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**Environmental Industry**

# Canada's International Business Strategy

**1996-1997**



Team Canada - Équipe Canada

# Canada's International Business Strategy

is made up of an **Overview** highlighting Canada's international business development priorities, and a series of **Industry Sector Strategies**, which include lists of planned international activities.

The following documents are available:

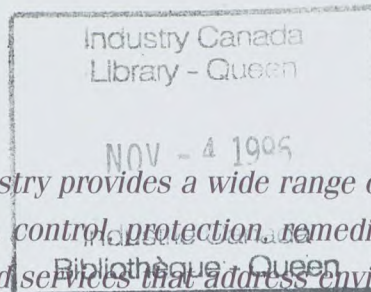
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| 6. Bio-Industries                                  | <i>Computers, Peripherals and Instrumentation</i>                   |
| 7. Business, Professional and Educational Services | <i>Electronic Components</i>                                        |
| 8. Chemicals, Plastics and Advanced Materials      | 16. Medical and Health-care Products and Services                   |
| 9. Construction Products and Services              | <i>Medical Devices</i>                                              |
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| <i>Apparel</i>                                     | <i>Health-care Services</i>                                         |
| <i>Textiles</i>                                    | 17. Metals, Minerals and Related Equipment, Services and Technology |
| <i>Footwear</i>                                    | 18. Oil and Gas Products and Energy Equipment                       |
| <i>Sporting Goods</i>                              | 19. Resource Equipment and Technology                               |
| <i>Pleasure Boats and Equipment</i>                | <i>Agricultural Technology, Machinery and Equipment</i>             |
| <i>Tools, Hardware and Housewares</i>              | <i>Ocean and Marine Shipboard Technology</i>                        |
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| <i>Business and Institutional Furniture</i>        | 21. Tourism                                                         |
| <i>Giftware and Crafts</i>                         | 22. Urban Transit and Rail Equipment                                |
| 11. Electrical Power Equipment and Services        |                                                                     |
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| 13. Fish and Seafood Products                      |                                                                     |

**For information on how to receive the Overview, or additional Industry Sector Strategies, please call: 1-800-267-8376.**

*All monetary figures in this document are expressed in Canadian dollars unless otherwise indicated.*

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*Aussi disponible en français sous le titre Industrie de l'environnement.*



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**C**anada's rapidly growing environmental industry provides a wide range of pollution prevention and environmental conservation, control, protection, remediation and enhancement technologies, processes, products and services that address environmental problems and opportunities. Because the use of fossil fuel energy figures strongly in environmental problems, alternative energy and energy efficiency are also considered to be key components. Canada's environmental industry is an enabling industry. Its success in developing efficient solutions for its domestic customers will be critical not only to its own long-term international competitiveness, but also to that of many other Canadian industrial sectors.

Canada continues to support international activities in this industry that are aimed at improving productivity and increasing export earnings. This will be accomplished by enhancing and enlarging Canada's share of established markets with innovative technologies and capabilities targeted at niche market opportunities, and by pursuing opportunities with international financial and donor organizations in developing world markets. Also included are activities that promote investment in Canada, technology transfer and partnerships with foreign firms.

## Canadian Position

The Canadian environmental industry comprises approximately 4500 small and medium-sized enterprises (SMEs) and employs about 150 000 people. An estimated two-thirds of these firms provide services such as consulting, environmental and energy engineering, and scientific and technical services in a wide range of areas from spill prevention and remediation, geomatics and remote sensing and waste management, to private laboratories and research firms. The remaining firms include manufacturers of products such as membranes for water treatment, heat exchangers, ventilation systems, clean process and recycling equipment, alternative fuel vehicle components and small hydro turbines. The industry is particularly strong in the production of monitoring and measurement instrumentation and energy efficient buildings.

Of an estimated industry total of \$11 billion in annual revenues, the manufacturing component generates about \$6 billion. It produces an estimated \$130 000 of output per worker, which is 25 percent above the average for other manufacturing sectors, and double the average rate of the economy.

Fifteen to twenty percent of total industry revenues come from exports. Approximately 800 firms are exporters, with 80 percent of sales to the U.S. market. The industry is regionally concentrated, with 40 percent of revenues generated by firms located in Ontario, 20 percent each by firms in Quebec and the Prairies, 15 percent in British Columbia and 5 percent in the Atlantic region.

Building on Canada's solid environmental science and technology base, Canadian firms are establishing consortia to develop technologies and processes to address both domestic and international environmental problems. Canada's environmental industry is continuously evolving from a focus on end-of-pipe pollution-control techniques toward pollution prevention and more efficient processes, as well as toward more total solutions to overall environmental problems or needs.

Canada is highly regarded internationally for the following reasons:

- competitively priced, high-quality products/services that meet or exceed most existing international regulations and emission-control standards;

- well-qualified human resources;
- good market intelligence for guiding product development and marketing;
- good local representation arrangements to support medium- to long-term business development;
- financial and contractual support from trade development agencies such as EDC (Export Development Corporation) and the Canadian Commercial Corporation (CCC); and
- well-established co-operative relationships with developing countries, including the high-quality international development assistance programs of the Canadian International Development Agency (CIDA).

Canadian firms do well at winning contracts when there is a demand for basic environmental planning regulatory infrastructure, monitoring and evaluation. However, the industry has more difficulty developing the delivery and financing packages for BOT (build, operate, transfer) projects, and longer-term capital investments. The international competitiveness of many Canadian firms is constrained by their small size, the need for international partners and the increasing need to respond to evolving international standards and requirements.

## International Environment

Canadian firms have captured about 3.5 percent of the world market, which is forecast to grow to US\$600 billion by the year 2000. Global competition is intense, and Organization for Economic Co-operation and Development (OECD) countries dominate the sector with some 80 percent of the world market. At the same time, developing countries are acquiring increasingly sophisticated domestic environmental expertise, making local partners a prerequisite for doing business in many of these countries.

The United States remains by far the world's largest market, followed by Western Europe and Japan. World market forecasts call for an average annual growth rate of 8 percent until 1998. The fastest-growing markets are Southeast Asia (16 percent), Eastern Europe (14 percent) and Latin America (12 percent), although their total expenditures remain relatively modest at \$6 billion, \$14 billion and \$6 billion respectively.

The United States remains the largest, most accessible market for Canadian firms. Market priorities here include integrated waste management and air pollution controls. Similar to the situation in Europe, the market in North America is maturing. While there continues to be significant potential for growth, there is also increasing rationalization and consolidation within the industry, as illustrated by recent developments with laboratories and hazardous waste services.

The North American Free Trade Agreement (NAFTA) has focussed Canadian industry on trade, investment and technology-development opportunities south of the border. While firms were initially enthusiastic about the Mexican market (originally forecast to grow at 15 percent per year), the devaluation of the peso has at least temporarily slowed activities. South America has proven to be a promising market, providing an interesting opportunity for furthering Canadian investment and trade partnering initiatives, particularly in Chile, Argentina and Brazil.

Many of Canada's embassies abroad have identified the environmental sector as one of the three most promising in terms of opportunities for Canadian exporters. Most recently, the government's strategy for India, as outlined in Focus India, has identified this sector as offering excellent opportunities for Canadian services and technologies. Burgeoning Asian growth in China, Korea, Taiwan and the Association of Southeast Asian Nations (ASEAN) has been attracting many Canadian firms. A solid core of firms is now active in Indonesia, Malaysia, Singapore and Thailand, where Canadian consortia and individual companies have won a number of contracts.

Within Europe, environmental requirements and standards have become an important trade policy issue, driving many firms to improve their environmental performance. A set of international environmental standards (ISO 14000) is emerging, which should help to simplify marketing for Canadian firms to many European markets. The establishment of industry consortia will continue to be an effective and efficient means for Canadian firms and Canadian public-sector institutes to pursue environmental opportunities and contracts in and transfer Canadian technologies to Eastern Europe.

Other factors are also emerging as strong forces in the international marketplace. International financial institutions (IFIs) continue to increase their commitment to environmental projects, in

addition to requiring stringent examination of the environmental implications of all the projects they finance. In 1994 alone, the World Bank loaned in excess of US\$10.2 billion to projects supporting environmentally sustainable development. The World Bank is an important participant in the Global Environmental Facility (GEF) initiative, a US\$2-billion, three-year pilot project to provide grants to developing countries aimed at protecting the global environment in ways that are consistent with national development goals. Canada's Task Force on IFI Procurement identified a number of high-potential countries in Asia (China, Indonesia, India, the Philippines, Vietnam), Latin America, North Africa and Eastern Europe for targeted action in the environment sector.

Public demand for the resolution of environmental problems remains a key market driver for environmental products and services. Environmental responsiveness is strategic to all industrial sectors, and key to the economic sustainability of both developed and developing countries.

The industry is continuing to grow and evolve. Certain subsectors of the global market are growing more rapidly as a result of burgeoning world demand for energy efficiency and renewal, for the sustainable management of natural resources and biodiversity, and for more global responsiveness to issues such as climate change and ozone depletion. These also represent real market opportunities for forward-looking Canadian firms.

## Main Challenges

- effectively and efficiently focussing on pollution prevention and providing total solutions;
- better focussing government-wide resources for greater leverage in priority markets;
- building size, strength and competitiveness of the Canadian environmental industry through joint ventures, alliances and partnerships among Canadian firms, with developers of technology and with public-sector groups as appropriate, in both domestic and international markets; and
- identifying and capitalizing on emerging opportunities in international markets that stem from large capital projects, local government initiatives and international agreements, by increasing private-sector understanding of

BOT project financing, and developing and coordinating the availability of Canadian industry resources for export markets.

## Strategic Direction

The Canadian Environmental Industries Strategy, developed after extensive national consultations with various industry and government stakeholders, includes a number of initiatives to address these challenges and enhance international business development in this sector, including:

- **Environmental Market Intelligence Initiative:** collect and disseminate to industry product/market information and industrial intelligence (Industry Canada [IC] and the Department of Foreign Affairs and International Trade [DFAIT]);
- **International Environmental Management Initiative:** transfer Canadian public- and private-sector expertise and training relating to regulations, policies and technical programs to developing countries, with a view to the subsequent export of Canadian environmental systems, equipment, expertise and technologies (Environment Canada [EC], IC, CIDA, DFAIT);
- **International Environmental Conventions and Agreements Initiative:** identify and target specific projects and programs that arise from international agreements, with a focus on those supported by IFIs (CIDA, IC, EC); and
- **Strategic Alliances for Export Markets Initiative:** support the establishment of consortia and alliances among SMEs with complementary strengths to form a competitive Team Canada<sup>1</sup> package (IC, DFAIT, EC).

While federal leads and joint leads have been identified on these initiatives, the result of ongoing consultations in international business development will identify other key federal, provincial and industry sector stakeholders prepared to participate in the development, delivery and resourcing of these initiatives.

Other significant and complementary activities include:

- **Country-to-country co-operative arrangements** such as memorandums of understanding (MOUs), which help build sectoral relationships that improve trade/market access;

<sup>1</sup> To serve business more effectively, the Government is pursuing new approaches, based on a Team Canada partnership with the provinces and the private sector, to help Canadian enterprises compete internationally.

- Canadian Environmental Technology Advancement Centres (CETACs), which offer comprehensive technical and business services to help SMEs commercialize environmental technologies and capture domestic and international markets; and

- Canadian Environmental Training Opportunities Program (CETOP), which promotes Canadian environmental training courses and work terms in Canada for experts and operators from other countries.

An important element of the Canadian Environmental Industry Strategy will be its Steering Committee, which will include representatives from key federal departments and agencies and other key stakeholders in the sector.

## References

*A Strategy for the Canadian Environmental Industry*, September 1994, Industry Canada, Environment Canada. Available by calling (613) 954-3080 or (819) 953-5921.

## Contacts

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International Trade  
Trade Opportunities Division  
125 Sussex Drive  
Ottawa K1A 0G2  
Tel: (613) 996-0670  
Fax: (613) 943-8820

Activity	Date	Location	Dept.	Contact
<b>Africa and the Middle East</b>				
Tunisia: Lubricating Oil Recycling Technology: Strategic Partnering	01-Apr-96	Ottawa	NRCan	613-995-1493
Technical and Business Mission from Tunisia	15-Apr-96	Montreal/Toronto	DFAIT	613-944-8134
Afriwater '96: Info Booth	02-Sep-96	Johannesburg	DFAIT	613-944-6590
Environmental Mission from Egypt	01-Oct-96	Montreal/Toronto	DFAIT	613-944-8134
<b>Asia-Pacific South</b>				
Canadian Environmental Speakers Program: Promotion	01-Apr-96	Australia TBD	DFAIT	613-995-7652
Thailand: Environmental Sector Market Studies	01-May-96	Bangkok	DFAIT	613-995-7662
Entech ASEAN Show: Mission to Malaysia and Thailand	10-Jun-96	Kuala Lumpur/ Bangkok	IC	613-954-2938
Vietnam: Environment Market Survey	01-Jul-96	Vietnam	DFAIT	613-995-8744
New Zealand: Canadian Speaker on Waste Water Treatment	25-Aug-96	Nelson	DFAIT	613-996-1052
Solar Crop Drying Trade Mission to Southeast Asia	01-Sep-96	Jakarta/ Kuala Lumpur	NRCan	613-996-6078
Environmental Business Delegation to the Asian Development Bank, Philippines and Indonesia	01-Nov-96	Manila/Jakarta	IC	613-954-2938
<b>Central/Eastern Europe and the Commonwealth of Independent States</b>				
Romania: Activities under the MOU on Environmental Co-operation	01-Apr-96	Canada/ Romania TBD	IC	613-941-4517
Poland: Activities under the MOU on Environmental Co-operation	01-Apr-96	Canada/Poland TBD	IC	613-941-0886
Energy Efficient Building Mission to Russia	01-Apr-96	Russia TBD	NRCan	613-769-1242
EnviBrno '96: Info Booth	07-Nov-96	Brno	DFAIT	613-996-1530
POLEKO '96: Info Booth	19-Nov-96	Poznan	DFAIT	613-996-1530
Housing Demonstration Solo Show in Slovenia	01-Feb-97	Ljubljana	NRCan	613-943-2260
<b>East Asia</b>				
Pearl River Delta Environmental Consulting Market Study	01-Apr-96	Hong Kong/ Guangdong	DFAIT	613-995-8606
China: Activities under the MOU on Environmental Co-operation	01-Apr-96	Canada/ China TBD	IC	613-941-4517

Note: Dates and locations are subject to change.

Activity	Date	Location	Dept.	Contact
Taiwan: Activities under the Bilateral Agreement on Environmental Co-operation	01-Apr-96	Canada/ Taiwan TBD	IC	613-941-4517
Canada-China Energy and Environment Newsletters: Promotion	01-Apr-96	Canada/China	NRCan	613-769-1242
Canadian Building Technology Demonstration Projects	01-Apr-96	China TBD	NRCan	613-769-1242
China-Canada Energy Efficiency Centre: Promotion	01-Apr-96	Beijing	NRCan	613-769-1242
High-performance Windows Joint Venture Opportunities: Mission	01-Apr-96	Seoul	NRCan	613-943-0951
Energy Efficient Building Technologies Promotion	01-Apr-96	Hong Kong	NRCan	613-769-1242
Small Hydro Power Mission to China	01-Apr-96	Hangzhou	NRCan	613-996-6119
Environmental Products and Services Market: Study	15-Apr-96	Delhi	DFAIT	613-996-5903
Clean Coal Technology for Electric Power Generation: Strategic Partnering	01-Jun-96	Seoul	NRCan	613-995-1493
Environmental Technology China '96: Info Booth and Mission	02-Jul-96	Beijing	IC	416-973-5159
Taipei International Environmental Show: Info Booth	13-Jul-96	Taipei	DFAIT	613-995-8744
Environmental Trade Mission	16-Sep-96	Delhi/Bombay/ Madras	DFAIT	613-996-5903
Waste Treatment Seminar	01-Oct-96	Hong Kong/ Southern China	DFAIT	613-995-8606
Environmental Seminar	01-Nov-96	Seoul	DFAIT	613-995-8744
Harbour Waste Management Seminar	05-Nov-96	Taipei/Kaohsiung	DFAIT	613-995-8744
Hong Kong: Environmental Mission	01-Jan-97	Canada TBD	DFAIT	613-995-8606
Pune, India: Trade Show: Info Booth	02-Jan-97	Pune	DFAIT	613-996-5903
Enprotech '97: National Stand	15-Jan-97	Taipei	DFAIT	613-995-8744
Environment '97: Info Booth	09-Feb-97	New Delhi	DFAIT	613-996-5903
<b>Japan</b>				
Super Efficient Housing Export Promotion for Japan	01-Apr-96	Ottawa	NRCan	613-943-0951
Environmental Mission	06-Jun-96	Japan TBD	DFAIT	613-995-1677
Canada-Japan Annual R-2000 Housing Conference	09-Jun-96	Ottawa	NRCan	613-996-8151
Canada-Japan Advanced Housing R&D Conference	10-Jun-96	Ottawa	NRCan	613-943-0915
<b>Latin America and the Caribbean</b>				
Fuel Ethanol from Biomass: Seminar	01-Feb-96	Santiago	NRCan	613-996-8732
Activities under the MOU on Environmental Co-operation	01-Apr-96	Canada/Chile TBD	IC	613-954-3434
Enviro-Pro: Info Booth, Seminar, Workshops	11-Sep-96	Mexico City	DFAIT	613-996-8625
International Environmental Management Initiative (IEMI): Strategic Partnering	01-Apr-96	Nicaragua TBD	IC	403-951-8741



Activity	Date	Location	Dept.	Contact
Toronto Environmental Trade Show and Conference: Mission from the Caribbean Countries	07-May-96	Toronto	DFAIT	613-943-8807
Grid-connected and Stand-alone Photovoltaic Systems: Technology Transfer	01-Jun-96	San José	NRCan	514-652-5346
Water Quality Technology Exchange Workshop	01-Jun-96	Buenos Aires	IC	613-954-3434
Environmental Management Seminar	01-Aug-96	Buenos Aires	DFAIT	613-996-5549
Environmental Mission from the Caribbean	01-Sep-96	Atlantic Provinces	IC	902-424-5205
Environmental Technology Exchange Workshop	01-Sep-96	São Paulo	IC	613-954-3434
Environmental Trade Mission from Argentina and Chile	01-Oct-96	Atlantic Provinces	IC	902-424-5205
Pulp and Paper Environmental Technology Exchange Workshop	01-Nov-96	Colombia TBD	IC	613-941-4517
Environmental Mission from Mexico	01-Jan-97	Alberta/B.C.	DFAIT	613-996-8625
Environmental Exchange Mission from Chile	04-Jan-97	Ontario/Quebec/ Alberta/B.C.	DFAIT	613-996-4199
Advanced House Demonstration Project	15-Jan-97	Tijuana	NRCan	613-996-3089
Americana '97: Mission from Mexico	12-Mar-97	Montreal	DFAIT	613-996-8625
<b>Multiple Markets</b>				
Residential Solar Water Heating and Electric Utilities Workshop	01-Jun-96	Toronto	NRCan	613-996-6078
Alternative Fuel Workshop	03-Jun-96	Windsor	NRCan	613-992-7598
Partnerships '96 : Conference	01-Sep-96	New Brunswick	IC	506-444-5891
Americana '97: Info Booth	01-Mar-97	Montreal	IC	613-954-3211
<b>United States</b>				
Canadian Speakers at Environmental Conferences and Exhibitions in the U.S.	01-Apr-96	U.S. TBD	DFAIT	613-944-9478
Enhanced Marketing in the U.S.: Seminar	01-Apr-96	Alberta/B.C./ Manitoba	DFAIT	613-944-9478
Renewable Hydrogen and Fuel Cell Fleet Demonstration: Strategic Partnering	01-Apr-96	Los Angeles/ Washington, D.C.	NRCan	613-996-6022
U.S. Environmental Opportunities Newsletter	01-Apr-96	Washington, D.C.	DFAIT	613-944-9478
Environmental Opportunities in the Mining Sector: Study	15-Apr-96	Seattle	DFAIT	613-944-9478
Municipal/Industrial Water and Waste Water Market Study	15-Apr-96	Seattle	DFAIT	613-944-9478
Air Pollution Mission to California	24-Apr-96	Los Angeles	DFAIT	613-944-9478
Partnering/Teaming Opportunities: Mission to the Midwest	30-Apr-96	Chicago	DFAIT	613-944-9478
Environmental Liaison Mission to New York State	01-May-96	Albany	DFAIT	613-944-9478
Waste Expo '96: National Stand	21-May-96	Las Vegas	DFAIT	613-944-9478

Activity	Date	Location	Dept.	Contact
Air and Waste Management Association (AWMA) Conference: Info Booth	01-Jun-96	Nashville	IC	613-954-3211
Environmental Opportunities in the Pulp and Paper Industry: Study	01-Jun-96	Seattle	DFAIT	613-944-9478
Environmental Resources Expo: Info Booth	13-Jun-96	Orlando	DFAIT	613-944-9478
Industrial Wastewater Mission	15-Jun-96	Chicago/St. Louis	DFAIT	613-944-9478
Environmental Workshop at the Savannah River Nuclear Plant	20-Aug-96	Augusta	DFAIT	613-944-9478
Brownfield Sites in Western Pennsylvania: Market Study	01-Sep-96	Pittsburgh	DFAIT	613-944-9478
Enviro Technology Expo: Info Booth	15-Sep-96	Atlanta	DFAIT	613-944-9478
Partnering/Teaming Opportunities in the U.S.: Strategic Partnering	15-Sep-96	Princeton, NJ	DFAIT	613-944-9478
Calgary Environmental Trade Show and Conference: Mission from the U.S.	01-Oct-96	Calgary	Alberta	403-427-6079
Society of American Military Engineers Conference and Trade Show: Info Booth	01-Oct-96	Seattle	DFAIT	613-944-9478
Water Environment Federation Conference and Trade Show: Info Booth	05-Oct-96	Texas TBD	IC	613-954-3211
Water Pollution Control Mission	10-Oct-96	Los Angeles	DFAIT	613-944-9468
Environmental Opportunities in the Automobile Sector: Study	30-Oct-96	Detroit	DFAIT	613-944-9478
Environment Superfund Partnership Event: Mission	01-Nov-96	Washington, D.C.	DFAIT	613-944-9478
Clean Air '96: Info Booth	19-Nov-96	Miami	IC	613-954-3211
Soil Remediation Partnering Workshop	20-Nov-96	Pittsburgh	DFAIT	613-944-9478
Industrial Wastewater Partnering and Teaming Mission	03-Dec-96	Dallas	DFAIT	613-944-9478
National Association of Home Builders Trade Show: National Stand	01-Jan-97	Houston	NRCan	613-996-3089
North Carolina Wastewater Pollution Expo: Conference	12-Jan-97	Research Triangle, Georgia	DFAIT	613-944-9478
Environmental Mining Technologies Mission	03-Feb-97	Denver	DFAIT	613-944-9478
Hazardous Waste Mission to the U.S./Mexico Border	26-Feb-97	San Diego/Tijuana	DFAIT	613-944-9478
Americana '97: Mission from the U.S.	01-Mar-97	Montreal	DFAIT	613-944-9478
U.S. Department of Energy (DOE) Technology Connection Partnership Forum: Mission	10-Oct-97	Richland, WA	DFAIT	613-944-9478

Activity	Date	Location	Dept.	Contact
<b>Western Europe and the European Union</b>				
Wastewater NEXOS Mission to Western Europe	01-Apr-96	Brussels/The Hague/ Copenhagen	DFAIT	613-996-1530
European Strategic Alliances Program	01-Apr-96	Western Europe	DFAIT	613-995-8956
Environment Technology '96: Info Booth	16-Apr-96	Birmingham	N.B.	506-444-5891
IFAT (International Fair for Wastewater Technology and Waste Disposal): Info Booth	01-May-96	Munich	DFAIT	613-996-1530
Wastewater NEXOS Mission	01-May-96	London/Rome	DFAIT	613-996-1530
Environmental Technologies NEXOS Mission	01-Jun-96	Helsinki	DFAIT	613-996-1530
International Combustion Research Symposium: Info Booth	28-Jul-96	Naples	NRCan	613-995-1493
Environmental Mission to Spain and Portugal	01-Oct-96	Lisbon/Bilbao	DFAIT	613-996-1530
Pollutec '96: Info Booth	22-Oct-96	Lyon	DFAIT	613-996-1530
Pollutec '96: Mission	22-Oct-96	Lyon	IC	514-283-4259
Environment Technologies '96: Info Booth	30-Nov-96	Ankara	DFAIT	613-996-1530
PROMA Environment: Info Booth	25-Mar-97	Bilbao	DFAIT	613-996-1530

*For up-to-date and detailed information on the activities in this document and those contained in other sectors, you may consult the CIBS Compendium. This on-line compilation of activities planned by the federal and provincial governments is continuously revised and is accessible via the Department of Foreign Affairs and International Trade World Wide Web site, at the following address: <http://www.dfait-maect.gc.ca>*

# Acronyms and Initialisms used in Canada's International Business Strategy

(This list does not include sector-specific references.)

		<b>DATE DUE</b> DATE DE RETOUR		
AAFC	Agriculture			International Business Opportunities Centre
ACOA	Atlantic Canada			Industry Canada
APEC	Asia-Pacific forum			International Development Research Centre
ASEAN	Association			International financial institution
BBS	electronic			International Standards Organization
BOOT	build, own			International Trade Advisory Committee
BOSS	Business C System			International Trade Centre
CCC	Canadian C			Ministry of Agriculture, Fisheries and Food of Quebec
CIBS	Canada's In Strategy			Multilateral development bank
CIDA	Canadian I Agency			Multinational enterprise
CIS	Commonwe			North American Free Trade Agreement
CSA	Canadian S			North Atlantic Treaty Organization
DFAIT	Departmen International			National Research Council
DFO	Departmen			Natural Resources Canada
DND	Departmen			Natural Resources Canada — Canadian Forest Service
EC	Environme			National Sector Team
EDC	Export Dev.			Organization for Economic Co-operation and Development
EU	European U			Program for Export Marketing Development
FITT	Forum for <small>CARR McLEAN</small>		<small>38-296</small>	
FORDQ	Federal Office of Regional Development — Quebec		R&D	research and development
FSU	former Soviet Union		S&T	science and technology
FTA	Canada-U.S. Free Trade Agreement		SAGIT	Sectoral Advisory Group on International Trade
GATT	General Agreement on Tariffs and Trade		SME	small and medium-sized enterprise
GDP	gross domestic product		UNEP	United Nations Environmental Program
GNP	gross national product		WED	Western Economic Diversification
HRDC	Human Resources Development Canada		WTO	World Trade Organization



# Acronyms and in Business Strate

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AAFC	Agriculture and Agri-Food Canada	IBOC	International Business Opportunities Centre
ACOA	Atlantic Canada Opportunities Agency	IC	Industry Canada
APEC	Asia-Pacific Economic Co-operation forum	IDRC	International Development Research Centre
ASEAN	Association of Southeast Asian Nations	IFI	international financial institution
BBS	electronic bulletin board system	ISO	International Standards Organization
BOOT	build, own/operate, transfer	ITAC	International Trade Advisory Committee
BOSS	Business Opportunities Sourcing System	ITC	International Trade Centre
CCC	Canadian Commercial Corporation	MAPAQ	Ministry of Agriculture, Fisheries and Food of Quebec
CIBS	Canada's International Business Strategy	MDB	multilateral development bank
CIDA	Canadian International Development Agency	MNE	multinational enterprise
CIS	Commonwealth of Independent States	NAFTA	North American Free Trade Agreement
CSA	Canadian Standards Association	NATO	North Atlantic Treaty Organization
DFAIT	Department of Foreign Affairs and International Trade	NRC	National Research Council
DFO	Department of Fisheries and Oceans	NRCan	Natural Resources Canada
DND	Department of National Defence	NRCan-CFS	Natural Resources Canada — Canadian Forest Service
EC	Environment Canada	NST	National Sector Team
EDC	Export Development Corporation	OECD	Organization for Economic Co-operation and Development
EU	European Union	PEMD	Program for Export Marketing Development
FITT	Forum for International Trade Training	R&D	research and development
FORDQ	Federal Office of Regional Development — Quebec	S&T	science and technology
FSU	former Soviet Union	SAGIT	Sectoral Advisory Group on International Trade
FTA	Canada-U.S. Free Trade Agreement	SME	small and medium-sized enterprise
GATT	General Agreement on Tariffs and Trade	UNEP	United Nations Environmental Program
GDP	gross domestic product	WED	Western Economic Diversification
GNP	gross national product	WTO	World Trade Organization
HRDC	Human Resources Development Canada		



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