our fellow human beings.

**Marc Zwelling**, the keynote speaker at the Strategic Planning Workshop on "The Changing Face of Communications", set the tone of the day when he stated that the Canadian economy has moved into a post-industrial phase where the manipulation of information, ideas and symbols has become more important than the production of goods. In this changing environment, he said, **"to communicate is to be alive"**, and the Mission of the Department of Communications has therefore become central to the future economic and social well-being of Canada.

Mr. Zwelling's words began the discussion on an encouraging note, but it soon became evident that they did not provide the basis for "resting on our laurels". In fact, **the central lesson of the day was that we would have to discard many of our most comfortable and comforting assumptions.**

Chief among these was the assumption that "if we build it, they will come". Technology push was rapidly giving way to demand pull, and this demand pull was drawing both communications suppliers and governments into territories seldom before explored.

Another cherished belief that we will have to re-examine is our faith in "made in Canada" solutions. We will not be able to meet many of the challenges that face us -- such as erosion of cultural sovereignty, global telecommunications services, tiny domestic markets -- unless we work in partnership with others outside our borders.

We also have to question whether we will ever again meet a "satisfied" customer. It is inherent in the nature of advanced communications services that innovations and improvements invariably lead to user demands for "more". Instead of viewing this as a problem, suppliers and governments should recast this dissatisfaction in a positive light and turn it into a motor for innovation.

The discussion throughout the day focused on the following main themes:

- 1) What do users want?
- 2) What does the communications industry need?
- 3) What should governments be doing?



The following pages provide a condensed overview of the discussion under each of these headings.

### **1. What do users want?**

Most users now look upon telecommunications as a **strategic resource**, rather than as a utility. Telecommunications have become an integral part of the service provided by businesses as basic as pizza chains and parcel delivery services and as sophisticated as the banking and airline industries. Users' expectations of this resource are as varied as the activities they engage in. However, a couple of major trends are becoming evident for **all** users.

Both **Robert Latham**, Group Vice-President of Major Accounts for Bell Canada and **Bill St. Arnaud**, a Project Officer with Vision 2000, emphasized the necessity of **working with users** to develop systems that meet their needs. Both emphasized that suppliers cannot afford to develop products that are rejected by the market. Therefore, service providers have to get down to the "front lines" when developing products to find out what is really needed by the client. Rather than by-passing the communications experts within organizations, Mr. Latham suggested that service providers would have to work harder to help them do their jobs, even if it meant getting involved in the organization's strategic planning.

Another major trend is **the increasing fragmentation of markets**. As one participant noted, "the ultimate customer market is one". Users are refusing to accept "one-size-fits-all" communications services. **Pierre Blillon**, Director of Technologies, Arts and Culture at the Canadian Workplace Automation Research Centre, told the participants that users of advanced communications systems want information that is tailored to their needs in the fastest possible time. They want technology that is easy to use and networks that are transparent and interconnected. If their service providers are unwilling or unable to adapt their systems to these needs, users feel no compunction about seeking out providers who will.

Beyond these major trends, the priorities of institutional and residential users differ in important ways.

#### **Institutional Users - We Want It All and We Want It Now**

**Wendy Cukler**, Director of the Canadian Business Telecommunications Alliance, gave a thumbnail sketch of the priorities of institutional users. These include:

- **better links to customers/clients**
- **better links to suppliers**

- **better links within increasingly decentralized organizations**
- **more high speed services at a lower cost**
- **lower long distance rates**
- **better billing information from carriers**
- **more responsiveness and flexibility from service providers**
- **better information on services available**
- **better education on communications management within organizations**

These priorities reflect the characteristics of what **Robert Gervais**, Vice-President of Operations with the Government Telecommunications Agency, referred to as the "new user".

This customer is **much more informed and proactive** than the traditional user of telecommunications services. New users are "search and learn"-motivated. They tend not to wait for information to come to them: instead, they go and seek it out. They are very intolerant of "down" time, since it affects their ability to gather and use information.

**They are never, as Marc Zwelling pointed out, satisfied.** They seldom know what they "want" in a technological sense, but when they realize that a product, such as the fax machine, meets their needs, they then proceed to make ever-increasing demands upon it.

Finally, **they have little sympathy with the technical or policy challenges faced by industries and governments** in responding to their needs. While we may indeed have to deal with spectrum crowding or interconnection problems, the general attitude of most institutional users is "I don't want to hear about it: just fix it".

#### **Residential Users - Staying Alive**

According to **Johanne Lemay** of DTI Telecom Inc., the average residential user of the coming decade will be older than today, have a higher family income, be more accepting and open to technology and more interested in personalized time management. Drawing heavily on the trends highlighted in the Popcorn Report, she presented the following picture of the priorities of residential users:

- **"cocooning" in the home**

- Indulging in escapist and fantasy adventures, but in a safe environment
- treating themselves to small indulgences
- demanding individual "ergonomics" - i.e. personalized, differentiated services
- "cashing out" of life in the fast lane (or for a growing number of workers "cashing out to the cocoon")
- refusing to be bound by traditional age limitations (what Popcorn calls "down-aging")
- "staying alive" by searching for a better, happier, longer life
- shopping defensively
- trying to manage time while living "99 lives"
- saving our society with the focus on ecologically benign technologies.

Advanced communications can provide a platform for services of value to residential consumers. For example, video on demand can satisfy the desire for both fantasy adventure and small indulgences. Telework, tele-shopping and tele-education are services that support the "cocooning" and "cashing out" urges, while at the same time helping harried users manage their "99 lives". For the most part, advanced communications technologies are environmentally benign, and the information they convey can help users to be better consumers.

The participants acknowledged that advanced communications services were generally well-suited to the residential market described above. However, they also frankly admitted that numerous barriers would have to be overcome before the potential of the institutional and residential markets could be fulfilled. The remaining sections of this report focus on those barriers and on the actions required to deal with them.

## **2. What does the Communications Industry Need? - Changes**

The industry participants at the workshop were very clear about the type of environment they would need to serve the users described above.

The single most important priority for telecommunications service providers in this user-driven environment is **the establishment of a unified regulatory regime**. This is particularly true in Canada, where several participants indicated their support for the rapid passage of Bill C-62, the new telecommunications legislation. However, it also has implications at the international level.

The **Honourable Céline Hervieux-Payette**, Vice-President of Regulatory and Legal Affairs at fONOROLA, outlined many of the sophisticated services, such as point-to-point videoconferencing and "Internet-type" electronic mail services for universities, that fONOROLA was considering. She indicated that **equal access to the telecom network was absolutely vital to resellers** like fONOROLA, which considered itself a client of Bell Canada rather than a competitor.

Several of the same points were also made by **Kelth Bernard**, Vice-President of International and Regulatory Affairs at Cable & Wireless North America Inc. He indicated that **many current regulatory practices were restricting the ability of resellers to serve their customers' needs by holding back the introduction of new services**. For example, calling card services that are "hubbed" through a central point use settlement payments from the hub country, rather than the point of origin of the call. This is a convenience for large, corporate users, but a threat to national carriers who view such by-pass activities as a threat to their revenue bases. In Mr. Bernard's opinion, most global telecom services in the future will be provided through simple re-sale -- an arrangement which will allow companies to cross the border to pick up domestic business in other countries. Assuming a fairly rapid transition to this state of affairs, **some new types of global tariffing arrangements will soon have to be developed**.

While changes to regulatory regimes were important, several participants also emphasized **the need for telecommunications service providers to become more outwardly focused**. Robert Gervais of GTA pointed out that there are numerous opportunities for Canadian telecommunications service providers in densely-populated foreign markets and suggested that carriers providing CT-2 services, for example, look beyond the United States to places such as China for future market opportunities. Besides looking at such markets strictly in export terms, communications companies should also become more aware of the value of "importing knowledge" about the needs of foreign users. A thorough understanding of such needs can provide significant competitive advantages to companies that take the time to explore them.

Both Robert Gervais and Bill St. Arnaud urged **less territoriality by suppliers and governments** when confronted with important user needs. The need for a Canadian high-speed network or "electronic highway" was raised several times, with both Mr. Gervais and Mr. St.Arnaud indicating that **government/private sector partnerships will be critical in developing such high profile but expensive projects**, given our small population. Despite the difficulties of achieving such partnerships, both believed that an electronic highway was essential for a number of reasons -- to stem the "brain drain" of Canada's best software developers, to serve user needs in Canada and to provide a test bed for advanced services that can later be marketed abroad.



### **3. What Should Governments be Doing? - The Vision Thing**

Throughout the day, suggestions were made about the steps that governments should take to ensure that users' demands are met.

First and foremost, according to **Don Tapscott**, the luncheon speaker and Chairman of the Advisory Committee on a Telecommunications Strategy for Ontario, was the **articulation of a vision** which outlined the goals and policy directions the government wished to achieve through its telecommunications strategy. In Ontario, the vision, simply stated is as follows:

**Enabled by telecommunications, Ontario, and in turn Canada, will be the best place in the world to live, work, learn and do business.**

The goals which would contribute to the fulfilment of the vision are:

1. A telecommunications infrastructure which enables growth
2. A dynamic, growing telecommunications sector
3. Enhanced quality of life through telecommunications
4. Strategic application of telecommunications by the Ontario government

Mr. Tapscott also urged that any attempt to develop a similar vision at the federal level **start from a user-driven perspective**. A smaller, more open world is being created by the "demand pull" exerted by users, and he noted that the Ontario Advisory Committee on a Telecommunications Strategy for the Province of Ontario would have "blown itself apart" if it had focused its deliberations on supply-side issues instead of demand-side ones.

Within the framework developed by Ontario, many different policy directions could be taken. Several of these options were discussed at some length during the course of the day, with particular emphasis on the federal situation and the possible role of the Department of Communications in pursuing them.

### **Networks and Services**

One of the characteristics of an advanced, information-based economy is **networked organizations**. Because of the shorter time-frames made possible by communications technologies, organizations cannot afford to wait while information moves up and down hierarchies. They are, instead, relying increasingly on **networked technology** to keep information flowing in all directions.

Achieving the "universal access to interconnected services" that Pierre Billon referred to in his presentation is the central challenge to governments. Don Tapscott emphasized the need to assist in the **development of a "network of networks" which would promote interoperability and common standards**. Even though "supply issues" were not the main focus of the day's discussion, there was an underlying sense throughout the proceedings that **a strong technological base was required before user needs could be properly addressed**.

While most participants agreed that **universal interconnection was a desirable goal**, Paul Racine posed a number of pertinent policy questions that would need to be answered before a pan-Canadian electronic network capable of delivering a variety of voice, data, image and video services to all Canadian homes and businesses could be developed:

- Who will build the network?
- Who will run it?
- Who will pay for it?
- Will there be competition in services on the network?
- What complementary spectrum and standards policies will have to be developed?

As for the services delivered on this network, Johanne Lemay posed her own set of questions:

- Who are the most critical players in realizing the service potential of the network? Users? Providers? Governments?
- What kind of industry structure can best provide the services required?

- The status quo (where some services are provided by telecommunications service providers and some by cable service providers, with no competition)?
- Competition and cooperation between the telecommunications and cable industries?
- The development of new types of service providers that are neither telecom nor cable-based?

### **A Clarified Regulatory Environment**

There was almost universal agreement among the participants that swift action would be needed on the regulatory front to answer the type of questions posed by Johanne Lemay above.

While the proposed new Telecommunications Act addresses only part of the service provider question, **It was generally agreed that rapid passage of Bill C-62 was a necessary first step.** As Paul Racine pointed out, even the railroads are no longer governed by the Railway Act. Bill C-62 was needed to unify the Canadian market and to provide the 21st century tools needed for a 21st century market. Speaking from a user perspective, Wendy Cukier supported this point of view, indicating that the CBTA wished to see a consistent national regulatory framework that promoted the faster introduction of new services at a lower cost.

Beyond the passage of Bill C-62, however, the regulatory landscape became considerably hazier. As both Marc Zwelling and Keith Bernard pointed out, **the increasingly global nature of communications services calls into question whether regulatory structures at the national level can be completely effective in bringing about a transparent user environment.** Will governments from around the world have to develop new global tariffing arrangements?

Even current global regimes, such as the copyright conventions, may have to be overhauled. According to Pierre Billon, as user access to information from around the world becomes cheaper and easier, a new attitude toward intellectual property may take hold. **How can universal access for users be balanced against fair compensation for creators in a global, electronic environment?** This question could only be barely addressed, let alone answered.

### **Investments In People and Communities**

Beyond the investments required to stimulate economic growth through advanced communications, it became clear that a number of social investments would also have to be made to ensure that the users are as sophisticated as the technology.

Both Don Tapscott and Robert Gervais repeatedly emphasized that **the successful transition to an information-based economy requires "learner-based competency" or, as Don Tapscott put it, "active users"**. In his address, Mr. Tapscott indicated that the training and education recommendations of the Advisory Committee on a Telecommunications Strategy for Ontario were an integral part of the report, not simply add-ons or platitudes. **The central aim of any federal strategy, he suggested, should be to have a wide range of information services available to Canadians, who know how to use them.**

Mr. Tapscott made a number of suggestions with regard to "re-tooling people", taken largely from the report of the Ontario Advisory Committee. These included:

- the development of an educational and training strategy which would address not only the needs of informatics professionals, but also those of research, marketing and management staff in organizations;
- the creation of "universities without walls", using telecommunications technologies to deliver training directly to the workplace;
- the support of community information exchange networks to help strengthen local social, economic and cultural development.

**It was emphasized repeatedly that the success of these initiatives would hinge upon "co-determination and cooperation", as Mr. Tapscott phrased it, involving partnerships between governments, business, unions, community groups and educators.**

### **Reshaping Government as a Model User**

Another productive area of possible intervention, according to Don Tapscott, lies in **making governments model users of telecommunications technologies.**

He suggested that **the first priority was to get rid of "islands of technology" -- systems that are incompatible and place barriers in the way of service delivery.** This could partially be accomplished through the power of the purse, if governments insisted that suppliers adhere to open-systems standards before technologies or information services were purchased. By encouraging partnerships with private sector

in the provision of efficient telecom-based delivery of government services, the government can potentially play a key role in helping the Canadian communications industry develop a strong domestic base. By encouraging user input to the design of "single window" information centres, governments can ensure that electronic services are delivered in the most effective way.

### **Ensuring that Technology Serves Users**

**The problem of conflicting agendas among government agencies was also briefly mentioned.** In Ontario, it was suggested that government structures be rationalized to ensure clearer responsibility for leadership in delivering the province's telecommunications strategy.

While the day's discussion did not explicitly focus on the federal situation, the repeated references to the need for partnerships suggested **a growing user frustration with unproductive "turf wars"**. As Paul Racine stated in his opening remarks, the federal government made an enlightened decision in 1980 when it decided to combine the responsibility for telecommunications, broadcasting and the cultural industries under one roof. **Convergence of these industries is expected to continue at an accelerated pace during the 1990s, and it will become even more important in the future, according to Mr. Racine, that the instruments of policy in these areas remain together.**

### **CONCLUSIONS - DOUBLE JEOPARDY**

As one participant said, it is time for DOC to identify itself as "in the game". The question that was explored throughout the day was essentially: what is the game?

**The game clearly is being played for high stakes and has the potential to put Canada in a "lose-lose" situation.** This would be the result if, as Don Tapscott warned, we fail to make the necessary investments in technology and people and sink to the level of a low-wage, low-tech economy.

**The game can potentially result in a "win-win" outcome, if Canadians make up their minds to use advanced communications technologies to their maximum advantage.**

However, an intermediate "win-lose" outcome is also a possibility if we continue to rely upon telecommunications manufacturers and service providers to furnish the technology, but do not apply it in ways that provide economic, social and cultural benefits for Canadians. This result will occur if we fail to make the critical linkages between supply and demand, between the provider and the user. In the absence of such linkages, our national telecommunications and informatics "champions" will simply go south of the border or off-shore to take advantage of markets that are more open to innovation.

The key clearly lies with the users and, since we are discussing a Canadian context, with Canadian users.

**Partnerships will be essential, but perhaps even more important is the need for leadership.** All the Canadian players seem to be awaiting the signal from a leader to begin the game, and **there are several good reasons for DOC to consider taking this role.**

First, as Paul Racine pointed out, we have many of the policy tools required to establish the "rules of the game". Second, we have a good relationship with both existing and potential service providers, and could broker many of the partnerships needed to achieve a "win-win" outcome. Third, we are committed not only to the economic, but also the social and cultural, well-being of Canadians and are philosophically well-suited to adopt a balanced strategy in their support.

**The weakest link in our argument is our commitment to users.** Historically, we have viewed our role as one of "getting the pieces on the board", not as one of designing the board itself or of coaching the players on how to play the game.



In the high-stakes global game of advanced communications, the players are already in the field and the action has already begun. There is still time, while the opening moves are being made, to influence the outcome of the play. But we cannot afford to wait too long. The time to act is now.

**Strategic Planning Workshop**  
**November 24, 1992**  
**Palais des Congrès (Hull)**

**List of Participants**

Laurel Berdnikoff	ADMCP
John Quigley	ADMPM
Marie-France Potvin	ADMQ
Wilmo Ingley	ADMRS
John Belrose	CRC
Dr. R. Breithaupt	CRC
Dewin Johnson	CRC
Dorothy Phillips	CRC/DGBT
Joe Schlesak	CRC
Lewis Scott	CRC
Eric Tsang	CRC
John Chang	DASM
Don Paskavich	DASM
H. Khomusi	DCE
Janet Witt	DFR
George Zurakowski	DGBR
Arthur Cordell	DGCP/DPP
Dan Byron	DGCP
Hélène McDonald	DGCP/DTP
Bev Mahony	DGCP
Prabir Neogi	DGCP
David Warnes	DGCP
Michel Gaudreau	DGEP
Havelin Anund	DGHP
Siobhan Scott	DGHR
Leonard Eichel	DGIR
Louise Terrillon-Mackay	DGIR
Bruce Drake	DGIR
Nicholas Pépin	DGIR
Ninon Charlebois	DGIS
Jim Cutting	DGIS
Gérard Desroches	DGIS
Michael Holmes	DGIS
Hélène Marceau	DGIS
Linda Quirouette	DGIS

Ghislaine Roy	DGIS
Pierre Leduc	DGNM
Robert Régimbald	DGQ
Bruce Jamieson	DGRO
Simon Landry	DGRO
Jim Mackenzie	DGRO
Maurice Drew	DGRR
Phil Baillargeon	DGSP
Attilio Barcados	DGSP
Nathalie Chamberland	DGSP
Ned Ellis	DGSP
Claude Hébert	DGSP
Sharon Jeannotte	DGSP
Kevin Lamarque	DGSP
Geneviève Ledoux	DGSP
Raymond Lepage	DGSP
Brenda Patterson	DGSP
Ian Pomroy	DGSP
Ghislain Savoie	DGSP
Marc Séguin	DGSP
David Waung	DGSP
Susan Barker	DGTP
Alan Hamilton	DGTP
Suzanne Latrémouille	DGTP
Doug MacEwen	DGTP
Yvette LeGal	DHPR
Jean Vachon	DHPR
Gaétan Boivin	DIAB
Hélène Carrier	DIRS
Isabelle Seckler	DLRR
Christine Evans	DLS
Sophie Hémon	DLS
Robert Baser	DMS
Roger Wainwright	DMS
John Buckowitz	DMSAT/CRC
David Halayko	DMSAT/CRC
Patrick Carrey	DOS
Gaétane Laplante	DPE
Jocelyne Thiffault	DPO
Audrey Davis	DPP
Luc Fournier	DPP
Kim MacKinnon	DPP

Bill Graham	DPP
Stephanie Perrin	DPT
Daniel Giasson	DRGP
Manon Pelletier	DRGP
Ben Ho	DSI
Joanne Kennedy	DTP
Diane Desormaux	ECS
Mitch St. Jacques	EDO-ROD
Lorraine Wilson	EDO
Bill Aiken	GTA
Brian Boyden	GTA
Morag Cavers	GTA
John Keyley	GTA
Chantal Mimeault	GTA
J.P. Mollicone	GTA
Ingrid Barclay	GTA
Maria Derosa	MDR Consulting
Dick Proulx	Bell Canada
Elaine Walker	Bell Canada
Louise Guay (Fax info)	National Archives
Keith E. Bernard	Speaker
Pierre Billon	Speaker
Wendy Cukier	Speaker
Robert Gervais	Speaker
L'Hon. Céline Hervieux-Payette	Speaker
Robert Latham	Speaker
Johanne Lemay	Speaker
Paul Racine	Speaker
Bill St. Arnaud	Speaker
Don Tapscott	Speaker
Marc Zwelling	Speaker

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## **STRATEGIC PLANNING WORKSHOP**

### **The Changing Face of Communications: New Demands and Expectations of a Strategic Resource**

**November 24, 1992**

**Salle des Banquets  
Palais des Congrès, Hull, Quebec**

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### **OBJECTIVES OF THE WORKSHOP**

The word communications has become almost synonymous with the concept of "dramatic change". Rapid technological advances, industrial repositioning, regulatory restructuring - together, these forces of change are dramatically altering the way we do business, the way we work, how we learn, even how we care for each other.

Against this backdrop of rapid change, however, one thing is clear: communications products and services are increasingly viewed as a **powerful resource**, whether to further business opportunities or foster social well-being. As a result, communications users are increasingly becoming the focus of public and private decision-making. But who are the communications users of tomorrow, and how are they different? What will be their communications expectations and demands, and how can these best be met? And are communications users - both existing and potential - able to harness and exploit the full range of benefits offered by this resource?

The Workshop will provide the Department a unique opportunity to hear "outside" views on where, taken together, the forces of change in communications are leading us, and the role which growing and changing communications expectations and needs are playing in product and service innovation.

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## **STRATEGIC PLANNING WORKSHOP**

**The Changing Face of Communications: New Demands and  
Expectations of a Strategic Resource**

**November 24, 1992**

**Salle des Banquets  
Palais des Congrès, Hull, Quebec**

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**CHAIRPERSON: Ned Ellis, DSF**

**8:30 a.m.                      Coffee**

**9:05 a.m.                      OPENING REMARKS - Chairperson - Paul Racine, Assistant  
Deputy Minister, Communications Policy**

**9:15 a.m.                      KEYNOTE ADDRESS - The Changing Face of Communications:  
Is there a Fortune-Teller in the House?**

**Marc Zwelling, Publisher, "John Kettle's FutureLetter"**

**and**

**OBSERVATIONS AND COMMENTS - Pierre Billon, Director,  
Technologies, Arts and Culture, Canadian Workplace Automation  
Research Centre**

**10:15 a.m.                      Coffee Break**

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10:45 a.m.    **PANEL DISCUSSION - Taking Aim at a Moving Target: The user in an environment of rapid change in communications**

**Panellists:**            Keith E. Bernard, Vice President, International & Regulatory Affairs, Cable & Wireless North America Inc.

Bill St. Arnaud, Project Officer, Vision 2000

Robert Gervais, Vice-President, Operations, Government Telecommunications Agency

Communications in the last 20 years has been characterized by radical change. Revolutionary technological advances have allowed a myriad of new and innovative products and services to be offered. In addition, countries world-wide are placing unprecedented emphasis on competition, privatization and deregulation as a means to drive service and product innovation.

The technological and regulatory revolutions gripping the sector have also spurred - and been a reaction to - dramatic change on another front. The use of and reliance on communications has grown to such an extent that they are no longer viewed as just a cost item or utility, but as a strategic resource vital to economic survival and social well-being. Indeed, within many organizations, communications are fundamentally altering "the way things are done", even reshaping the products and services normally offered.

The panel will focus on these different sets of changes and consider where, taken together, they are taking the communications user of tomorrow.

12:15 p.m.    **Lunch**

**LUNCHEON SPEAKER - A National Communications Strategy -**  
Don Tapscott, Vice President, Technology, DMR Group Inc.  
(Chairman of the Advisory Committee on a Telecommunications Strategy for the Province of Ontario, and co-author of Paradigm Shift: The New Promise of Information Technology)

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2:00 p.m.     **PANEL DISCUSSION - Developing and Meeting Communications Needs and Expectations**

**Panellists:**             Wendy Cukier, Director, Canadian Business Telecommunications Alliance

The Hon. Céline Hervieux-Payette, P.C., Vice-President, Regulatory and Legal Affairs, fONOROLA

Johanne Lemay, DTI Telecom, Inc.

Robert Latham, Group Vice-President, Major Accounts, Bell Canada

In a "volatile" environment of rapid technological change, growing liberalization and diversity in products, one thing is clear: end-users - both real and potential - are taking centre stage in communications planning. In some cases, communications users have become extremely sophisticated and knowledgeable and thus demanding drivers of leading-edge products. Satisfying their requirements in a timely and effective manner has very much become a test of success for communications suppliers, many of whom are redefining their role from "selling products" to "creating value" for their customers by offering communications-based solutions.

Our definition or profile of "communications user" is also changing, encompassing small businesses, groups and organizations and the public at large. This user segment often lacks the expertise and ability to take full advantage of potential communications opportunities and rarely ask for more than is already offered. They represent a significant but "untapped" source to drive service development in imaginative ways.

Who are - and will be - the new communications users, and how are they different? What demands will they make on communications suppliers and policy-makers, and what has to be done to ensure user "value" is recognized and met? Is market demand the only gauge of user value and expectations?

3:30             **CLOSING REMARKS - Chairperson, Ned Ellis, Director, Corporate Priorities**

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