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**Medical and Health-care
Products and Services**

Canada's International Business Strategy

1996-1997



Team Canada - Equipe 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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| Overview | 14. Forest Industries |
| 1. Advanced Manufacturing Technologies | 15. Information Technologies and Telecommunications |
| 2. Aerospace and Defence | <i>Overview</i> |
| 3. Agriculture, Food and Beverages | <i>Telecommunications Equipment and Services</i> |
| 4. Arts and Cultural Industries | <i>Software Products, Computer Services and New Media</i> |
| 5. Automotive | <i>Geomatics</i> |
| 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> |
| 10. Consumer Products | <i>Pharmaceuticals</i> |
| <i>Apparel</i> | <i>Health-care Services</i> |
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| <i>Footwear</i> | 18. Oil and Gas Products and Energy Equipment |
| <i>Sporting Goods</i> | 19. Resource Equipment and Technology |
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| <i>Residential Furniture</i> | 20. Space |
| <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 | |
| 12. Environmental Industry | |
| 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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This sector is made up of firms that provide a wide range of products used for diagnosis and treatment of ailments, including: medical, surgical and veterinary equipment; orthopedic appliances; prosthetics; electro-medical and dental equipment; as well as diagnostic kits, reagents and equipment.

Canadian Position

- 800 manufacturing firms employing over 17 000 people;
- approximately 90 percent of firms are Canadian-owned;
- 75 percent of all firms employ less than 50 people;
- development of regional industry associations as well as the national association, Medical Devices Canada (MEDEC), plus a number of relevant horizontal associations (e.g. Canadian Advanced Technology Association, Electro-Federation Canada Inc.);
- production: \$1.8 billion (1993);
- consumption: \$3.3 billion (1993);
- cost-squeezed domestic market dominated by multinational enterprises (MNEs), mainly U.S.-owned;
- limited value-added and international mandates for MNE subsidiaries;
- imports: \$1.7 billion (1993);
- exports: \$538 million (1993);
- key markets: U.S. and Europe;
- markets where increasing Canadian exports are likely: Mexico, Latin America, Asia, including Japan.

Recognized strengths include:

- cardiovascular: e.g. heart valves, pacemakers, catheters, electronic cardiography;
- in-vitro diagnostics: e.g. for cancer/hepatitis/sexually transmitted diseases;
- radiation therapy and therapy-planning software;
- medical imaging: e.g. 3-D imaging, image-archiving systems, ultrasound scanners;

- orthopedics/prosthetics/orthotics: e.g. myoelectric limbs;
- assistive devices/home health care: e.g. mobility aids, peritoneal dialysis;
- dental: e.g. high-speed steam sterilizers, dental implants, sundries.

As well, certain companies producing disposable products, by virtue of outstanding quality, product design or efficient processes, are making significant inroads in foreign markets.

International performance:

- 21-percent increase in exports for the period 1990-93;
- significant increases in export-import ratios in certain subsectors from 1990-93: diagnostics (60 percent); equipment and supplies (20 percent); imaging (19 percent); orthopaedics (9 percent); rehabilitation devices (6 percent).

Major markets for Canada and areas where expansion is most likely:

- The U.S. market stood at US\$38.2 billion in 1993 and that of Western Europe at US\$26.6 billion. While these markets are considered "mature," and are increasingly under cost-containment pressure, they still constitute the "bread and butter" sales of many Canadian firms and represent their main interests for export.
- The U.S., European Union (EU) and Japan account for nearly 90 percent of the global market for medical devices.
- Mexico and the more robust South American markets of Chile, Brazil and Argentina are beginning to attract Canadian interest, although the peso crisis in Mexico has slowed penetration of that market. The medical devices market in Argentina grew by 10 percent to US\$270 million in 1993, and that of Chile by 12 percent to US\$208 million. While a growth figure for Brazil is not available, that market stood at US\$816 million in 1993.

- While annual growth rates in Asian markets were in the range of 8 percent for the period 1985-89, they leapt to 18 percent from 1991-93 and an estimated 22 percent for the period 1994-95, representing a growth rate of three times that of the industrialized countries. Examples of 1993 growth rates by country in the medical devices market are: Taiwan 15 percent, Korea 18 percent, China 23 percent, Thailand 24 percent, India 15 percent. Canadian device firms have not yet developed much market presence in these markets.

Success factors include:

- **Regulations:** Canada's Food and Drugs Act permits manufacturers to export product in accordance with the receiving country's laws, irrespective of domestic approval status; this export provision has prompted some foreign-owned companies to establish export manufacturing from a Canadian base. However, where manufacturing is not specifically for export, pending regulatory changes (cost recovery and introduction of a risk-based regulatory system) may increase the overall costs to companies of selling devices in Canada.
- **Research infrastructure:** Canada has a world-class research base in its medical schools, teaching hospitals and other institutions and has an excellent infrastructure for conducting clinical trials. After telecommunications, health-care research and development (R&D) expenditures represent the second-largest sector-specific investment in R&D in Canada. Health-care R&D spending increased by an average of 14 percent annually from 1988 to 1991.
- **Favourable R&D tax policy:** Canada's tax legislation makes it an attractive location for companies to leverage their R&D investments.

International Environment

Market trends include:

- seven-percent growth in the world market for medical technology in 1993 (to \$US92.9 billion); anticipated 7-percent annual growth in global market over several years, with certain segments in excess of 20 percent.

Major international trends include:

- cost containment;
- economic growth in developing countries;

Table 1
1993 "First World" Markets (Share of World Market)
(US\$ billion)

United States	38.2 (41 percent)
Western Europe	26.6 (29 percent)
Japan	16.7 (18 percent)
Canada	2.5 (3 percent)

1993 Markets in Developing Countries
(US\$ million)

Brazil	816
China	750
Korea	730
Mexico	615
Taiwan	480
India	475
Argentina	270
Thailand	205

- changing demographics (i.e. an aging population);
- increase in home health care;
- disease-specific requirements (e.g. AIDS, hepatitis, cancer).

Geographic market trends include:

- Domestic pressures mean that survival and growth in the device manufacturing sector must come primarily from exports.
- The U.S share of the world market is expected to be less than 35 percent by the year 2000, with growth in Asian and Latin American markets accounting for a larger share of the world market.
- The EU is expected to remain a market of great importance. The implementation of a harmonized regulatory system for devices within the EU should allow for more efficient product approvals in Europe for firms that are adequately prepared.
- Growth in the Japanese market is slowing, but remains important. The expanding "silver market" (products for the elderly) and assistive devices/rehabilitation equipment market are

being underserved by domestic Japanese production, while Canada has strengths in these areas.

- Parts of Latin America, particularly Chile and Argentina, have shown market growth greater than the world average. The reduction of tariffs under the North American Free Trade Agreement (NAFTA), as well as the positive reception afforded Canadian products among companies that have already entered that market, suggest that Mexico may be an important stepping-stone to companies first venturing into Latin America.
- The Saudi Arabian and Iranian markets for medical equipment and supplies stood at US\$200 million and US\$250 million respectively in 1991 (*MediStat*, June 1993) and the United Arab Emirates in 1993 at US\$70 million (*MediStat*, August 1994). Lebanon and Jordan are currently expanding and upgrading medical facilities.
- The South African market, recently made more accessible to Canadian firms, is estimated at US\$250 million and growing at 5 percent annually (Department of Foreign Affairs and International Trade [DFAIT]).
- Estimated growth of Poland's medical technology market is 30 percent (1995), with most of this served by imports (*Clinica*, July 18, 1994). Many health-care needs in Russia and the newly independent states have not been addressed. World Bank projects directed to health-care reform in Poland and Hungary offer prospects for Canadian exporters of both medical products and services.
- World Bank lending in health and nutrition averaged US\$1.31 billion between 1991 and 1994, and is growing. The World Bank and regional development banks are aiming to strengthen capacity for formulating health policy, program planning, and management. Greater attention is being given to women's health and its effect on the health and welfare of families, to selected diseases (AIDS, in particular), and to the financing and management of the health sector, including hospitals.

International production trends include:

- The key players in medical device production are the U.S. (with 46 percent of production in 1993 or U.S. \$42.9 billion), Western Europe (29.4 percent) and Japan (17.9 percent).

U.S. companies have made a significant shift to offshore manufacturing, largely due to the regulatory climate and labour rates.

- While Japanese device firms have not been substantial exporters, they hold 71 percent of the Japanese market.
- The device industries in Taiwan, Korea and Mexico are now entering international markets.

Main Challenges

- Regulations: The regulatory environment is currently seen by industry as the most crucial factor in international competitiveness, particularly affecting investment decisions, speed of market entry and costs of both Canadian-owned companies and MNEs.
 - Cost recovery: Implementation of user fees by Health Canada, which represents part of the federal government's cost-cutting measures, must be accompanied by increased regulatory efficiency and by mutual recognition agreements (MRAs) with Canada's major trading partners to balance the increased cost to manufacturers of selling products in Canada.
 - Introduction of risk-based regulatory system: This initiative may result in higher unit costs overall and slower market entry for some products, but should facilitate negotiation of international harmonization and MRAs with Canada's major trading partners.
 - Pending ISO 9000 series quality regulations in Canada: Adoption will facilitate MRAs and harmonization as well as foreign market entry for individual companies, but will likely be a challenging transition for many smaller manufacturers, which may require training in this area.
 - Need for knowledge of regulatory requirements, such as EU directives, in target markets.
- Penetration of mature versus developing markets: Balancing efforts directed toward pursuit of new fast-growing markets, and maintaining presence in mature markets.
- Access to resources, including partners, to develop and exploit technology and penetrate foreign markets.

- Attracting and retaining investment capital/value-added mandates: Small firms have typically had problems attracting investment capital, while MNE subsidiaries face challenges of global rationalization.
- Knowledge of market opportunities and potential distribution channels, particularly in emerging markets.

Strategic Direction

The Department of Foreign Affairs and International Trade (DFAIT) and Industry Canada (IC), in collaboration with the provinces and other departments and regional agencies, as appropriate, will work to increase international competitiveness and develop exports and international linkages in the following areas.

Regulatory

- develop an industry-friendly, internationally competitive regulatory system;
- work toward completion of negotiations for an MRA with the EU for conformity assessment procedures for medical devices;
- promote industry adoption of quality systems standards;
- provide information and training on foreign regulatory requirements, particularly for the U.S. and the EU.

International Marketing

- develop and maintain an inventory of Canadian supplier capabilities in niche industry sectors;
- provide exposure for Canadian device companies in major industrialized markets (U.S., EU, Japan) for export, investment and strategic alliances, as well as in key emerging markets;
- provide information on the Japanese market for home-care/rehabilitative products (including products for the elderly);
- provide information on emerging markets and opportunities, particularly in Asian and Latin American markets;
- facilitate better flow of information on international financial institution (IFI) projects in the developing world, where IFIs are the major source of capital for health infrastructure projects.

Strategic Partnerships

- use industry associations to channel information and training to industry. This will facilitate collective responses both to opportunities and to such challenges as regulatory change, and will promote efficient communication mechanisms within the sector. However, to maximize its effectiveness, the industry needs to strengthen its regional and national associations;
- promote strategic alliances for small and medium-sized enterprises (SMEs);
- use Industry Canada's electronic information product on Medical Devices Strategic Alliance Opportunities to forge international linkages.

Investment

- undertake initiatives to introduce Canadian SMEs to international sources of investment capital;
- undertake initiatives to encourage MNEs to further invest in Canadian operations and to consider export and research mandates, as well as to retain existing investment.

Note: Market figures quoted herein are taken from reports by the Health Industry Manufacturers Association, Washington, D.C.: *Global Medical Device Market Report: Markets for Health Care Technology Products (Revised 1994 Edition)* and *The HIMA Emerging Market Report (1994)*.

The Canadian pharmaceutical sector is composed of researchers, developers and manufacturers of pharmaceuticals, medicines, and diagnostics.

Canadian Position

- major segments within sector: multinational subsidiaries, generic drug manufacturers (and the related fine chemicals industry), firms developing innovative bio-pharmaceutical products and non-prescription drug manufacturers;
- employment: 22 000 people (1993);
- shipments: \$4.3 billion, of which 15 percent is exported (1993);
- domestic market: \$6 billion (1994), an increase of 2.5 percent over 1993;
- exports grew rapidly from \$260 million in 1991 to \$667 million in 1994, with shipments to the U.S. increasing from 48 percent to 62 percent in same period;
- imports rose from 30 percent of the market in 1991 to 39 percent in 1994, with active ingredients (dosage medicaments) accounting for approximately 60 percent of imports;
- trade deficit: \$1.6 billion (1994), up from \$0.9 billion in 1991;
- approximately 120 establishments producing or distributing a full range of pharmaceutical products;
- over 40 percent of firms have less than \$2 million in sales, while 10 companies, including eight MNEs, have over \$100 million in sales. The two largest Canadian-owned companies, both generic producers, are among the top 10 in Canada and export up to 40 percent of their production.

Brand-name Drug Manufacturers

- account for over 85 percent of sales revenue in Canada;
- fund most of the innovative R&D in Canada, which has been expanded as a result of an improved competitive environment (e.g. in trade and intellectual property protection) but also due to increased recognition of Canada's inherent R&D capabilities;

- important supporters of small bio-pharmaceutical firms (financially and through licensing and marketing arrangements and other partnerships);
- many plant closures and job losses due to global rationalization, resulting, in some cases, in excess manufacturing capacity that could be used for contract work for foreign firms.

Generic Drug Manufacturers

- growing industry segment in 1994, accounted for 37 percent of all prescriptions filled in Canada;
- use competitive manufacturing technology to produce a broad range of lower-cost drug products;
- traditional business in manufacturing equivalents of pharmaceuticals whose patents have expired;
- increasing trend to full integration of activities ranging from fine chemical production, generic manufacturing and R&D into both generic drugs and innovative products;
- the two largest Canadian generics are among the top 50 R&D spenders in Canada across all sectors, both owning stand-alone bio-pharmaceutical ventures and owning or joint venturing with companies in the U.S. and other countries;
- generic exports adversely affected by Bill C-91, which prohibits Canadian generic companies from exporting any licensed drugs before they can be legally sold in Canada, even if their patent in the importing country has already expired.

Bio-pharmaceutical SMEs

- innovative firms that often depend on alliances with MNEs for funding;
- need various types of linkages in order to develop into viable commercial enterprises.

Non-prescription Drug Manufacturers

- \$2 billion (retail) annual sales in Canada;
- mainly subsidiaries of MNEs;
- small number of export mandates.

Canadian Advantages

- world-class universities, an excellent academic/scientific research community, hospitals and health-care system; strong research lead in specialized therapeutic areas such as Alzheimer's, cardiovascular, central nervous system, and gene-based diseases;
- tax legislation that makes Canada an attractive location for companies to leverage R&D investments;
- regulatory memorandums of understanding (MOUs) with a number of countries; negotiations in process for MRA with the EU;
- quality manufacturing and processing capability as a result of sophisticated regulatory system and discriminating cost-conscious market.

International Environment

- global market of \$163 billion for ethical pharmaceuticals (1992-93);
- expected growth of 2 percent to 3 percent in industrialized countries with higher rates in developing countries, especially in South America, Asia and Eastern Europe;
- main export interests for generic manufacturers are the U.S. and Europe, as these markets open up to generic substitution;
- some opportunity in developing countries (e.g. South Africa), which are modernizing public-health systems and searching for inexpensive, high-quality products;
- factors reshaping the industry in Canada and internationally include:
 - cost-containment pressures;
 - changing demographics in industrialized countries;
 - explosion of demand in non-traditional markets;

- restrictions on drug pricing and accessibility (e.g. through restrictive drug formularies, lower-cost drug substitution, pharmaceutical benefit management, managed care organizations);
- increased incidence of catastrophic or long-term illnesses associated with age and specific diseases such as AIDS;

- growing social acceptance of alternatives to prescription drugs (e.g. "natural" medicines, preventative health care);

- major markets: U.S., U.K., Japan, Germany, Italy, France;
- market domination by U.S. and EU brand-name MNEs with increase in production by Japanese firms over the last decade;
- managed care and expiration of patents on many "blockbuster" drugs causing shift in MNE business orientation to include more focussed product development, generic product lines, and a new emphasis on wholesale and distribution networks.

Main Challenges

- need for government cost-recovery regimes to be competitive with those of Canada's trading partners;
- greater harmonization of international standards and an improved regulatory system with faster approvals;
- balancing international obligations and commitments under the World Trade Organization (WTO) and the North American Free Trade Agreement (NAFTA) with the need to maintain a supportive domestic policy environment;
- ensuring the operation of a rules-based international regulatory regime;
- need for ongoing monitoring of the regulatory framework and business practices in competing and target countries;
- more timely and reliable information on the business climate, health-care services, competition, and emerging opportunities in foreign markets;
- identification of linkages with other industrial and service sectors and the opportunities these afford for Canadian companies;

- greater understanding of corporate investment decision making, both foreign and domestic, and of individual corporate strategies for growth and change as they affect all sectors of the industry;
- greater awareness of foreign market opportunities and risks;
- access to international markets through alliances with corporate partners.

Strategic Direction

Regulatory

- provide information on regulatory climate of international markets;
- support efforts to improve international competitiveness of Canada's regulatory environment;
- pursue MRAs, MOUs and other arrangements for improved market access.

International Marketing

- promote Canada as a source of a wide variety of high-quality drug products;
- provide timely information on emerging international market opportunities and foreign business practices;
- develop mutually beneficial opportunities through foreign aid streams, e.g. promotion of goods "in kind."

Strategic Partnerships

- stimulate collaboration between the public and private sectors;
- increase co-operation with provincial governments to ensure that firms enjoy timely support in pursuing opportunities;
- develop alliances between Canadian SMEs and international pharmaceutical firms for joint R&D projects, contract manufacturing and enhanced marketing capabilities;
- develop alliances for contract manufacturing between foreign firms and Canadian brand-name manufacturers with excess capacity. As Japanese pharmaceutical companies do not have a significant presence in Canada, they are seen as potential partners.

Investment

- enhance the awareness of foreign pharmaceutical firms regarding Canadian pharmaceutical R&D capabilities and favourable investment environment;
- provide support to Canadian MNE subsidiaries for the development of information and promotional material to assist in their pursuit of global R&D and market mandates.

The Canadian health-care services sector is composed of about 2500 firms, most of which are SMEs, providing services related to the design, establishment, operation, maintenance and improvement of health-care systems and institutions on a fee-for-service basis.

Canadian Position

- \$3 billion annual sales;
 - employment: 150 000.
- Recognized strengths:
- hospital management;
 - operation of long-term care facilities and home-care organizations;
 - public health and primary health care;
 - architecture, construction and consulting engineering related to health-care facilities;
 - education and training;
 - staffing;
 - policy and planning development;
 - health economics and financing;
 - environmental health;
 - health informatics and information systems;
 - medical laboratories.

International Environment

- global market estimated at US\$5 billion to US\$8 billion;
- greatest potential for Canadian health service firms seen to be in the U.S., but IFI support in developing countries (notably Latin America and the Caribbean, Eastern Europe and the poorer countries of Asia and Southeast Asia) makes these markets (estimated at US\$2 billion) attractive as well.

Priorities in developing countries include:

- primary and preventative health care, policy and planning development, infrastructure, human-resource development, national programs for public health and wellness, women's health

and its effect on family health and welfare, selected diseases (particularly AIDS), and financing and management of the health sector, including hospitals;

- funding for health and other development projects largely obtained through World Bank or regional development banks;
- 1991 commitment by World Bank to approve projects relating to health care, population and social development of an annual minimum value of US\$800 million, with largest share destined for Latin American and Caribbean countries. World Bank projects directed to health-care reform in both Poland and Hungary also offer prospects for Canadian exporters of both medical products and services;
- medical and health-care products and services were identified by the Task Force on IFI Procurement as a key sector for active attention by the interdepartmental Capital Projects Action Team (CPAT). CPAT is a recently completed initiative aimed at focussing and co-ordinating existing government resources on a limited number of high-potential IFI opportunities where industry is exercising leadership and collective commitment. The Overview of *Canada's International Business Strategy* (CIBS) provides a description of the role of IFIs.

Priorities in industrialized countries include:

- cost-containment programs and systems, efficient managerial practices, resource optimization, insurance plans, computer information systems for patient care, billing and hospital administration, long-term care facilities and home-care operations, consolidation and privatization of the purchasing and distribution of products to hospitals, disease management and patient education functions.

International competition includes:

- key competitors traditionally from the U.S., Western Europe and some Southeast Asian countries;
- competition in the international marketplace is expected to increase as a result of economic constraints that are developing in many domestic markets.

Main Challenges

- lack of reliable and timely information on business climate and practices, regulatory framework, structure of existing services, competition, and nature and scope of emerging opportunities in foreign markets;
- limited exposure to international competition and foreign business practices;
- lack of specialization;
- relatively small companies with limited resources;
- lack of networking and alliances between firms, as well as between the public and private sectors;
- limited knowledge of federal and provincial assistance programs.

Strategic Direction

IFI expenditures in lower- and middle-income economies for health-care services point to significant opportunities for Canadian service providers, particularly in Latin America and the Caribbean. Additional opportunities also exist in Asia, Southeast Asia and Eastern Europe.

The focus on the developing world must be balanced against opportunities in the United States, in view of changes and adjustments taking place in the U.S. health-care system.

The federal government will facilitate the effective marketing of the sector by:

- making industry aware of IFI projects as a leading source of export opportunities and educating suppliers on business practices in IFIs;
- monitoring the evolution of IFI project proposals and the industry's collective experience in pursuing and bidding for these and private-sector opportunities in developing countries;

- organizing export promotion events and training to help firms learn how to penetrate foreign markets;
- advising on emerging opportunities and foreign business practices;
- encouraging the grouping of resources and non-competitive responses;
- investigating the potential for technology transfer and alliances to develop technology-based services such as telemedicine;
- stimulating collaboration between the public and private sectors;
- co-operating with provincial governments to ensure that firms enjoy timely support in pursuing opportunities.

References/Contacts

Health Industries Branch, Industry Canada, Ottawa [Tel: (613) 954-3077; Fax: (613) 952-4209] – For information on Canadian capabilities and for copies of electronic information products such as “INSIGHT Health,” “Medical Devices Strategic Alliance Opportunities,” “Medical Device Technology Opportunities.”

DFAIT InfoCentre, Ottawa [Tel: 1-800-267-8376 or (613) 944-4000; Fax: (613) 996-9709] – For geographic market studies and *Directory of the Canadian Trade Commissioner Service*, for inclusion on mailing list for *CanadExport*, and for other information on programs and services available to exporters.

Industry Canada Online (Industry Canada's Bulletin Board System, accessible by modem) [Tel: 1-800-507-7456 or (613) 943-1910] – For INSIGHT, dISTCoverY, sector-specific forums, sector profiles, press releases, ministerial speeches, publications, etc.

DFAIT's Information Bulletin Board [Tel: 1-800-628-1581 or (613) 944-1581 (requires modem to 14 000 baud, Line Setting N-8-1, ANSI/ACII Terminal Emulation)] – For geographic/sector market reports, information on programs, finance services, project information documents, IFIs, etc.

DFAIT, International Finance Division (TPF), Ottawa, [Tel: (613) 995-7251; Fax: (613) 943-1100] – For information on IFIs.

For information on IFI projects, see DFAIT's Information Bulletin Board or contact the following:

- For World Bank or Inter-American Development Bank: Office for Liaison with the International Financial Institutions (OLIFI), Canadian Embassy, Washington, D.C.
[Tel: (202) 682-7788; Fax: (202) 682-7789];
- For African Development Bank: OLIFI, Canadian Embassy, Abidjan, Ivory Coast
[Tel: (011-225) 21-20-09; Fax: (011-225) 22-05-30];
- For Caribbean Development Bank: OLIFI, Canadian Embassy, Bridgetown, Barbados
[Tel: (809) 429-3550; Fax: (809) 429-3780];
- For Asian Development Bank: OLIFI, Canadian Embassy, Manila, Philippines
[Tel: (011-632) 815-9536; Fax: (011-632) 810-5142];
- For European Bank for Reconstruction and Development (in London, England)
[Tel: (011-44-171) 338-6507; Fax: (011-44-171) 338-6062].

DFAIT, Investment Prospecting and Science and Technology Division (TIR), Ottawa
[Tel: (613) 992-5339; Fax: (613) 944-1574] – For information on strategic alliance and investment prospecting activities.

Health Canada, International Affairs Directorate, Ottawa [Tel: (613) 957-7288; Fax: (613) 952-7417] – For information on export capabilities and opportunities in the Canadian health-care system.

DFAIT, Trade Opportunities Division (TOS)
[Tel: (613) 996-7186; Fax: (613) 943-8820].

Internet: <http://hpb1.hwc.ca:8600> – For Canadian Suppliers of Health-care Services Database.

Canadian Commercial Corporation,
Business Development Division, Ottawa
[Tel: (613) 992-4398; Fax: (613) 995-2121].

ISO 9000 Hotline: Tel: 1-800-267-8220.

DFAIT's WIN Exports – Database of Canadian suppliers used by trade missions abroad and by DFAIT's International Business Opportunities Centre in Ottawa to source Canadian products and services; to register call (613) 996-5701 or contact the nearest International Trade Centre.

CIBS chapters on Bio-Industries (for further information relevant to diagnostics and biopharmaceuticals) and Information Technologies and Telecommunications (for further information relevant to health informatics).

MEDICAL AND HEALTH-CARE PRODUCTS AND SERVICES

Activity	Date	Location	Dept.	Contact
Africa and the Middle East				
Medical Sector Market Intelligence and Information Update	01-Apr-96	Johannesburg	DFAIT	613-944-6590
Medical and Health Mission from Jordan	01-Sep-96	Ottawa/Toronto/Montreal	DFAIT	613-944-5996
East Asia				
Medical Trade Show: Info Booth	10-Nov-96	Taipei	CTO/ Taipei	613-996-2807
Japan				
Pharmaceutical Investment Mission from Japan	01-May-96	Canada TBD	DFAIT	613-995-6634
Elderly Products Buyers' Mission from Japan	01-Sep-96	Canada TBD	DFAIT	613-996-2460
Medical Device Importers' and Distributors' Mission from Japan	01-Sep-96	Canada TBD	DFAIT	613-996-2460
Health-care and Rehabilitation Show: National Stand	22-Oct-96	Tokyo	DFAIT	613-996-2460
Multiple Markets				
International Financial Institution (IFI) Health Projects: Training Workshop	01-Apr-96	Canada TBD	DFAIT	613-996-7186
Pharmaceutical Research and Development Investment Partnering: Missions and Seminars	01-Apr-96	Multiple Markets TBD	DFAIT	613-995-6634
CD-ROM on the Canadian Medical Devices Industry	01-May-96	Ottawa TBD	DFAIT	613-992-5339
Health-care Mission from Central America	11-Nov-96	Montreal/Toronto	DFAIT	613-996-6129
United States				
Texas Medical Center and University of Texas Medical Branch: Mission to Canada	01-Apr-96	Canada TBD	DFAIT	613-944-9482
Bio-Pharmaceutical Industry Study: Strategic Partnering	01-Apr-96	Boston	DFAIT	613-944-9482
Laser Industry Initiative: Seminars	01-Apr-96	Los Angeles	DFAIT	613-944-9482
Medical Products Micro-Missions from the U.S.	01-Apr-96	Canada TBD	DFAIT	613-944-9482
National Institute of Health (NIH) Medical Technology Licensing: Seminar	01-Apr-96	Washington, D.C.	DFAIT	613-944-9482
Pharmaceutical Investment Mission and Seminars in the U.S.	01-Apr-96	U.S. TBD	DFAIT	613-995-6634
U.S. Health-care Supply and Services Newsletter: Publication	01-Apr-96	Chicago	DFAIT	613-944-9482
Canadian Medical Products Breakfast Seminars	01-May-96	San Jose Bay Area	DFAIT	613-944-9482
MEDEC Annual Meeting: Mission from the U.S.	01-May-96	Toronto	DFAIT	613-944-9482
Purchasing Managers' Mission from the U.S.	25-May-96	Toronto	DFAIT	613-944-9482

Note: Dates and locations are subject to change.

Activity	Date	Location	Dept.	Contact
Alternative Pharmaceuticals and Para-Medical Products Market Study for the South Central U.S.	01-Jun-96	Dallas	DFAIT	613-944-9482
Health-care Dealers and Distributors Market Study for the Southeastern U.S.	01-Jun-96	Atlanta	DFAIT	613-944-9482
Home Health-care Dealers: Market Study and Database for the South Central U.S.	01-Jun-96	Dallas	DFAIT	613-944-9482
Home Health Medical Devices Mission from the U.S.	01-Jun-96	Ontario/Quebec	DFAIT	613-944-9482
Medical Device Investment in Canada: Seminar	01-Jun-96	San Francisco	DFAIT	613-944-9482
Medical Equipment Industry Market Study	01-Jun-96	Buffalo/New York City	DFAIT	613-944-9482
Mid-Atlantic Health-care Show: NEBS Seminar	05-Aug-96	Atlantic City	DFAIT	613-944-9482
U.S. Health-care Partnering/Strategic Alliance Seminar	19-Aug-96	New York	DFAIT	613-944-9482
Health-care NEBS Mission to Massachusetts	01-Sep-96	Boston	DFAIT	613-944-9482
Medical Products New Exporters to Border States (NEBS) Mission to Illinois	01-Oct-96	Chicago	DFAIT	613-944-9482
Medical Products Exports to the U.S.: Seminars	03-Oct-96	Montreal/Quebec City	DFAIT	613-944-9482
Medical Products Representatives Mission from the U.S.	01-Nov-96	Toronto	DFAIT	613-944-9482
Health-care Services Market Study for the Southeastern U.S.	01-Feb-97	Atlanta	DFAIT	613-944-9482
New England Health-care Assembly: Mission	01-Mar-97	Boston	DFAIT	613-944-9482
Buyers' Mission from Western Pennsylvania	15-Mar-97	Toronto	DFAIT	613-944-9482
Western Europe and the European Union				
European Strategic Alliances Program for Medical Devices: Strategic Partnering	01-Apr-96	Western Europe	DFAIT	613-992-5339
European Strategic Alliances Program for Pharmaceuticals: Strategic Partnering and Investment	01-Apr-96	Western Europe	DFAIT	613-995-6634
Pharmaceutical R&D Investment Partnering Mission and Seminars	01-Apr-96	Western Europe TBD	DFAIT	613-995-6634
Hospital Medical Services Show: Info Booth	01-May-96	Bologna	DFAIT	613-995-1530
IFAS Medical Show in Switzerland: Info Booth	01-May-96	Zurich	DFAIT	613-996-1530
European Community Regulatory Requirements for Medical Devices and In Vitro Diagnostics: Export Training	01-Jun-96	Montreal/Toronto/ Vancouver/Calgary	IC	613-954-3068
Health-care Mission from Portugal	01-Sep-96	Quebec/Ontario	DFAIT	613-996-1530
MEDICA '96: Info Booth	01-Nov-96	Dusseldorf	DFAIT	613-995-8296
Medicine '96: Info Booth	01-Nov-96	Stockholm	DFAIT	613-996-1530
MEDICA: NEXOS Mission	22-Nov-96	Munich	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 GIBS 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-maeci.gc.ca>

Acronyms and initialisms used in Canada's international Business Strategy

(This list does not include sector-specific references)

		DATE DUE 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 business			International Standards Organization
BOOT	build, own/operate			International Trade Advisory Committee
BOSS	Business Opportunity System			International Trade Centre
CCC	Canadian Council			Ministry of Agriculture, Fisheries and Food of Quebec
CIBS	Canada's International Strategy			International development bank
CIDA	Canadian International Agency			International enterprise
CIS	Commonwealth			North American Free Trade Agreement
CSA	Canadian Standards Association			North Atlantic Treaty Organization
DFAIT	Department of International Affairs			International Research Council
DFO	Department of Fisheries and Aquaculture			Natural Resources Canada
DND	Department of National Defence			Natural Resources Canada — Canadian Forest Service
EC	Environment Canada			International Sector Team
EDC	Export Development Corporation			Organization for Economic Cooperation and Development
EU	European Union			
FITT	Forum for International Trade	CARR McLEAN	38-296	Program for Export Marketing Development
FORDQ	Federal Office of Regional Development — Quebec			
FSU	former Soviet Union	R&D		research and development
FTA	Canada-U.S. Free Trade Agreement	S&T		science and technology
GATT	General Agreement on Tariffs and Trade	SAGIT		Sectoral Advisory Group on International Trade
GDP	gross domestic product	SME		small and medium-sized enterprise
GNP	gross national product	UNEP		United Nations Environmental Program
HRDC	Human Resources Development Canada	WED		Western Economic Diversification
		WTO		World Trade Organization



Acronyms and in Business Strateg

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(This list does not include

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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