



Communications  
Canada

*strategic*

*policy*

*planning*

■ ■ ■ ■

*planification*

*stratégique*

*des politiques*

## Globalization of Communications and Culture:

Can Canada Keep Up? 8

S  
T  
R  
A  
T  
E  
G  
Y  
  
A  
N  
D  
  
P  
L  
A  
N  
S

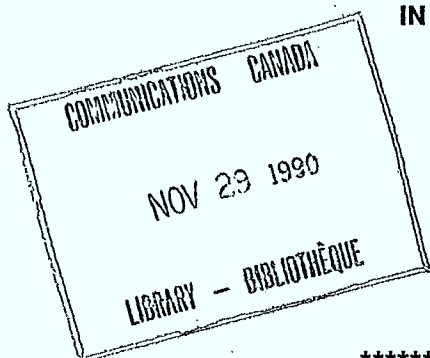
QUEEN  
JX  
1395  
G563  
1990

STRATÉGIE ET PLANIFICATION

1. /  
**Globalization of Communications and Culture:**

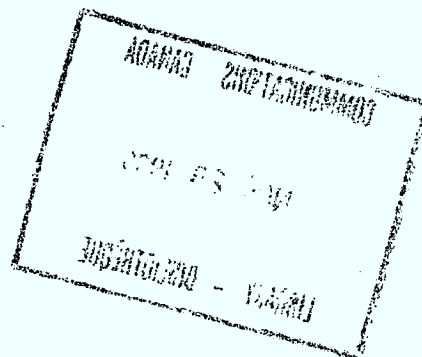
**Can Canada Keep Up? 8**

**REPORT ON THE WORKSHOP  
HELD ON 29 JUNE, 1990  
IN THE NATIONAL GALLERY  
OTTAWA ONTARIO**



\*\*\*\*\*  
CE RAPPORT EST AUSSI DISPONIBLE  
EN FRANÇAIS  
\*\*\*\*\*

*Strategic Policy Planning  
Communications Canada  
July 25, 1990*



DD 10117720  
DL 10188762

JX  
1395  
G563e  
1990  
p. 2

### Acknowledgements

The Globalization Workshop was a **DGIR** and **DGSP** collaborative effort. The support and guidance of **Mr. Gabriel I. Warren**, Director General International Relations, in the planning and hosting of this event are very much appreciated.

Also appreciated are the efforts of **Vladimir Skok, Sharon Jeannotte, Michael Tiger, Richard Hall, Jennifer Jang, Suzanne Loranger** and **Patricia Kim** of **DGIR** and **DGSP** who together planned and organized the Workshop Agenda and prepared this final report.

Finally, this Workshop would not have been possible without the participation of **all those who attended** the event and shared their ideas and views on this important topic.

**David Waung**  
**Director**  
**Strategic Policy Planning**

## Table of Contents

	Page
Acknowledgements .....	ii
Executive Summary .....	iv
Introduction .....	1
•Globalization and Internationalism .....	1
•Co-existence of Globalism and Nationalism .....	3
•National Competitiveness in a Global Economy .....	4
•An Increasingly Complex Policy Environment .....	6
•Globalization Outpacing Policies. ....	9
•A Closing Window of Opportunity .....	10
 -Appendix I: Registered Participants for Globalization Workshop .....	 13
-Appendix II: Workshop Agenda .....	19



### **Executive Summary**

The DOC workshop of June 29, 1990, entitled **Globalization of Communications and Culture: Can Canada Keep Up?**, considered the implications for Canada and the DOC of currently developing closer cross-border linkages in communications and culture.

### **Globalization and Internationalization**

It was noted at the workshop that the growing interdependence or amalgamation of national economies does not necessarily have to result in a loss of national autonomy. It was suggested that rather than being dominated by the products and culture of a few countries, international relations can instead be constituted by the contributions and exchanges made between distinct, individual nations on the basis of equality. Within this context, nations do not have to be of the same mould to participate in the global society and national competitive advantage is based on diversity rather than uniformity.

### **Globalization and Nationalism**

The growing importance of the international dimension in today's world is paralleled by a resurgence of nationalism. While it is difficult to predict the future course of nationalism, its continuing presence will have to be addressed in our policy responses.

### **National Competitiveness in a Global Economy**

Workshop discussion stated on several occasions that Canada must strive to be competitive in both communications and culture so that these sectors may survive in a globalized world. The two domains need to seek their success by different approaches. For culture, the challenge is to create international quality products which will complement our most critical objective of obtaining a greater part of our own domestic market. The goal for telecommunications is to maintain Canada's competitive position in this sector and fully exploit possibilities in the international market.

### **An Increasingly Complex Policy Environment**

Achievement of these objectives will be sought within a policy environment which is becoming more complex. A number of factors external to the Department, such as fiscal, monetary, industry and technology policies, possess a growing ability to affect DOC's mandate and operations. The interrelated nature of these factors requires the DOC to be more aware of its external policy environment in its domestic policy formulation, in order to effectively use the instruments at its disposal.

### **Globalization Outpacing Policies**

DOC policy instruments will need re-examination, as will certain communications and culture policies that the workshop suggested are being outpaced by the process of globalization. Long-standing policies and programs developed in an era when domestic situations could be viewed independently of external events may no longer be relevant. The continued relevance of certain Canadian ownership policies, for example, warrant review.

### **A Closing Window of Opportunity**

Workshop discussion suggested that the Department can be proud of its past efforts but it is nevertheless at risk of being overtaken by external events. A quickly emerging globalized world environment, with growing convergence due to the greater use of IT to distribute cultural products, allows the DOC only a limited period of time during which current policies and programmes can still be effective in enhancing the competitiveness of Canadian telecommunications and culture. It was suggested that the Department and Government had only 10 years during which to implement current policy initiatives and to develop new strategies to cope with a rapidly changing global environment.

**WORKSHOP REPORT:**  
**GLOBALIZATION OF COMMUNICATIONS AND**  
**CULTURE: CAN CANADA KEEP UP?**

**Introduction**

The DOC workshop entitled Globalization of Communications and Culture: Can Canada Keep Up? was held on June 29, 1990 to consider the closer cross-border linkages which are forming in telecommunications and culture as well as some of their resulting social, cultural, political and economic consequences. Discussion particularly focused on the impact the process of "globalization" may have on Canadian telecommunications and cultural policies.

The day-long workshop was chaired by Gabriel I. Warren, Director General of the DOC's International Relations Branch. The exercise included a morning panel of experts from outside the DOC while the afternoon session was composed of departmental staff. Over 150 department employees attended the meeting. (A list of participants appears in the Report's appendix)

**Globalization and Internationalism**

The workshop demonstrated that much of the process usually labelled "globalization" is subject to substantive debate and discussion. This includes definition of the term itself. It can be noted that a difference in meaning between "globalization" and "internationalization" was raised at the workshop, a point which can usefully be expanded in this report.

"Globalization" generally refers to the growing amalgamation of national economies -- including consumers, suppliers, competitors and markets. Recent technological and economic developments underlie much of the process of "globalization." In the entertainment industries it is already possible because of technological advances, for example, to distribute CNN programming to 90 countries and the same Saatchi and Saatchi television advertisements worldwide. Technology permits audiences around the world to be treated as part of the same single global audience.



"Globalization" of communications is also occurring with the creation of world-wide information and telecommunication networks. These serve to consolidate users into identifiable groups because the same services are now available on a global basis. Examples abound. Inter-continental personal banking is possible through the Cirrus system. EDI introduces use of standardized procedures which can arrange "just in time" delivery regardless of whether suppliers are just down the block or on the other side of the world. The same data bases in California, meanwhile, are available to individuals and organizations world-wide.

Concurrent with the greater reach of telecommunications networks, "globalization" can also be understood to represent growing concentration of industry ownership. Robert Maxwell's 1984 prediction that within a decade the world's media would be controlled by a handful of companies appears to be coming true. Growing concentration is also occurring in the telecommunications field. It is widely predicted, for instance, that by the Year 2000 the world market for telecommunications equipment will be dominated by only six major manufacturers. Thus although the globalization of telecommunication networks and industries is expanding markets and contributing to a growing media flow between nations, **concern was raised at the workshop that these developments are leading to the imposition of many forms of standardization. Homogeneity of the world's culture is one possible result.**

"Internationalization," meanwhile, in contrast to "globalization," can be understood to refer more to a notion of a developing "global village". Rather than being dominated by the culture and products of a few countries, international relations can instead be constituted by the contributions and exchanges made between distinct, individual nations on the basis of equality.

In terms of telecommunications and culture, "Internationalization" can signify the exchange of culture and technologies which nevertheless serve to reflect national or regional priorities.

In this vein, **nations do not need to be of the same mould to participate in a global society; national competitive advantage is based on diversity, rather than uniformity.** The international success of "Anne of Green Gables," for example, is due to its distinctively Canadian character rather than its similarity to standardized global entertainment programming. Likewise, the Canadian traditional strength in telecommunications was derived from innovative use of technological advances to meet unique Canadian challenges of geographical distance and sparse population.

Thus, if "globalization" can stand for standardization, conformity and homogeneity, "internationalization" can represent the diversity of national views and realities which are found in the world. There was concern raised at the workshop that without innovative government policies, the former force may soon overcome the latter, with undesirable social and cultural consequences for countries like Canada.

### Co-existence of Globalism and Nationalism

If globalism and internationalism stand in opposition to one another, there is evidence that globalism and nationalism are two processes which are developing in parallel fashion. It is difficult to definitely say how the two interact. Yet there is little doubt that while the world is becoming smaller through the process of globalization, it is also becoming more differentiated because of the reassertion of regional identities.

It was claimed during the workshop that the world's media conglomerates have their own political agenda, one of privatization and deregulation. This is one that they can seek to implement by exerting homogenizing power over the ideas, culture and commerce of nations. There was concern that in "the coming battle among media firms for global markets" there could be little or no room for the social and cultural goals of nations and regions.

While the topic of globalization of the telecommunications and cultural industries and the possible concomitant standardization of telecommunications services and cultural content is a vast and difficult one to treat, it is nevertheless possible to simultaneously identify a growing nationalism among the nations and regional groups in the world. **It seems paradoxical that the very same media that threaten the standardization of culture and regional tastes have also stimulated demands for national and regional autonomy.** Nationalism played a major role in the Eastern European countries' recent moves towards democracy and the diminishing of Soviet influence in that region. Some of these nations moreover are now in turn faced with internal demands for greater liberty by their own regions.

A renewed sense of "being European" has led to the old continent adopting a number of measures and programs within the framework of "Europe 1992". While many of the steps taken are obviously intended to boost European competitiveness, they also seem to arise from Europeans recognizing themselves to be a people collectively apart from others. This recent European "pan-nationalism" has produced a

vigourously promoted common position on HDTV standards, "Green Papers" on the mass media and broadcasting, as well as telecommunications and information technology. These are all efforts with the initial objective of making Europe strong and enhancing integration between the continent's regions.

Nationalism, whether or not it can be considered as a backlash to the global expansion of certain predominate ideas, companies or markets, is a sentiment that likely has not yet run its course and may very well gather in force. Its resurgence may impede some of the present imposing momentum of the process of globalization.

### National Competitiveness in a Global Economy

In respect to the future national prosperity of Canada, workshop participants expressed time and again the need to be competitive. This requirement was esteemed equally necessary on the cultural side of the Department's mandate as on the telecommunications one. **The two areas, however, need to seek their success in differing ways -- communications looking to the international market, and culture, to the domestic one as a springboard into the international market.**

The nature of competition between firms, and between countries, is changing. Companies in the manufacturing and technology sectors of the economy increasingly need to secure success in the global market in order to ensure their economic survival. National markets have become too small, for instance, to generate the revenue required to support expenses such as new R & D. Access and sales in foreign markets are needed to ensure the economic competitiveness of firms.

The impact on business activity of the international dimension is reducing the sanctity of the home market for domestic firms. In a related manner, accords such as the FTA, and those arising from the current Uruguay Round of the GATT, are in the process of removing trade barriers. As a result, the economic and social well-being of countries depends less on the continued existence of protective tariffs, as on their ability to compete on the basis of national competitive advantage. In summary, the competitiveness of domestic firms on a global basis, and of nations as a site for business and industrial activity, is of growing importance in a globalizing world economy.

There was consensus at the workshop that the importance of the Canadian telecommunications sector to remain at the international forefront could not be stressed strongly enough. Telecommunications is of vital importance both because of its value as an economic sector in its own right, but also because of the crucial "enabling role" it performs for the rest of the economy. There was general agreement that Canada continues to have one of the best operating telecommunications systems in the world. It was asked, however, why does the myth persist (at least in Canada) that we are at the leading edge of information technology and high-technology when we have lost much of our once-held lead and are now in danger of being overtaken by others around the globe. The European Community may now be playing "catch up," but given their strategic alliances between government and the private sector, they can leave countries like Canada behind in the absence of a true national strategy.

**It was felt at the workshop that one of the most serious threats to the future competitiveness of the Canadian telecommunications industry is the fragmentary nature of the domestic market.** Maintaining Canadian leadership in telecommunications services and products would undoubtedly be made easier if Canadian companies possessed a strong, unified market as a domestic base. A unified approach to telecommunications services is also needed because current discrepancies across the country in terms of interconnection, services and prices threaten to place a whole range of Canadian businesses at a competitive disadvantage. The recent Supreme Court decision on telecommunication jurisdiction has presented the opportunity to create the single home market which is vital to the future viability of the Canadian communications industry. This industry is competitive in the global market -- indeed, it is our only internationally viable high-tech sector. It should be helped and encouraged to continue to find international markets. Thus the importance of enacting current proposed national telecommunications legislation cannot be overstated; the industry is fundamental to the creation of a competitive economy for the 1990s and beyond.

The workshop also raised the industrial policy point of whether Canada should consciously seek to aid the development of "more Northern Telecoms" or small software firms instead. The question the government may need to consider is whether Canada's interests are best served by "home-grown" conglomerates which compete in the global market, or by smaller niche players who perhaps will maintain a greater part of their operations within Canada. More and more, Canadian companies will have to form strategic alliances with compatible foreign firms. While large Canadian multinationals (like Northern Telecom) can probably take care of themselves, small to medium-sized Canadian enterprises will likely require

government assistance.

The workshop participants also discussed the competitiveness of Canadian cultural industries, particularly in a new era when the sector is becoming more internationalized. **Commentators suggested that in order to compete in the changing cultural/entertainment market, Canada must first get its domestic scene "in order".** Although great strides have been made, Canadian cultural products still need to be made more competitive in the domestic market. Given the openness of the Canadian market to foreign cultural products, Canadian cultural producers will be forced to attain international standards in order to compete at home. It was predicted that the increasing ability of Canadians to compete on this basis, armed with international-quality products, will in turn naturally lead to a greater presence in the global market.

The question was also raised of whether in the cultural domain, as with telecommunications, the government and DOC should encourage the development of internationally active Canadian media conglomerates. Thomson International, one of the world's largest media conglomerates, is Canadian-owned, while Télémédia and Maclean-Hunter possess large foreign holdings and investments. Would Canada's cultural industries fare better if they were regrouped within larger entities?

In summary, the workshop demonstrated that there are both strengths and weaknesses in the international competitiveness of the sectors which make up the Department's portfolio. In a globalized era, both telecommunications and culture need to be competitive but, at least for the short term, the two sectors will require different approaches. The challenge for the cultural mandate is to encourage the creation of international quality products and to obtain a greater part of the domestic market as a prerequisite for entry into the international market. For the telecommunications sector, already supplied with world-class products, the task is to build upon current strengths and to fully exploit all global market possibilities, including the frequent establishment of strategic alliances with foreign firms.

### **An Increasingly Complex Policy Environment**

Workshop discussion provided evidence that Communications Canada operates within an increasingly complex policy environment. **Policies and processes in a number of disparate areas external to the Department are becoming more interrelated and now have a greater impact on DOC's mandate and**



**work.** The interrelated policy areas identified at the workshop include: investment and trade, foreign policies, multilateral obligations, and, lastly, monetary and fiscal policy. The jurisdiction for these policy areas also overlap various government departments and agencies.

Investment is a particularly important element in the globalization process. Firms are seeking to establish cross-border operations and to expand both vertically and horizontally (seeking efficiencies of scope and scale). The trend to form joint ventures and strategic alliances has also recently become more pronounced; many companies in the telecommunications and cultural industries are attempting to position themselves advantageously for developing global markets by either acquiring minority or controlling interest in firms already established in foreign markets, or by entering into co-operative production and marketing agreements with those firms. Co-operative arrangements between companies with a view to establishing operations in a third country are also becoming more common. It is because of the contemporary globe-spanning nature of investment that the topic is likely to come under greater GATT scrutiny during its current round. The DOC has an interest in these GATT activities because of its established ownership policies in both the telecommunications and culture sectors.

Patterns in trade meanwhile increasingly reflect where investment considerations have placed factories and producers in relation to their consumers. As such, changes in the nature of trade in goods is less a causal factor which explains the process of globalization, than a result. Trade issues will nevertheless remain extremely important to the government during the emergence of a single world economy because of the need to keep foreign markets open to Canadian producers. This is evident in regard to the question of whether Canadian telecommunication service and equipment manufacturers, along with cultural producers, will continue to have ready access to Europe after 1992. This was a matter of concern to some workshop participants, who view Europe as a natural export market for Canada.

The consequences that overlapping jurisdictions can have on telecommunications and cultural issues which come under DOC's mandate was also raised at the workshop. Communication matters increasingly invoke the intervention, or require the co-operation, of actors other than the DOC. These can include diverse federal agencies, other levels of government, and the private sector. While it was stated many times during the workshop that the Department needs to provide its constituents with a more stable and supportive policy environment, jurisdictional overlap can render this difficult. The example was given of the divided responsibilities which exist between DOC and ISTC for information technology. A clarification of respective

departmental functions would likely enhance co-ordination and co-operation within government, and boost vitally needed input from industry. As a consequence, attainment of both wider government and DOC policies and objectives for the sector would be more certain.

Canada's foreign relations also have a direct link with the well-being of the country's telecommunications and cultural sectors. Telecommunications, it was stated at the workshop, is gravely affected by the lack of a strategic alliance between Canadian foreign policy and national development objectives. Without these linkages, the impact of federal initiatives such as the FTA and "Going Global" is diminished. National R & D efforts, meanwhile, could make more intensive use of Canada's well-developed international connections in order to access the latest technological developments and advances in knowledge. The Department's cultural policies might benefit as well from a tighter fit with our foreign efforts, leading, for example, to the better integration of cultural initiatives (including the marketing of cultural products) with particular countries and regions.

Multilateral fora and relations, the workshop noted, are also changing. They are growing in importance and complexity and will likely have a greater impact on the DOC's activities in the near future. Agencies such as the ITU, which have provided Canada with a useful forum in the past, are now coming under new pressures. The increasing importance of the international dimension in communications and its intrusion into the domestic domain is evident by the fact that the current Uruguay Round of the GATT is discussing telecommunications matters such as prices and interconnection, as well as sharing and resale of leased circuits -- these are all matters which were exclusively domestic issues only 5 years ago. They are also important policy areas for the DOC.

The workshop was also told that the Department must be more aware of the impact that macroeconomic factors such as monetary and fiscal policy, along with the exchange rate, can have on its policies and programs. A substantial shift in the fiscal environment can undo years of the Department's work and progressive policy implementation. The introduction of the GST directly affects the DOC and its programs but is a matter on which the Department can bring little influence to bear. The federal deficit, meanwhile, reduces resources available to the DOC to support its policies and programs.

In summary, a more globalized world environment can have several ramifications for the DOC. The factors described individually above, for example, are often interlinked. Thus GATT deliberations on investment

may ultimately have an impact on world money flows and, consequently, Canadian telecommunications and cultural industries. Because of the importance of policy areas such as trade, investment and tax incentives, the DOC will henceforth need to be more cognizant of its external policy environment.

### Globalization Outpacing Policies

While consensus appeared to exist at the workshop that the objectives the Department has set for the telecommunications and cultural sectors remain valid, less unanimity existed on some of the specific policy decisions that have been taken to attain these objectives. DOC policies on ownership, the DOC-ISTC relationship, and flexibility in implementation of cultural policies were among the issues addressed, along with the more philosophical question of whether the Department has been "confusing means for ends". In the time available to discuss these points, concern was expressed that some current DOC policies are no longer relevant to a changing environment. These policies and positions need to be re-examined in regard to their contribution to attaining the Department's basic objectives.

The fact that telecommunication policies require an "outward-looking" orientation to encourage the sector to be successful on world markets, in contrast to the cultural industries for which the domestic market must come first and foremost, led the workshop to discuss whether the DOC has confused mechanisms and objectives in its efforts to attain policy goals. It was suggested, for instance, that DOC telecommunications objectives may not require the application of new foreign ownership rules to all facility-based telecommunications carriers; these may indeed even be harmful in some sectors where they may constrain the development of international strategic alliances which would bring technology to Canada and/or assist Canadian-based firms in developing a strong presence in foreign markets. It was also advanced that the 20% ownership policy is in any event "not sustainable" beyond the medium term because of external pressures the sector and DOC are soon likely to experience. Thus it will be necessary to rethink the ownership policy instrument.

The issue of "globalization is outpacing policy-makers" was also briefly touched upon in regard to the cultural sector. Here, globalization has affected the English and French-language audio-visual industries in different ways. It was noted that the greater part of media "globalization" is occurring in English which is felt, in part, on the French-language side. For example, Canadian French-language producers are experiencing increasing difficulty to work in the French language, even on projects undertaken by means

of the Canada-France co-production accord. On the English side, the production values and style of Hollywood products is becoming more dominant in the world market and Canadian producers are under increasing pressure to produce this type of product. Concerns were raised at the workshop that the present situation demonstrates that current policy instruments for the audio-visual sector may not be sufficient to deal with a changing global environment.

The challenge to meet the threats and opportunities presented by globalization is equally pressing on the telecommunications side. Tentative Canadian efforts such as Vision 2000 will soon confront the results of initiatives like Europe's 1992 single market and its extensive RACE and ESPRIT programs. Canada's R & D and S & T policies appear minuscule in comparison and do not represent a sufficiently high strategic commitment between the Federal Government and the private sector. The Government and DOC need to rethink how this essential work can be done, in order to keep the country abreast of the latest technological developments and applications.

In summary, globalization is threatening to outpace the policy decisions of the Department for both telecommunications and culture. While the basic objectives set for these sectors remain valid and laudable, the policies and mechanisms shaped to attain these objectives may now have outlived their usefulness and even be working at cross-purposes. Thus DOC policies and mechanisms should be subject to a critical review. This review should focus on the interaction both between policies and mechanisms and between the Department and its external policy environment.

### **A Closing Window of Opportunity**

The workshop acknowledged that the Department has reason to be proud of its achievements in telecommunications and, recently, in the cultural industries. The message was clear, however, that while we still hold a lead in some areas, the DOC and its mandate is at risk of being overtaken by events. **Many of the policy instruments previously used by the DOC risk being surpassed by economic, technological and social events.** There is a certain urgency to the situation; the need to ensure Canada's competitiveness, anticipate an increasingly complex policy environment and reconcile the Department's policies and mechanisms in order to ensure that mandate objectives are met, all mean that the Department must tackle the issues of a globalized world environment before its prerogative to take action and launch initiatives becomes more fully constrained.

The nations which will successfully make the transition to a global economy will be those that place a top priority in possessing a competitive edge in the efficient and reliable conveyance of information. Canada is still one of the leaders in this area, but its position is quickly slipping. **Now is the time to act while the country is still in a position of strength; to try to catch up later will be much more difficult.** The workshop noted that telecommunications policy which creates a unified domestic market and provides for the nation-wide application of regulations should be enacted to ensure that Canada will have the telecommunications network it needs to competitively enter the 21st century. At stake is no less than the continued viability of domestic firms and Canadian economic competitiveness.

Tremendous technological advances are playing a major role in the globalization of world markets and firms. Current estimates to develop the next generation of (ISDN) main switches place the cost at more than \$1 billion. It is partially in the face of such costs that the Europeans have embarked on several continent-wide co-operative development ventures. In short, while participants agreed that Vision 2000 is a good start, the limited resources of Canada, combined with the mounting costs of R & D and shortening development cycles, all mean that concerted national efforts are extremely important. These efforts should involve the establishment of government-university-industry partnerships. Such collaborative activities will need to have flexibility and responsiveness to industry requirements as their hallmarks. The time has arrived for the DOC to consider what policies and instruments are needed to help Canadian industry compete in an increasingly fierce international environment.

In the area of culture and society, meanwhile, the ongoing challenge that globalization pose to Canadian mass media industries suggests that the DOC should redouble its efforts; the aggressive and well-financed global corporations which would like to make Canada part of a homogenized, "MacDonald's" world media market are relentlessly pursuing their task. The measures immediately available to the DOC include passing the legislation currently in the system, such as those on broadcasting and film distribution, and also coordinating the more careful use of current instruments such as tax incentives. **But time is of the essence as the life-span of these measures is limited; regulatory instruments are increasingly outflanked by technological developments, while government expenditures can never be large enough to meet all needs,** particularly given likely DOC future budgetary allotments. Thus Canadian cultural industries must be rendered internationally viable and competitive within the foreseeable future, because after that a truly open international market in cultural products will probably exist. This



development will occur simultaneously with a lessening of the Canadian government's ability to either shield or aid domestic cultural producers.

It is clear that the Department needs to develop new policy instruments. While the workshop did not have a chance to consider the form these might take, old ways of doing things are obviously inappropriate in a new era where the best defense is an effective offense. The DOC will need to bring much energy and resolution to ensure that Canadian communications and culture experience the maximum of opportunities that the process of globalization may bring, and the minimum of threats. Workshop discussion indicated that future policies need to be characterized by flexibility; this is as true of those designed for the cultural domain, where particular Departmental vigilance will continue to be required, as is the case for the telecommunications sector.

The workshop suggests that the DOC might only have 10 years left in which to act. At the beginning of the next decade and next century, if Canadian telecommunications and cultural industry sectors are not producing at world standards, they will cease to have a role in the world economy. Given the strategic importance to the country of these sectors, such a result would have substantial impact on the ability of the country to maintain its position in the world.

APPENDIX I

REGISTERED PARTICIPANTS  
FOR GLOBALIZATION WORKSHOP

**SADM SECTOR (62+6)**

Louise Philippe - SADM

Philip Palmer - DLS

Marion Haunton - DLS

David Nobbs - DLS

Denis Kratchanov - DLS

Hélène Sheedy - DLS

Eve Poulin - DLS

Ruth Mayost - DSPC

Dan Rainboth - DIAB

Gaetane Laplante - DPE

Helen Macdonald - DPE

Erica Claus - DPE

Bill Graham - DPE

Parke L. Davis - DSIS - DGTP

Doug MacEwen - DSIS

Susane Latrémouille - DSIS

Colette Jubinville - DSIS

Max Melnyk - DSRs

David Warnes - DSRs

Dora Mozes - DFR

Hélène Kennedy - DFR

Serge Presseau - DNS

Hélène Lacasse - DNS

Ches Netten - DNS

Kate Cockerill - DGIR

Margaret Watley - DGIR

Sylvie Séguin - DGIR

Derek Musti - DGIR

Elizabeth Chatillon - DGIR

Jacques Lalonde - DGIR

Vladimir Skok - DID - DGIR

Lucien Villeneuve - DID

Charles Vallerand - DID

Raymond Lepage - DID

Tamara Ardruszkiewicz - DID

James Savage - DIA

Pierre Gagné - DIA

Bruce Gracie - DIA

Pierre Leduc - DPT

Stephanie Perrin - DPT  
Philippe Baillargeon - DPT  
Nathalie Bradbury - DLC  
Louise Terrillon Mackay - DLC  
Francine Lecours - DLC  
Josette Couture - DLC  
Wendy McGrath - DLC

Gwen Andrews - DCPL - DGFP  
Michelle Guay - DGFP  
Monique Lajeunesse - DCPL  
Michelle Racette - DFP

Philip Kinsman - DGIS  
Alain Bernard Marchand - DGIS  
Daniel Lussier - DGIS  
Michael Holmes - DGIS  
Marc Séguin - DGIS  
Attilo Barcados - DGIS  
Ghislaine Roy - DGIS (not attending)

Michel Durand - DSP - DGSP  
Everett King - DSF  
Hubert Lussier - DSF  
Yves Theoret - DPG  
Patrick Hollier - DPG

Bart Van Cromvoirt - DGSP

Peter Robinson  
Jan D'Arcy - National Film Board  
Mario Bolduc - Telefilm  
Pietro Securo - Telefilm  
B.G. Hutton - External Affairs  
Tim Denton  
Bill Anderson - PMO

#### ADMCM (1)

Alain Seguin - DFM - DGFM

#### ADMAC (27)

Bernard Miquelon - DMT

Anne Ladouceur Séguin - DRS - DGAP  
Dr. M.A. Malik - DRS  
Krystyna Chelminska - DRS  
Thomas Tegtmeyer - DRS  
Denis Catafard - DCT - DGAP  
John Foote - DPA

Terry Cheney - DHP - DGCI  
Chuck Sutyla - DHP  
Patrice Moreau - DGCI  
Linda Mayer - DFVP - DGCI  
Anne-Marie Turcotte - DFVP  
Robin Jackson - DFVP  
Gareth Sansom - CAVCO - DFVP  
Guy Mayson - DFVP  
Marie-Claude Girard - DPS

Judy Brown - DPS  
Nadia Laham - DPS  
André Rousseau - DPS

Larry Durr - DBP-E - DGBP  
Ted Ledingham - DBP-E  
Mark Curfoot Mullington - DBP-E  
Michel Normandeau - DBP-F

Mary Loo Myers - CHIN  
Ann-Marie Juwah - CHIN

Hélène Espeset - ADU - DGMH (rapport seulement)

#### ADMTR (28)

Bernie Lee -DST - DGGT

Mike Palfreyman - DGCD

Arthur Cordell - DGCP  
Dan Byron - DGCP  
Sandi Macdonald - DTP - DGCP  
Susan Baldwin - DTP  
Bev Mahony - DPP  
Jeet Hothi - DPP  
Julie Ginley - DPP  
Jean-Yves Fortin - DPM  
Irena Streibl - DPM



Keith Chang - DPM  
Louise Campbell - DAC  
Clive Oakes - DAC  
Terry Kerr - DAC  
L.J. Croskery - DAC  
Andrew Cameron - DAC

Bob Baser - DAC  
Prabir Neogi - DDI  
Randy Zadra - DDI  
Fred Van Geest - DDI  
Richard Simpson - DDI  
Winnie Pietrykowski - DMS  
Brenda Patterson - DMS  
Patrick Julien - DMS  
Ches Netten - DMS  
James Ladouceur - GTA  
George Dutch - GTA

#### ADMSR (9)

Rose Sirois - Sector Coordination - ADMSR

D. Paskovich - DASM - DGEP  
Paul Vaccani - DASM  
Henry Mar - DLRP  
Michel Gaudreau - DLRP  
John Chang - DSE

Doug Forde - DBC-E - DGBR

Dave Thomas - DAP

Hubert Pambrun - Ontario Region

#### SMAQ (3)

W.A. McCrum - DSI - DGRI  
André Martin - DDT/DGDR  
Pierre Billon - ATAC - DGRI

#### Panelists/Speakers (12)

G. Warren

M. Tiger (rapporteur)  
S. Bryce  
P. Audley  
L. Beaudoin  
G. Hughes  
D. Roseman  
S. Macdonald  
D. Mulcaster  
P. Racine  
R. Tritt  
J. Gilbert

Organizers (6)

D. Waung  
S. Jeannotte  
R. Hall  
J. Jang  
S. Loranger  
P. Kim

**TOTAL ATTENDANCE EXPECTED: 158**

## APPENDIX II

### WORKSHOP AGENDA

**GLOBALIZATION OF COMMUNICATIONS AND CULTURE:**  
**CAN CANADA KEEP UP?**

Friday, June 29, 1990  
Lecture Hall, Main Floor, National Gallery of Canada,  
380 Sussex Drive, Ottawa

9:30      **Introductory Address by Workshop Chairman**  
**DOC in the Global Environment**

In communications and information technology - can we maintain our international reputation and will our industries be able to compete? Regarding Canada's cultural industries, in the future will Canadians be able to choose Canadian?

Gabriel I. Warren, Director General, International Relations, Communications Canada (DOC)

10:00      **Overview: Globalization In real terms**

The implications of communications/culture convergence, globalization of markets and networks and global competitiveness. What are opportunities and threats which DOC must not ignore?

Sandy Bryce, Director, Economic and Trade Analysis Division, External Affairs and International Trade Canada (EAITC)

10:30      **Coffee Break**

10:45      **Expert Panel: The view from outside DOC**

Are we on track or, if not, does Canada still have a chance? What direction should the Department's strategic objectives take?

Paul Audley, Cultural Industries consultant.

Louise Beaudoin, Director, Distribution, Marketing and International Affairs, Telefilm Canada.

Graham C. Hughes, President, Information Technology Association of Canada (ITAC).

Dan Roseman, Multilateral Trade Negotiations, External Affairs and International Trade Canada (EAITC).

Presentations, panel discussion, questions and answers with workshop participants

Moderated by G. Warren  
Rapporteur: Michael Tiger

**12:30**            **A "global luncheon" - hosted by the International Relations Branch, DOC**

**13:30**            **COMMUNICATIONS CANADA STRATEGIC PANEL**

**Should DOC realign it's domestic policies and if so, to what extent can we expect these policies, and their related instruments, to have an influence on enhancing Canadian industrial competitiveness and cultural identity in the face of the dynamic global environment.**

**Eliminating the hype surrounding globalization, what should be the focus of our strategic objectives and which instruments are truly at the Department's disposal?**

**Introduction by Chairman G. Warren, summary of the morning's Expert Panel by Michael Tiger.**

**Sandra MacDonald, Director, Broadcasting Regulatory Policy  
David Mulcaster, Director General, Communications Development and Planning  
Paul Racine, Director General, Telecommunications Policy  
Robert Tritt, Director, International Trade Policy  
John Gilbert, Director General, Government Telecommunications Agency**

**Presentations, panel discussion, and questions and answers with workshop participants.**

**15:30**            **Wrap up**

**G. Warren**

**May 28, 1990**

GLOBALIZATION OF COMMUNICATIONS AND  
CULTURE : CAN CANADA KEEP UP? : REPORT  
ON THE WORKSHOP HELD ON 29 JUNE 1990

TARIO

QUEEN JX 1395 G563 1990  
Canada. Communications Canad  
Globalization of communicati

DATE DUE

APR - 5 1997

APR - 3 2009



Canada