Report of the

Canadian Medical and Scientific Equipment Mission to Eastern Europe

February 21 to March 14, 1970

Department of Industry, Trade and Commerce
Ottawa, Canada

REPORT OF THE

CANADIAN MEDICAL AND SCIENTIFIC EQUIPMENT MISSION

TO EASTERN EUROPE

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PURPOSE OF THE MISSION

The principal objective of this mission was to promote Canada's design and manufacturing capabilities and discuss market prospects with the scientific and medical professions, scientific and medical educators, and scientific institutes and hospitals in Eastern Europe.

Mission members hoped to initiate sales in the countries visited and to investigate the possibilities of joint ventures, licensing and cross-licensing arrangements.

To achieve these objectives, mission members met government officials and representatives of state trading agencies, and presented technical seminars to members of the scientific and medical communities.

MEMBERSHIP OF THE MISSION

The mission comprised a representative group of Canadian businessmen who were well able to explain the latest technology, product design, and the benefits of using Canadian scientific and medical equipment and to actually demonstrate some of their products. Members were:

Dr. Phillip G. Hallof President McPhar Geophysics Limited Toronto, Ontario	geophysical equipment and systems
Ernest R. Semple Chief Engineer Simtec Industries Limited Montreal, Quebec	semiconductor radiation detectors, electronic equipment and systems, medical instrumentation and systems
Dr. Wallace B. Shute President Wallace Shute Enterprises Limited Ottawa, Ontario	parallel obstetrical forceps and three-way uterine cell collector for detection of cancer
John Sutcliffe President Guildline Instruments Limited Smiths Falls, Ontario	primary standards laboratory equipment
Alex Galia Director, European Operations Controlled Environments Limited Winnipeg, Manitoba	controlled environmental equipment, plant growth chambers
Reginald M. Watts Manager, Commercial Products Division Barringer Research Limited Toronto, Ontario	geophysical equipment and systems, oceanographic equipment, air pollution detection equipment and systems
Milan Stolarik Tourist, Hospital and Education Division Department of Industry, Trade and Commerce Ottawa, Ontario	Mission Secretary

MISSION ITINERARY

Prague, Czechoslovakia	February 21 to 25
Budapest, Hungary	February 25 to 28
Belgrade, Yugoslavia	February 28 to March 4
Bucharest, Romania	March 4 to 7
Vienna, Austria	March 7 to 10
Warsaw, Poland	March 10 to 14

The program in each country visited included meetings with the Chamber of Commerce, Ministry of Trade, appropriate State Trading Organizations, Professional Institutes and members of the scientific and medical profession who were invited to attend technical seminars given by the mission members.

We gratefully acknowledge the hard work and assistance provided by the Commercial Counsellors and their staff in arranging visits, seminars, local accommodation and receptions.

GENERAL FINDINGS

Summary

From the point of view of all members, the Medical and Scientific Equipment Mission to Eastern Europe was an unqualified success. Through the very successful technical seminar technique used, contact were established with the end-users of the products as well as with the appropriate officials of State Trading Organization, responsible for purchasing this type of equipment.

While there is a shortage of foreign exchange in all countries visited, sales prospects do exist in each of them, varying (as later described) in accordance with priorities established by these countries for research and development, geophysical exploration, etc. Unexpectedly, some sales were consumated immediately, and prospects for the medium term look good, even with the constraint of a shortage of Western currencies. In some cases, sales of equipment for use in third countries will result where Eastern European agencies will be working under contract.

1. The Eastern European Market

a) Description

The Canadian market is completely open for the overwhelming majority of imports; but in the Eastern European market, (with the exception of Yugoslavia), foreign trade is almost completely a state monopoly. This control over imports is achieved through channeling all purchases from abroad through a small number of state foreign trade enterprises, each of which has a monopoly over the import or export of a specified range of products. With a few exceptions, manufacturing enterprises are not permitted to deal

directly in foreign trade and individuals are also not permitted to import goods from abroad. While the end-users of products recommend items for purchase, the state trading enterprises still determine the sources of imports and these choices may reflect a variety of factors in addition to the commercial considerations. However, the end-user is becoming more and more influential in the sourcing process, and he is the key man to address, particularly from the technical point of view. This is true notwithstanding the fact that his hands are tied if there is no foreign exchange available, or if his government wishes to purchase equipment from one Western country as opposed to another, for reasons of its own.

In addition, the rigid system of state control over imports has enabled the Eastern European countries to restrict imports to those items considered essential by them for economic development. One of these is Western technology which all Eastern European countries are eager to acquire.

As it is more difficult for Canadian exporters to gain access for their goods to the Eastern European markets than vice versa, a planned and concentrated effort is required to sell there. To achieve a reasonable balance of trading opportunities in the negotiation of bilateral trade agreements with Eastern European countries, Canada has generally sought undertakings from them to purchase specified minimum quantities of Canadian goods in return for most-favoured-nation access to the Canadian market. Since this is one criteria the State Trading Organizations may consider when determining where to purchase equipment, signed agreements of this

nature could be an advantage to the Canadian exporter. This applies to Hungary and Romania specifically. Czechoslovakia and Poland received most-favoured-nation treatment based on a prewar Convention of Commerce and on common membership in GATT.

b) Size of the Market-Imports and their Value

All Eastern European countries are major importers of medical and scientific equipment, with total imports from the West of U.S. $76,900,000 during 1966, the latest year for which figures are available (Source-supplement to the World Trade Annual, 1966 Vol. 1). These do not include the figures for Yugoslavia which are not available.

While the figures are outdated, a significant market is evident. Assuming a growth rate of imports of 10% annually the market now should exceed $100 million--certainly one worth investigating by all Canadian firms in this field.

The major products being imported by these countries follow:

Electro-medical X-ray equipment	U. S. $3,258,000
X-ray apparatus	1,882,000
Electro-medical equipment	1,376,000
Medical instruments n.e.s.	2,876,000
Other medical instruments	2,437,000
Mechano-therapy apparatus	440,000
Hearing orthopaedic aids and hearing aids	197,000
Total medical equipment and instruments	U. S. $12,466,000

Electrical measuring and controlling equipment	U. S. $17,991,000
Electrical measuring and controlling equipment n.e.s.	17,755,000
Optical instruments	727,000
Optical instruments n.e.s.	120,000
Meters, counters, non-electric	1,836,000
Measuring controlling instruments	15,945,000
Technical models	632,000
Mechanical testing apparatus	1,066,000
Thermometers, hydrometers, etc.	534,000
Gas, liquid control instruments	3,551,000
Instruments, non-mechanical non-electric	2,272,000
Instrument parts and accessories	2,031,000
* Total scientific instruments and equipment	U. S. $64,460,000

Of this total market, Canada's share in 1968 was $152,000, an insignificant figure. It indicates very little penetration by Canadian firms and presumably a lack of interest in that market--something which this mission was intended to overcome. Judging by the mission's results, Canadian exports to Eastern Europe will increase substantially. The market is there, and even though it is a tough one to penetrate, the rewards are good if patience and perseverance are the guiding forces.

* See Appendix for breakdown of these figures by country, by class and by product.

2. Marketing Methods

Even though selling in Eastern Europe may be somewhat unorthodox compared with selling in the West, a good plan which follows a pattern not unlike any other marketing method has to be developed. Bearing in mind that contact must be established and maintained with the appropriate State Trading Organization, whether initially or as a second or third step, the following three possibilities exist:

a) Selling direct from Canada

b) Selling through a state-owned Agency

c) Selling through a Western European Agency

a) Selling direct from Canada

This method, unless undertaken with numerous personal visits to Eastern Europe in mind, is the poorest one to consider. The thing to remember is that you must visit if you want to sell, no matter what technique is used.

Direct selling appears at first to be an easy approach to this centralized market. After all, there is only one organization to deal with and if the requirement is there, orders should be forthcoming. In theory there is some logic in using this channel because the foreign trade company is supposed to serve as an information agent, passing brochures and prices to potential end-users in the country. In practice, many things inhibit this method. Communication by mail is slow and unreliable; letters may go unanswered and brochures be filed untranslated. The officials of foreign trade organizations are not, as a rule, experts in specific fields and may not understand

a product or its uses, resulting in information being passed to the wrong end-user, or being just forgotten. The amount of correspondence (brochures and prices) received by these state trading organizations is staggering and, unless there is something which catches an official's attention,or if he is not primed by a visit from the seller or agent,there is not much interest or desire to push a product. Furthermore, these officials spend more time away from their desks dealing with visiting businessmen than in handling correspondence, so it is easy to see where priorities are assigned. Direct selling is a poor method, and even though the odd sale may be made after a prolonged period of correspondence, it is not recommended for good results.

b) Selling through a State-owned Agency

This method is fairly new and unproven and so is not recommended at this time. Essentially it means using a state-owned agency, which undertakes to represent a firm and sell its products in one of the Eastern European countries for a commission of between 1 and 3%. All East Bloc countries have them and they were set up to take some business away from Western agents and to generate additional foreign currency.

While it is claimed repeatedly that this commission, because it is paid to a state-owned authority, is a determining factor in obtaining an order when prices offered by a number of competitors are equal, in practice this does not seem to be the case. It may become so in the future and this method should be kept in mind for use in the future. In addition, an agency will make hotel reserva-

tions, pick up visitors at the airport, translate during negotiations and, occasionally perform other services as requested, for its commission. However, as a state-owned organization, it cannot provide information about competition, priorities, availability of funds, etc. Thus it may be better to use these commission amounts as fees for persons who can provide some of this critical information.

c) Selling through a Western European Agency

Many European firms have developed, or have always had, a capability for handling sales to Eastern Europe. While these exist in countries such as Germany, Switzerland and Denmark, the best and most numerous are in Austria. As a matter of fact, Austria has become the focal point of selling to Eastern Europe and many West European firms have established branches there just for this purpose.

There are several reasons for this situation--Austria's very close proximity to the market, lower salaries of Austrian personnel than in other Western countries, and most important, old ties between Austria and the former states of the Austro-Hungarian empire which are being revived. The mentality of the Austrians is such that they can very easily adapt to the conditions in Eastern Europe and are able, therefore, to establish contacts quickly. Then, there is the matter of language. While Austrians may speak several languages, English included, it was quite clear to the mission that German is the language most easily understood and spoken by East European officials (particularly

by older officials who were taught German as a second language prior to the Second World War). English is a close second. In Romania French predominates with English being second. The language or communications capability favours the German-speaking Austrians.

The Austrian agent can perform all the functions normally expected of an agent. Add to this his additional expertise in dealing with the subtleties of trade with Eastern Europe and you have a medium recommended highly for penetration of this market.

Several good agents are known to the Canadian Government Trade Commissioner in Austria, and all companies should contact this office, as well as the Trade Commissioner's office in the Eastern European countries, before embarking on a sales campaign in Eastern Europe. These Canadian officials are there to help Canadian exporters and can perform many vital functions which will simplify the job, and in many cases, open doors that may otherwise be closed.

Not one of the methods a, b, and c will do the job by itself and, normally, a combination of methods is required. A personal visit is a must and it can also serve the purpose of determining the proper marketing mix to be used by various companies.

d) Techniques to Utilize in Selling

Assume that the basic work has been done and a decision made to visit the market. The best impact comes from appointments with individual officials. Failing that, the following techniques are recommended:

(i) Advertising in Technical Journals

In almost all East European countries there are technical journals which are eager to publish technical papers produced by Western firms. These are preferred reading for native specialists and end-users. Though it may be difficult for some firms to compile such papers for publication and have them translated into the local language, it is well worth the effort. Previous publication can help a visit, and subsequent publication can reinforce the favourable impressions of a visit.

(ii) Trade Fairs

Most East European countries have one large trade fair each year to accommodate every product. These fairs are extremely well attended by end-users and specialists and are an excellent point of contact. In many cases, business can be concluded during the fair for the equipment on display, particularly if interest in this equipment was previously shown. There are two good reasons for this situation--local authorities want the publicity for the fair that sales of this nature bring, and purchasers feel they can get a better price from the seller (displaying company) by saving on shipping costs, buying "used equipment," a quick sale, etc. Normally, there is ample room for negotiations and a good price can be obtained.

One thing militating against trade fairs is the high cost of participation compared with potential sales in the immediate future. However, this Department participates in numerous trade fairs in Eastern Europe every year, picking up a large portion of the costs of Canadian exhibitors. Canadian firms can utilize this vehicle by contacting the appropriate Trade Commissioner, the Tourist, Hospital and Education Division, or the Fairs and Missions Branch.

Periodically, trade missions such as this one are also sponsored and are an excellent way to penetrate the Eastern European market.

(iii) Technical Seminars

This technique is discussed in detail later as it was the major avenue used for penetrating the Eastern European market by the Medical and Scientific Equipment Mission.

No matter what method or technique is used, and this report may not be covering them all, knowledge of the market, its organization, patience and perseverance are the routes to success.

It should be noted that the above and forthcoming comments apply to all countries visited except Yugoslavia which has a somewhat different system that will be discussed later when each country is reviewed.

e) Approches to the Market

No matter what methods and techniques are used the following steps are part of a pattern in dealing with the Eastern European market:

(i) Let your interest in Eastern Europe be known to the appropriate Trade Commissioner or to this Division.

(ii) Send descriptive literature and prices to the Trade Commissioner or to this Division. You will be advised which State Trading Corporations to deal with. Write these agencies giving them all information required so that they have you registered and at least know of your existence.

(iii) Prepare for a subsequent visit to the market, ready to deal with the State Trading agencies directly, requesting that they have end-users present at meetings to evaluate your product and to make contact with them for subsequent efforts.

3. The Seminar Technique used by the Mission

Realizing the difficulty of the market, the import monopoly position of the State Trading Corporations and the need to contact end-users, this mission decided to use the technical seminar technique. It was properly developed before the mission left and consisted of-- appropriate technical topics reflecting the specialty of each member, concentration on the latest technology or processes developed, results of applying these technologies or processes to actual practical applications, results of these applications with improved methodology,

interpretation of results, improved accuracy, etc. The technical papers were sent to Canadian Trade Commissioners responsible for the various countries to be visited, for translation. Thus both summaries and copies of the papers were available for distribution in the local language when the mission arrived.

To supplement the seminar presentations, mission members brought along slides or photos which were used during the presentations and in most cases, samples of equipment which were either demonstrated or exhibited to interested end-users. Each presentation was translated simultaneously to the audience by technical interpreters and the seminars were not only understood by all present but were extremely successful.

A question period normally followed when specifics were covered, and in most cases mission members were asked to present seminars again to smaller audiences at universities, technical and research institutes (including high-security areas), hospitals and factories. There was also a great demand for technical and sales literature-which depleted supplies rapidly. Most important, all end-users were identified and appropriate material was given to them on the spot or mailed to them later.

In order to assure proper translations and good attendance at these seminars, use was made in most countries visited of local advertising agencies, such as RAPID in Czechoslovakia. The advertising agency was responsible for all translations, invitations to end-users to attend the seminars, obtaining a proper place for seminars to be held, all audio-visual equipment, interpreters, publicity material, a list of end-

users invited and in attendance, refreshments,and any difficulties that may have arisen before, during or after the presentations. These arrangements worked out extremely well in most cases. There were very few panics or last-minute difficulties. Naturally, there was a fee to the advertising agencies for this service, which surprisingly,varied considerably from country to country. It is safe to say that an individual company would be charged around $300 to $400 for the service, with a lot of room for negotiations.

The results of the seminars were extremely good. Attendance averaged 40 to 50 end-users and many contacts were made for further meetings the next day. The audience was greatly impressed with Canada's capabilities in the fields covered and,in many cases,genuinely surprised that Canada had highly advanced technological equipment and instruments to offer. In some cases, sales were almost consumated on the spot, even though the State Trading Corporations had to process the orders. In two or three working days, it was possible to meet the majority of the appropriate contacts in each country, thus achieving the objectives of the mission and individual participants.

While there are other market penetration techniques available for medical and scientific instruments and equipment, the best and most highly recommended is the technical seminar technique just described.

4. Sales Potential for Canadian Products

Even with the shortage of foreign exchange in all countries visited, the mission members found good sales prospects for medical and scientific equipment. Sales may not materialize immediately as everything has to fit into a plan and has to be budgeted for accordingly.

Nevertheless, mission members realized immediate sales or sales shortly after their return to Canada of $60,000, the bulk of which were in the geophysical equipment area. Conservative estimates by the members of sales in the next two-year period total $800,000 and these could easily double providing there is either more foreign exchange available, counterpart trading is instituted, contracts in third countries are obtained by the Eastern Europeans, medium-term financing is available, or if higher priorities are assigned to the medical and scientific areas. There are excellent indications that the last factor is coming true as industry there tries to modernize, improve productivity and efficiency and as the whole system is upgraded.

In other cases, members firmed up contract negotiations started prior to the mission. One member met for the first time the end-users and specifiers of its system and this meeting has since resulted in an order for $180,000 worth of equipment. This is a good illustration of how a personal visit considerably and positively influenced a sale to Eastern Europe. Another example cited by a company is that sales in 1969 doubled over those in 1968 as a result of a sales tour to this market in 1968. The company has mentioned that it planned to use one of the sales methods described--participating in the Bucharest Trade Fair in October, 1970, and sending all the equipment specified by two potential customers who felt reasonably sure that it will be purchased at the conclusion of the fair.

Other sales opportunities exist in Eastern Europe where financing is available from international agencies for work in those countries,

or where Eastern European specialists are performing work under contract in third countries. An example of the former is a United Nations program in Czechoslovakia to study and bring under control air pollution. This will require air pollution detection and control equipment which can be purchased abroad, where it is available, with hard currency from the UN. An example of the latter is where Eastern Europeans act either as expert advisers in third countries or where they have obtained a contract to complete a project, such as mineral exploration. Since they either specify or buy outright the equipment required for these purposes, good sales prospects exist. At the moment, Hungarian and Romanian experts are doing mineral exploration work in Kuwait, Nigeria and other developing countries in Africa and Asia, much of it financed by the UNDP (United Nations Development Program). As a matter of fact, a system for this type of work has already been bought from Canada as a result of this mission.

As a general observation, it was found that Eastern European scientists and professionals in these fields are well trained, sophisticated and fairly current in the state of the art. However, as a rule they lack modern, technologically advanced equipment and so do not have practical experience in performing their functions but rely more on sharpening their theoretical capabilities. This indicates again a strong demand for advanced scientific and medical equipment by end-users.

There was genuine admiration for Canada's capability to integrate a variety of instruments and peripheral equipment into a workable system,

utilizing state of the art technology and obtaining a high quality of data with good interpretation of data. This was very intriguing to the end-users, again stimulating tremendous interest in purchasing these types of systems.

To sum up, measuring, detecting and monitoring equipment and instruments of increasingly greater precision, accuracy, and ease of use are in demand and will continue to be in demand in Eastern Europe. A breakdown of imports to this market in this equipment area was given in General Findings 1(b), indicating in detailed figures the market for specific product areas.

While patience and perseverance are the main guides, the market is there for those who wish to get business. When orders are placed, full payment is promptly made, and subsequent orders are assured if the equipment purchased performs properly.

5. Current Suppliers--Competition

This report has addressed itself mainly to East-West trade and appropriately so, as this is of most interest and importance. Not to be neglected though is the fact that substantial internal trade exists between the Eastern European countries and the U.S.S.R. The dollar volume of this trade is not available.

Poland has a very good scientific and, to some extent, medical equipment and instrument industry. Czechoslovakia has a fine scientific industry (as has Hungary), as well as a good medical equipment industry. Naturally, the U.S.S.R. has a capability in all these areas.

It was ascertained that most of the basic requirements in the medical and scientific equipment areas are supplied through this internal

trade, which to a large extent makes sense. But there are big gaps in capabilities and these are filled by imports from the West. Furthermore, Eastern European and Russian equipment, while it may not be sophisticated, advanced, or accurate, has done the job to date, and will probably continue to do the job in the future. This is true except in areas where Western technology is a must, such as in plant and product modernization, exploration for natural resources that can become foreign exchange earners, where high accuracy and reliability are a must, and where high priorities exist in the various five-year plans. These requirements are being filled by aggressive marketers from Germany, England, France, and most recently from Japan. Interest in Canadian equipment is high but to date very little of it has found its way to Eastern Europe. This is mainly due to a lack of interest by Canadian manufacturers but also because of export restrictions and a lack of knowledge and feelings of uncertainty about that market and all its subtleties--feelings, which it is hoped this report will alleviate as far as Canadian exporters are concerned.

Germans are by far the most numerous salesmen in Eastern Europe. The mission met them in every capital and, according to various officials, they have penetrated this market very successfully. This was best illustrated by references to or comparisons with German equipment whenever the occasion arose and while Canadian equipment was being demonstrated or talked about. Since the Germans established themselves in this market some time ago, their equipment is best known. In many cases it acts as the reference point in comparison with other equipment, as a guide when specifications are written, and enjoys a

preferential position when new requirements are being filled or equipment is being replaced or re-ordered. They have learned their lessons well and continually sit on the doorsteps to pick up orders. The British and, to some extent, the French are also in evidence, having realized the importance of the market and wishing to get their share of it.

The most recent major arrivals have been the Japanese, who are penetrating successfully by their normal techniques -- a large, smiling and polite perseverance, use of all the marketing methods described and additional ones unique to the Japanese, as well as extremely competitive prices and good delivery schedules. However, it must be emphasized again that there is ample room for Canadian exports in this market; that end-users there are keenly interested in finding out more about Canadian capabilities in these fields. The major holdup is that Canadian firms are not sufficiently interested to take a serious look at the Eastern European market.

6. Availability of Funds; Counterpart Ventures.

a) Availability of Foreign Exchange, or rather the lack of it has been referred to repeatedly thus far and even though it is serious in all Eastern European countries, and it is being made abundantly clear that this is the situation, the matter must be kept in perspective and should not discourage potential exporters from seeking sales in Easturn Europe. A specific amount of foreign exchange is always available but is used judiciously by the countries visited. It is spent on items that have highest priorities in their respective five-year plans, with scientific equipment always, and medical equipment sometimes being included.

What the shortage of foreign exchange really means is that Eastern European countries cannot buy as much in the West as they would like to; and Western (including Canadian) companies cannot sell as much as they see a demand for. But the money is there and it needs to be matched with equipment that fits appropriate priorities; or purchases have to be deferred for a period of time and this requires patience and perseverance.

Canadian companies have several things working to their advantage, either directly or indirectly. These include the bilateral trade agreements signed by Canada with Hungary, Romania and Bulgaria which compel them to purchase specific negotiated amounts from Canada in exchange for receiving most-favoured-nation treatment in the Canadian market. Also, Canada has a negative balance of trade with several of the countries, including Poland and Czechoslovakia and even if no response is forthcoming when this fact is mentioned, it cannot have anything but a positive impact behind the scenes on potential sales from Canada. Then, of course, there are the natural advantages that Canadian companies enjoy elsewhere in the world, such as being the leaders in the design and manufacture of certain types of equipment, i.e., geophysical equipment; having in many cases unique equipment not elsewhere available, or equipment that is competitive and has better features than that of the competition; better delivery time, more reliability, ease of service and other factors. Another point: funds are available for purchase of equipment for work in third countries or for projects in Eastern Europe financed by the United Nations programs previously referred to.

Other sources or features that can be tapped follow.

b) Counterpart Trading is nothing new to the old hands dealing in Eastern European trade, but may be new to Canadian companies; it is worth exploring. Essentially, counterpart trading means that if a Canadian company can purchase for resale any of the products of an Eastern European country, the deal automatically ensures the sale of Canadian products in that country. Several opportunities for counterpart cooperation arose during the mission and these will be followed up by the mission members.

Since it was previously indicated that several of the countries have a scientific and medical equipment industry, and that they are vitally interested in exporting to the West, any Canadian company looking at trade with Eastern Europe should not only consider counterpart trading but should be prepared to discuss it.

There are numerous products available which, as they stand, could have acceptance in the West by virtue of their quality but particularly by virtue of their low price. There are other products which could be imported as sub-assemblies or as parts and be completed in Canada, ensuring that the finished product would have a North American appearance. Provided that the final selling price to the customer contained a specific percentage of Canadian content, the finished product would qualify for Commonwealth preferential tariffs, for waiver under the Buy American Act, etc., and for the Canadian market.

The importance of such purchases of Eastern European goods is that they can become a part of a counterpart agreement in which the exporting country agrees to purchase at least an equivalent value of goods from the

Canadian importing company. Under suitable conditions it has been established that in some cases the exporting country will buy twice the value or more in Canadian goods from the importer.

Counterpart trading is fairly clear-cut and an obviously excellent method of developing trade with Eastern Europe. There are more complicated methods or agreements which can be used and, though not readily applicable to scientific and medical equipment, they should at least be known. These are barter trade and switch deals. They are complicated because, in most cases, third parties have to be involved to complete the transaction. In barter trade, the goods (i.e. agricultural products) offered by Eastern European countries as partial or complete payment for equipment are completely unrelated to the specialty of the Canadian scientific or medical equipment manufacturer. The goods are sold to a third party for disposal to obtain hard currency as payment for the equipment sold. Specialists of this type exist in Austria and several other European countries. Switch banks that handle currency transactions exist only in Austria because that country has bilateral trade and payments agreement with several Eastern European countries. As an example, trade between Austria and Czechoslovakia should balance under the terms of the agreement but in practice it seldom does. Consequently, credit accumulates on one side or on the other. The unit for this trade imbalance is the clearing dollar and in the simplest terms, if one Eastern European country has a surplus of these clearing dollars, they can be used to buy goods from a third party, the hard currency in question being the Austrian schilling.

c) Licensing Agreements and Joint Ventures are eagerly sought by all Eastern European countries. These types of agreements have shown a dramatic rise over the past five years. They stem from economic reforms, from a desire to modernize and utilize the latest technological advances. Purchasing of technology is also associated with a desire to cut down on foreign currency expenditures.

Such agreements at times also involve joint marketing of the end products in third countries and offer possibly significant earnings of hard currency which will make it easier for Eastern Europeans to buy additional equipment from the Canadian seller. Thus this method is increasingly used by Western companies who find the road barred to direct sales. Agreements have been signed with numerous companies from Germany, France, Britain, Italy, Japan and Sweden, and recently with several Canadian companies, specifically in X-ray equipment and surgical clips. Approaches were made to several of the mission members for licensing agreements and these are being considered.

There are several types of agreement, but most stipulate a direct payment of funds in return for drawings and other data required to tool up for production. Some agreements include royalty payments on each item produced, and others call for payment of a lump sum to cover a specified period of time. Market areas and similar considerations are always well specified and frequently are the cause of protracted negotiations, since the enterprise in question invariably wants the opportunity to export to certain convertible currency areas. The Eastern Europeans are very shrewd and persistent negotiators and Canadian

companies should bear this in mind and act accordingly. But once everything is spelled out by both sides, the Eastern Europeans stick to their responsibilities very conscientiously.

As with all foreign trade, the sale and purchase of licences falls within the competence of a foreign trade company (except in Yugoslavia) with exclusive powers to negotiate the commercial terms of these transactions...Something to think of in appropriate cases.

One interesting aspect uncovered by the mission is the area of joint ventures or selling of services by each side. For example, in the area of mineral or oil exploration, certain Eastern European countries have contracts in third countries. While they can purchase the required equipment and utilize their professional capabilities, which are good, to complete the job, they realize that in some areas newly developed data gathering and interpretation techniques developed in Canada can markedly improve the end results and speed up as well as simplify the job. Thus negotiations are being carried out for joint co-operation in these instances. Another matter pertaining strictly to buying a service is being negotiated to perform a specific portion of an oil exploration program in Eastern Europe. Rather than purchase all the equipment and develop the techniques required, they buy a service contract for this purpose, as it is cheaper, faster and usually more reliable. On the other hand, Eastern European geologists and geophysicists lack practical field experience in exploration techniques which they require to complement their excellent theoretical capabilities, so they offer the services of their experts on a contract basis to

Canadian firms who are doing exploration work all over the world, and who find it hard to recruit crews to perform these jobs. Some agreements are likely in this area as well.

While the above examples are in an area that lends itself nicely to these types of agreements, other imaginative Canadian companies in the scientific and medical equipment fields should be able to utilize this approach.

7. Recapitulation

Hopefully, this report will achieve its purpose of describing and exploring the Eastern European market--how the various economies function, the type of trading systems, method to use for penetration and associated techniques, prospects for sale of Canadian scientific equipment, systems, technology and services.

It is a tough market with many difficulties to overcome. But the unqualified success of this mission shows that the interested and well-prepared Canadian exporter can reap substantial benefits from this market which has been overlooked for too long. The market is particularly attractive for the long term as it is just opening and many excellent opportunities are yet to be uncovered. Economic reforms are opening doors to us and there is also the likelihood of repeat business when once established. Add to these inducements a strong recommendation from the whole mission to not only think about the market, but also to actively commence penetrating it now!

CZECHOSLOVAKIA

Area: 49,367 square miles

Population: 14.4 million (1967)

Total imports of scientific and medical equipment: U.S.$21.4 million (1966)

General Information

Economically, Czechoslovakia in 1970 is back to "The Plan," which has assumed once more major importance in directing the economy. After a few years of revised economic thinking during which enterprise managers were given a large degree of latitude in running their operations, the Party and the Government have reintroduced centralized control by subjecting industrial and other producers to binding plans. However, they have not returned to the rigid production norms of the early 60's and many features of the abortive economic reforms have been scrapped.

The country suffered serious economic difficulties in 1969 and the Government's answer has been to strengthen the role of the central planners. Pending the announcement of the Fifth Five Year Plan, binding plans have been developed by central organs for all significant industries, including those involved in foreign trade.

Notwithstanding its difficulties, Czechoslovakia increased its exports to the West by 14% in 1969 while imports increased by only 6% in that year, thus achieving a respectable level of trade growth. Canadian exports to this country in 1969 were $3.8 million, the lowest figure in a decade, while Czechoslovakia exported to Canada $10 million worth of goods, showing a nice trade surplus with us.

Due to this surplus in their favour and with the completion of the credit payment for wheat, funds available for purchases from Canada should rise sharply. However, it is and will continue to be important that Canadian exporters offer flexible payment terms, including credit, counterpart trading and to a minor extent the previously described barter and switch deals where major expenditures are involved. Statistics indicate that almost no Canadian sales of scientific and medical equipment were transacted in the past. The time is ripe to try.

More specifically, the quality of scientific and medical research is of a high level and the country is advanced in integrating the results of basic research into industry. Research is developed and programmed by the Czechoslovak Academy of Science; funding and allocation is coordinated by the Federal Committee for Technology. Much of the applied work is done by universities; other work is done by research laboratories and manufacturing enterprises. As an example of the first: the Institute of Applied Geophysics is located in the Charles University in Prague and has a branch at the University of Brno. The actual exploration work is also done by these bodies and the end-users are, therefore, easy to identify and meet.

Mission Program, Observations and Comments

The mission commenced its tour in Czechoslovakia and a pattern of appointments and visits was established that held true for all the other countries visited, and is worth describing.

On the first day in Prague a courtesy call was made to the Czechoslovak Chamber of Commerce to review the pattern of trade between the two countries, particularly in medical and scientific equipment; to discuss methods of

cooperation and trade in these areas; and to determine, to some extent, the present economic thinking, priorities, availability of funds, etc. (In some countries a courtesy call was also made to the Ministry of Foreign Trade where similar topics were discussed and it was impressed upon both bodies that Canada is interested in sales to their countries, and that we have specific capabilities to offer.)

Visits were made to the appropriate State Trading Companies before or after the seminars (which were the main activity in each country). In Czechoslovakia there is only one body responsible for this area, namely, KOVO. The mission received a good hearing from the top officials of this organization to the working level officials who have responsibility for specific product lines. The organization structure consists of several departments with appropriate responsibilities and is not unlike the organization of the Department of Industry, Trade and Commerce.

It became quite clear that KOVO and a parallel organization, POLYTECHNA, which specializes in the licensing of all products for both import and export, serve almost entirely in an administrative capacity. They have looked for some time now to the end-users of scientific and medical equipment to specify performance criteria and source of imported equipment.

The end-users then, are the major target. The mission came prepared to meet them and talked to them via the technical seminar technique.

The seminars were organized under the close supervision of the Canadian Trade Commissioner by RAPID, one of the leading Czechoslovak

advertising agencies. The agency did a very professional job (at a fee) and prepared and sent our invitations in the name of our Trade Commissioner to end-users to attend the seminars, including the program symposia, description of the Canadian companies giving the seminars and their product lines, as well as a self-addressed reply card to monitor the attendance. The lists of end-users were developed by the agency and involved people from all over the country, some of whom travelled substantial distances to attend the seminars. To make sure that as many as possible attended and to keep their records straight, the agency sent out telegrams a few days before the seminars to people who didn't reply, thus completing their very thorough and professional duties.

Furthermore the agency was required to translate the technical papers being given, along with summary, and to engage interpreters. An outstanding job was done of interpreting, in most cases simultaneously, the presentations given by the mission members.

The seminars were held at the "House of Culture" and in several rooms at the same time, enabling presentations to be completed in one day. The agency had two people in attendance full-time to look after last-minute requirements and to monitor all activities, including the preparation of a list of all the end-users present and their addresses which were then turned over to the appropriate mission member for his use and follow-up. Naturally the agency ensured that all audio-visual equipment and operators required were available. Light refreshments were served. This appears to be a must as the Czechoslovaks are very hospitable people, as are all other Eastern Europeans.

The very successful presentations were followed by demonstrations of equipment and as many individual discussions as possible. All discussions resulted in invitations to repeat the seminar presentation at an institute, hospital, laboratory or plant, or to participate in further discussions the following day. The rapport with end-users was strengthened and their specific requirements discussed, which was not really possible previously.

As a result, each mission member ascertained what requirements existed and what his chances were for supplying equipment. There was a demand for several geophysical instruments of an advanced nature for use in Czechoslovakia, even though there is no major exploration going on as the country is old and has already been well surveyed. But the Czechoslovaks feel there needs to be further exploration with the latest and most sensitive equipment.

Requirements also exist for metrology, nucleonic research, and medical equipment and instruments, and air pollution detection equipment, the latter for a UNDP project. While the above requirements pertain directly to products available from mission members, it is safe to conclude that other Canadian manufacturers of scientific and medical equipment that have related equipment or other new, unique, technologically advanced equipment will find a market in Czechoslovakia.

One adverse comment is that the Czechoslovak economy is experiencing difficulties, and even though end-users send requests to KOVO almost immediately for certain purchases, there will be at least a six-month to a year delay before orders are placed. Priorities have to be examined and the appropriate foreign exchange released. The situation however,

should improve in the future and Czechoslovakia must be considered as a good potential market for scientific and medical equipment.

An additional matter of interest was the appearance of ZENIT, the first state-owned Eastern European agency soliciting business. The agency representative talked with and offered its services to all mission members. Its aims:

(i) Determine what products are required in Czechoslovakia

(ii) Supply technical information and establish and carry on technical and engineering services for the discharge of the commercial representation

(iii) Maintain a stock of spare parts for products imported to Czechoslovakia

(iv) Provide aid in training Czechoslovak personnel

(v) Plan and arrange publicity campaigns, translations, direct mailing campaigns, etc.

(vi) Represent firms and their products in exhibitions and trade fairs

The mission members, after careful consideration, decided not to employ this service, basically because it had not proven itself yet, and because being a state-owned agency, it cannot provide information about competition, priorities, availability of funds and the fees can be used to obtain this information from other sources.

One last significant point to remember is that Czechoslovakia became officially a Federal State comprising the Czech and Slovak Republics in 1969. Thus, Slovakia will soon have its own funds, agencies and end-users of interest to Canadian exporters and these will be centered in Bratislava, the capital of Slovakia. In the future, a

visit to Prague will no longer cover the whole country and a visit to Bratislava should also be considered a must.

In summary, the mission members recognize the potential market in Czechoslovakia. Geographically, it is the easiest Eastern European country to reach which makes sales and service relatively easy to follow-up. The Czechoslovaks are open-minded and good potential customers of Canada. At present, they have strong trade relations with Western Europe, more from tradition than for any other reason, and simply because of a lack of interest and effort on the part of Canadian companies.

List of major contacts in Czechoslovakia

KOVO, Foreign Trade Corporation Dukelskych Hrdinu 47 Prague 7	Responsible for import and export of all medical, scientific and electronic products.
POLYTECHNICA, Technical Co-operation Agency Vaclavske nam. 8 Prague 1	Responsible for licensing of all products for import and export.
RAPID, Czechoslovak Advertising Agency ul. 28 RIJNA 13 Prague 1	Advertising agency at the disposal of Western firms.
ZENIT, Foreign Trade Agencies Association Letenska Prague 1 - Mala Strana	An organization wishing to represent foreign firms.

Ministry of Foreign Trade
Trida Politickych Veznu 20
Prague 1

Chamber of Commerce of Czechoslovakia
13 Ulice 28 Rijna
Prague 1

Available upon request are lists of end-users who attended the seminars given by the mission members.

Write for this and any other information to:

Chief
Tourist, Hospital and Education Division
Department of Industry, Trade and Commerce
Ottawa 4, Canada

HUNGARY

Area: 35,918 square miles

Population: 10.2 million (1968)

Total imports of medical and scientific equipment: U.S.$14.6 million (1966)

General Information

The Hungarian economy is relatively healthy and made good progress in 1969. Foreign trade increased substantially and further expansion in industrial production will stimulate corresponding increases in trade with the West in 1970.

It has been two years since the introduction of Hungary's New Economic Mechanism, which involves the decentralization of management and the application of certain features of a market economy. There is general satisfaction with the new system and, although it is not yet operating fully, Hungarian authorities appear to be applying it on an ever-widening scale in industry and in trading operations. Buyer and seller relationships are being established between enterprises, a three-tiered price system has been introduced and some prices "decontrolled." The number of enterprises (including industries and end-users) allowed to engage in foreign trade has increased to approximately 100 and those industries which do not yet have foreign trading rights themselves are becoming more directly involved in the selection of foreign sources of supply. During the visit of this mission in March 1970, all import purchasing of scientific equipment was still in the hands of the Foreign State Trading Corporations; the mechanism had not yet reached this aspect of their operation.

Hungary increased its exports to the West by 30 per cent in 1969, achieving one of the best balance of payment positions in many years and fulfilling one of the goals of the new mechanism. On the other hand, imports from the West increased by 18 per cent, indicating an excellent situation for the sale of Canadian products at competitive prices.

Canadian-Hungarian trade and trade relations continued to develop favourably in 1969, following the renewal of the trade agreement in 1968, which provides for Hungarian purchases of not less than $15 million worth of Canadian goods over the subsequent three-year period.

Canadian sales to Hungary during 1969 stood at only $2.9 million, composed mainly of industrial materials, while Hungarian enterprises sold $9.2 million worth of goods to Canada. This favourable balance of trade with Canada, along with having to fulfill the conditions of the trade agreement, makes Hungary an excellent market for scientific and to some extent medical equipment and instruments.

Mission Program, Observations and Comments

The program in Hungary followed the established pattern. However, the Hungarian Chamber of Commerce was extensively involved with the preparation of the mission's program in that country--for which many thanks are extended. The Chamber briefed the members extensively about the economy and the new decentralization program; undertook to organize appointments with the appropriate state trading organization and Hungarian manufacturing enterprises; and coordinated the seminar program with METESZ. There is no Canadian Trade Commissioner resident in Hungary and commercial matters are looked after by the office in Austria.

There are several state trading organizations responsible for the type of equipment represented on the mission and appointments were arranged for visits to all of them, named below.

(i) METRIMPEX - The Hungarian trading company for instruments, including nucleonic instruments, laboratory instruments and equipment, material testing instruments and scientific glassware. This is the major company for import of instruments and the most important to contact.

(ii) AKADIMPORT - Supply service for research of the Hungarian Academy of Sciences. Responsible for imports of scientific equipment among other things, and was most interested in nuclear detectors of one of the mission members.

(iii) CHEMOKOMPLEX - Hungarian trading company for machines and equipment for the chemical industry. Responsible for some prospecting equipment (geophysical) and to some extent air pollution detection equipment.

(iv) TRANSELEKTRO - Hungarian trading company for electrical equipment and supplies which includes agricultural research equipment (plant growth chambers) represented on the mission.

METRIMPEX is the most important in the scientific instrumentation area as it has the widest responsibilities. The others however, have their own specific areas of responsibility and they must be contacted

before business can be transacted in those areas, no matter how difficult it is to identify the organization's particular responsibilities. It is very important to identify responsibilities and this is best done by utilizing the services of the Hungarian Chamber of Commerce, which is only too pleased to assist Canadian firms. It is to be emphasized once again that even though contact must be made with the appropriate state trading organizations and maintained, more and more decentralization is increasing the importance of the end-user and of the manufacturing enterprises who specify equipment to be bought.

As a matter of fact, several manufacturing enterprises in Hungary under the decentralization policy, have already obtained the right to export their products and to import related equipment for use in Hungary. These are discussed next.

(i) MEDICOR WORKS

MEDICOR manufactures and exports a line of medical, hospital and dental equipment and instruments and imports what it does not manufacture in this line.

MEDICOR is an excellent example of the new economic mechanism (decentralization) where a manufacturing enterprise has the overall responsibility of exports and imports and has to show results. It is a well-run and aggressive operation, very much interested in licensing agreements, joint ventures, and counterpart trading. MEDICOR is in the final stages of negotiations with two Canadian companies to manufacture Canadian products in Hungary under licence.

MEDICOR also designs and installs complete hospitals and sanitary units in Hungary and in any other country where it can get business. It is looking for equipment to complete its line and for joint-venture partners in third countries. Mr. I. Martos, Deputy General Manager of MEDICOR, visited Canada shortly after the mission was in Hungary to look for equipment required in several hospital projects in which MEDICOR is involved. The products included institutional equipment (commercial cooking equipment, laundry equipment, catering equipment) and several items of medical monitoring and examination equipment. MEDICOR was also interested in several of the products represented on the mission.

(ii) GANZ Measuring Instrument Works

This well-known manufacturing enterprise which makes a great variety of measuring instruments, industrial instruments, laboratory instruments, meters, etc., has the right to export its products, but not yet the responsibility for imports. Nevertheless, it is the expert who specifies and/or reviews most of the imports in this area now handled by METRIMPEX.

GANZ WORKS was mainly interested in Canadian electrical, metrology, and standards equipments which are, technologically, considerably in advance of those of most of the countries visited, and sales are fairly sure to result. Naturally, interest in counterpart trading was also expressed and is being considered.

Until the new economic mechanism is completely implemented, care should be taken to deal with the appropriate agencies along with the manufacturing enterprises to achieve penetration. These various responsibilities should be well researched before visiting Hungary. The Canadian Government Trade Commissioner in Austria is at your service.

The major activities in Hungary were once more the technical seminars given by mission members and these were somewhat different in organization and presentation. They were organized with the excellent assistance of METESZ, the Hungarian Federation of Scientific and Technical Associations, and held in the METESZ headquarters. The services performed were identical to those of the advertising agency in Czechoslovakia, but the authority and responsibilities were different.

One major innovation was that each seminar had a chairman who was normally a respected and senior expert or specialist in his field; in many cases he was a professor who not only lent prestige to the gathering but also led in questioning and in analyzing the presentations. In some cases, the chairman also acted as the interpreter, but in most, technical interpreters performed this function.

With the assistance of each chairman, the Chamber of Commerce and METESZ as well as the end-users present, several additional appointments were made to see appropriate people the following day. This resulted in almost complete coverage of end-users, agencies, institutes and manufacturing works in Hungary during the period of the

visit. As a result, excellent prospects were uncovered for Canadian metrology and standards equipment, negotiations were continued on a $500,000 phytotron with the Hungarian Ministry of Agriculture, and good prospects exist for medical and hospital equipment and instruments but particularly via the licensing agreement and in the area of joint ventures. Also of interest in the medium term was air pollution detection equipment.

Hungary does not have much favourable terrain for mineral exploration but does have a very sophisticated petroleum exploration industry (seismic and gravity). Some sales will definitely result in this area but the best prospects lie in selling equipment for use in third countries. The Hungarians have always been in the forefront in the area of gravity measurements and presently have a seismologist of world renown. As a result they have been asked by several developing countries to supervise mineral exploration projects using UNDP or local funds. This has already resulted in the sale of an induced polarization unit to the Geological Survey in Nigeria which was recommended and will be used by a Hungarian geophysicist contacted in Budapest. This method speaks for itself.

Hungary, with a growing economy, healthy balance of trade and the new economic mechanism in progress offers excellent potential for appropriate Canadian scientific and medical equipment.

A good look and proper market research will result in surprisingly good returns.

List of major contacts in Hungary

METRIMPEX Munnich Ferenc utca 21 Budapest V	Hungarian trading company for instruments.
AKADIMPORT Orszaphaz utca 30 Budapest I	Supply service for research of the Hungarian Academy of Sciences.
CHEMOKOMPLEX Nepkoztarsasag utja 64 Budapest VI	Hungarian trading company of machines and equipment for the chemical industry.
TRANSELEKTRO Munnich Ferenc utca 13 Budapest V	Hungarian trading company for electrical equipment and supplies.
MEDICOR WORKS Vaci ut 48/e-f Budapest VIII	Manufacturer, exporter and importer of medical, hospital and dental equipment and instruments.
GANZ MEASURING INSTRUMENTS WORKS Oktober 7 utca 7 Budapest V	Manufacturer and exporter of electrical measuring, industrial, precision and laboratory instruments, meters, switches, etc,
GAMMA WORKS Fehervari ut 85 Budapest XI	Manufacturer and exporter of nuclear instruments and scintillators, geophysical instruments and equipment, complete laboratories, etc.
Hungarian Chamber of Commerce Rosenberg hp.-ul7 Budapest V	
Ministry of Foreign Trade Honwed utca Budapest V	
METESZ Szabadzagter utca 17 Budapest V	The Hungarian Federation of Scientific and Technical Association. The agency which organized and helped to implement the seminar program.

YUGOSLAVIA

Area: 98,766 square miles

Population: 20,000,000 (1967)

Imports of medical and scientific equipment statistics: Not available

General Information

Politically and economically Yugoslavia is a socialist state, but unlike its Eastern European neighbors, it does not conduct its trade through state agencies, but rather through enterprises similar to those found in Western Europe. Although it is possible and desirable to sell most major commodities to the end-user, all foreign trade eventually passes through the hands of one or other of the more than 300 export-import and representative enterprises, including purchases by the State itself. These socially-owned organizations are competent in their own selected fields and compete vigorously with each other for their share of the rapidly expanding market. Nevertheless, virtually all business organizations are operated on a monopolistic basis with a state charter to perform certain functions in certain specific areas.

Expansion is based on two main factors, the country's ambition to develop and modernize its primary and secondary manufacturing sectors, and the ever-increasing demand from the general public for consumer goods.

Yugoslavia has been and still is emphasizing a decentralization of management from the federal level to the republican level due to political and economic reasons. The country is a mixture of nationalities,

languages, customs, and religions in one federal state with the following aspect to be noted:

One country - Yugoslavia

Two alphabets - Cyrillic and Latin

Three religions - Orthodox, Catholic, Moslem

Four languages - Serbian, Croatian, Slovenian, Macedonian, in that order of use.

Five nationalities - Serbian, Croatian, Slovenian, Macedonian, and Montenegrin

Six republics - Serbia, Croatia, Slovenia, Montenegro, and Bosnia-Herzegovina

The Yugoslav economy is relatively healthy and growing. Trade with the West has been increasing substantially, but imports exceed exports by a considerable amount (U.S.$536 million in 1968). This was offset to quite an extent by invisible earnings, such as tourism and the wages sent home by Yugoslav workers in the West. These, combined with other invisible earnings, larger domestic manufacturing capabilities to offset imports, an increase in exports and foreign investment, should make possible a surplus on international payments in the near future.

Canada's exports to Yugoslavia in 1968 amounted to $6.5 million, consisting mainly of raw materials, while imports were $4.7 million.

Scientific activity is organized into an institute structure. The institutes generally are related to universities or industrial enterprises. Funding may come from the federal government, the republic governments, or from the enterprises, reflecting the decentralization process and the federal structure of the country (not unlike the structure in Canada with its division of responsibilities at various levels).

The Federal Council of the Co-ordination of Scientific Activities a body of the executive branch of government, is charged with allocating federal scientific funds. There are seven universities and some 500 institutes chartered for research and development in science and technology, but many are small organizations for which import funds are rarely allocated. Perhaps only two dozen or so of the leading ones are actually given money to purchase equipment from the West.

The total research and development budget for the most recent year is about $90 million-- split 20% to the federal government, 20% to the republic governments, and 60% to the industrial enterprises.

The high percentage of funding from industry shows that emphasis is on applied technology, and that the enterprises have a responsible and autonomous position.

Importation of scientific and medical equipment into Yugoslavia is the function of trading companies, a cross between the export-import houses of Western Europe and the state-owned enterprises of the other socialist countries. These enterprises are permitted to act as agents, directly representing foreign firms in Yugoslavia. Although several do compete with each other in fringe product areas, they generally require exclusive agent arrangements with foreign companies and will not accept any account which is competitive with an existing one.

While most of their foreign accounts are West European and Japanese, representatives of the principal scientific and medical equipment importers openly stated that they wished to represent Canadian firms, if more Canadian firms would consider the Yugoslav market. There

are several trading companies dealing in scientific equipment--such as YUGOLABORATORIA, YUGOLEK and YUGOHENNIA, with FABEG dealing in medical and hospital equipment and supplies.

There is a fledgling instrument industry in Yugoslavia mainly intended to fulfill the basic and routine needs of domestic users. The largest of these are located in the Slovenian republic, which is also the centre of much of Yugoslavia's research and development activities. A trip to Zagreb and Ljubljana is of major importance for Canadian exporters considering the Yugoslav market.

Doing business in Yugoslavia has its problems, which relate mainly to business problems encountered in all markets--revolving principally around the extension of credit, sales and services follow-up, availability of spare parts, and training of technicians who will use the equipment.

The future looks very promising for Canadian companies wishing to do business in Yugoslavia. The market is open to competitive products, the interest is there, and funds are available much more readily than in the other Eastern European countries. The amounts may vary from year to year, but the fact remains that Yugoslavia will continue to need more scientific laboratory and medical equipment and instruments as its economy and standard of living expands.

Mission Program, Observations and Comments

The nature of the Yugoslav market with its decentralized decision making and purchasing systems was a blessing on the one hand, but a real organization problem on the other.

Once again the focal points of the program were the technical seminars. These were planned and organized entirely by our Trade

Commissioner as no agency was available to perform the complete function. They were held in a central location in Belgrade with complete audio-visual facilities. Only one interpreter was hired to handle all the presentations and they were tightly spaced and completed in half a day due to budgetary constraints. The attendance at the seminars varied from 12 to 60 people.

While, in general the seminars were not well attended in Yugoslavia, they did achieve their purpose; mission members met the seriously interested end-users and arranged meetings with them and their colleagues at institutes, agencies and manufacturing enterprises.

This experience indicated to the mission that the seminar technique did not have the impact it had in the other countries visited. The obvious reason was the decentralized system in Yugoslavia, with many of the end-users residing in Slovenia (Zagreb and Ljubljana) and other parts of the country, who could not or did not attend for a variety of reasons. The answer, on hindsight, should have been a decentralization of our seminars to keep pace with their system, and seminars should have been held where the end-users were. Since a tight schedule was being followed, time did not permit visits to cities other than Belgrade. This is now acknowledged as a mistake. In any future visits it is highly recommended that side trips be taken, at least to Zagreb and Ljubljana where the major scientific and medical activities are performed.

Nevertheless, the visit to Yugoslavia was very successful and it proved to have the best sales potential for the products represented by all mission members, as well as for other Canadian medical and scientific equipment.

Specific requirements exist for metrology and laboratory standards equipment at the Yugoslav National Standards Laboratories. Tremendous interest was shown in plant growth chambers and an immediate requirement exists at the Plant Protection Institute and the Institute of Wood Industry. The market for the latter type of equipment is wide open, and even though there is some shortage of funds, agricultural development, particularly agricultural research has a high priority. It is estimated that total Yugoslav requirements for plant growth chambers in the immediate future are in the order of $500,000.

The geophysical seminars were fairly well attended by experts and end-users from the whole country. There is good mineralization in Yugoslavia, with many mines in operation, and the industry is completely decentralized. Recently large bodies of valuable minerals were located. They are excellent foreign exchange earners and the Yugoslavs are very eager to carry out extensive mineral surveys of the whole country; thus, potential for geophysical equipment and systems is excellent. Several exploration companies spoke at length with mission members and requested firm quotations on complete airborne units valued up to $250,000, and other equipment. Since the mining industry and mineral exploration have almost the highest priority in Yugoslavia, money is available and sales from Canada are sure to result. Excellent opportunities exist for all types of exploration equipment including I.P. systems, gravity meters, portable radiometric devices, seismic equipment, magnetometers of all types, etc. Oceanographic equipment and instruments were also of interest to the Yugoslavs who are just starting to do work

in this area. While the immediate demand is relatively small, the future looks very promising for companies who manufacture this type of equipment (particularly for off-shore oil exploration).

Air pollution was not of major concern to the Yugoslavs at this time and their techniques for measuring it were rather old and inaccurate. However, pending legislation should be passed in the near future and a good market should exist.

Yugoslavia has an active nuclear research program. While the high-level contacts in this field are in Belgrade, the laboratories are situated throughout the country. Two accelerators are in operation and they have requirements for detectors and some of the associated electronics.

Substantial interest was shown and good potential also exists for medical equipment and instruments such as artificial kidney systems, brain scan detector systems, monitoring equipment, forceps, artificial limbs, and orthopaedic equipment.

Due to the decentralized nature of operations, mission members dealt almost exclusively with end-users. Since the end-users can purchase equipment directly and have the required funds to do so, no major effort was made to visit and negotiate agency agreements with Yugoslav import-export companies. It was felt that immediate requirements can be handled directly from Canada and that agents in Yugoslavia need not be involved at the present. As previously indicated, most purchases from abroad eventually do go through the import-export companies, but these are easy to find and sign up, in many cases on the recommendation of the end-users.

Nevertheless, several agencies were visited and their operations fell into two categories. The best and most appealing were those who act as exclusive agents for a product line and do not handle competitive products. These are the ones which should be considered by Canadian companies. The others are, in essence, order takers; that is, they get competitive bids from various companies abroad, present the best one (in price and quality) to the end-user, and ask for a commission of the same percentage value as the former (without offering the same type of service). It was not quite clear to the mission members why the latter came into existence or how they manage to continue their operations. Obviously they fit into the trading pattern and do fulfill a role in the Yugoslav system and should not be completely disregarded.

As in other countries, opportunities exist in the areas of licensing agreements, joint ventures and investment. The Yugoslavs are very active in third countries and have won major contracts abroad against international competition. They do need and are looking for partners in joint ventures.

Since Yugoslavia is an open country with a completely decentralized trading system, with business information freely available and with several hundred agencies looking for business as agents of Western firms, no complete list is available.

List of major contacts in Yugoslavia

Canadian companies wishing to find representatives in Yugoslavia are asked to contact the Canadian Government Trade Commissioner there, who will provide the names of agencies which are experienced in specific product lines. A list of end-users attending the seminars is available upon request.

ROMANIA

Area: 91,587 square miles

Population: 19.3 million (1967)

Total imports of medical and scientific equipment: U.S.$15.6 million (1966)

General Information

Romania continues its rapid economic development and prospects look promising as it approaches the end of its current Five Year Plan. A good deal of the recent industrialization has been based on imported equipment and technology. The country is also continuing its drive for expanded political, economic and scientific relations with all countries. Foreign trade continues to receive considerable attention and gives opportunities that attract large numbers of Western businessmen.

Of all countries visited, Romania was the most centralized and its planning Ministries and State Trading Organizations were the most powerful. Present economic problems revolve around the centralization question, and the country is beginning to realize the need to make the inter-relationships between government, production, management, and foreign trade more flexible and efficient.

With the usual East European caution, the Romanians are striving to correct these shortcomings in their recent economic reforms. The first part of the reform was the division of industries into some 200 "Industrial Centrals." These are made up of groupings of identical or related industries which are given varying degrees of autonomy in planning, operating, marketing and investment. The recent decision on the allocation of profits to the Centrals from Ministries and other economic

organizations means that for the first time profits will be used to a certain degree as incentives to both managers and workers.

A parallel development has been the major reorganization of several Ministries. Their powers have been cut back and more clearly defined, but they are to be held more closely responsible for the tasks which they are commissioned to fulfill under the State Plan.

A new Council of Foreign Trade has been established to co-ordinate foreign trade and some decentralization has followed. Sixteen foreign trade organizations are now the responsibility of the producing Ministries and some of the latter, in conjunction with some Centrals, have been given the responsibility for drawing up and fulfilling the import and export plans for their industries. The Ministry of Foreign Trade, however, remains responsible for fulfilling the State Plan for foreign trade and for the balance of payments situation. It therefore retains an overall authority in this field. While these reforms may be significant to the Romanians, the resulting system is still highly centralized and rigid compared with those in other countries visited.

Foreign trade is substantial, with exports and imports almost balanced at $1.62 billion and $1.71 billion. During the two years since the Canadian-Romanian trade agreement was signed, two-way trade has made good progress. Romania has been more successful in developing sales in Canada than vice versa and this country had a trade deficit of over $5.5 million dollars with Romania in 1969. However, this situation can change rapidly if any one of the major projects being negotiated between Canadian firms and the Romanian Government come our way.

There is essentially no production of scientific instruments in Romania, although some design of prototypes is performed within research institutes for their own needs. Several times homemade and hybrid equipment was seen fulfilling domestic needs, as was the case in several other Eastern European countries.

Scientific activity is again organized on the institute basis; the institute is either affiliated with the Romanian Academy of Sciences, or attached to an individual industrial Ministry. The academy is a federal body and has considerable influence on the selection of sources for imported equipment.

Mission Program, Observations and Comments

The program in Romania was co-ordinated for the mission by the Chamber of Commerce. It was a rather rigid program, one difficult to deviate from with on-the-spot requests though the officials grudgingly accepted them. In all fairness, however, it must be noted that, with advance notice and proper clearance, one mission member visited their nuclear research institute.

The seminars were organized by a Romanian advertising agency, but only three were contracted for because the agency was asking $600 per seminar, a figure way out of proportion to that charged in other countries. The other mission members gave their presentations at the institutes at no charge. All seminars were well attended and a tremendous interest was shown in Canadian equipment by the end-users present. In every case serious discussions followed each seminar and continued the next day, with good prospects in sight for the equipment and systems represented on the mission.

Romania is most fortunate in having an abundant supply of natural resources which are being developed on a priority basis. As a result, Romania has also developed support industries to process these resources. A large part of the priority program is mineral exploration being carried out by the Institute of Applied Geophysics. An excellent relationship was developed with the latter and resulted in a purchase order for $18,000-worth of geophysical equipment while in Romania and upon return to Canada the same firm sold an additional system valued at $25,000. While the Romanians were familiar to some extent with Canadian geophysical equipment, the visit of the mission permitted them to compare equipment and made them determined to buy only Canadian equipment for all their future needs.

The reputation of Romanian geologists and geophysicists is good, and like the Hungarians, they are doing work for the developing nations in Africa and Asia. The Romanians who are always interested in improving their practical skills, have negotiated an agreement to send their experts to work as crew members with one Canadian exploration company and are interested in doing the same with other Canadian companies in this field.

Nucleonic detectors and associated electronic equipment are in good demand in Romania, particularly at the Nuclear Research Institute. The Romanians are in the process of buying a nuclear reactor from the West for electrical generating purposes and have been developing their capabilities in this field. One of the highlights of the mission was a visit by one of the mission members to the Institute, a high security

area. To his pleasant surprise the Institute used almost exclusively detectors manufactured by the Canadian company, which they purchased from the Swiss agent of the Canadian firm. Naturally, this situation will be rectified with direct sales from Canada. The nuclear program is advanced in Romania and, with the pending purchase of a reactor, should result in even better potential for Canadian nucleonic equipment and components.

Romania's other strong point is its agricultural production which is an excellent foreign exchange earner. This industry is also receiving priority treatment, particularly in the irrigation area. Naturally agricultural research equipment is a prime requisite and is in strong demand. However, any major purchases in the West have to be balanced with sales to the West, and the Romanians are masters at barter trade, particularly in the agricultural produce area.

Laboratory standards made in Canada were discussed with end-users at the Metrological Institute and the Institute for Atomic Physics, both of which have a requirement for these high precision instruments. Medical and hospital equipment is in demand, but it was difficult to estimate to what extent.

While most major end-users were contacted by the mission members and showed great interest, they could not move without involving the appropriate State Trading Agency, which is very much in control of purchases in Romania.

TECHNOIMPORT, the agency in question, is the major one concerned with scientific and medical equipment and ELECTRONUM, a fairly new

organization, is taking over responsibility in certain fringe areas of these fields. Both are highly organized into specialty departments and some of these do employ experts and specialists in these fields, which was a pleasant surprise.

To date, Romania has received the least attention from Canadian exporters in the scientific and medical equipment areas. Perhaps this is because they have no indigenous industry in these fields and perhaps because of the remoteness of the country. Hopefully the results achieved by this mission will change that situation, as the potential for sales to Romania is excellent. This plus the fact that French is the second language in that country which almost all end-users speak should spur Canadian companies to better efforts, utilizing the French literature produced for us in Canada as well as the French-speaking capability of Canadian firms.

List of major contacts in Romania

Chamber of Commerce of the Socialist Republic of Romania 22 N. Balcescu Boulevard Bucharest	Arranges contacts between foreign firms and Romanian enterprises, institutes and agencies.
TECHNOIMPORT Doamnei street no. 5 Bucharest	State trading company responsible for laboratory equipment and optical goods, material testing equipment, electric and electronic instruments, industrial measuring instruments, and medical equipment and instruments.
ELECTRONUM 12, B-dul Republicii Bucharest	State trading company responsible for electrical and electronic components, computers, calculators, some measuring instruments, and telecommunication equipment.

POLAND

Area: 120,000 square miles

Population: 32.5 million (1968)

Total imports of medical and scientific equipment: $21.8 million (1966)

General Information

Poland made respectable strides in industrial progress during the 1960's, but the decade closed on a note of economic restraint. The poor economic showing in 1969 was largely due to a fall in agricultural production because of bad weather. This had an impact on the whole economy and affected the balance of payments situation which, together with previous debt obligations, put further pressure on the economic situation.

Caution and consolidation are the operative words for the Polish economy in 1970. The new five-year plan which was to be ready by the fall of 1970, will stress selective and intensive development as opposed to broad development during the previous periods. The objective is to create large-scale, efficient industrial enterprises, with good export capability and performance, particularly in sales to hard currency countries. Profit is becoming more important than volume of production in judging the performance of an enterprise. Return on investment will be emphasized as a management criterion, especially in justifying imports of machinery and equipment from convertible currency countries. Producing enterprises may be involved in determining import and export strategies, making it much easier for Western firms to sit down with Polish managers to discuss business matters frankly and profitably.

Some U.S.$1 billion worth of goods are imported annually from the West with the biggest amount coming from England, West Germany, Italy and France respectively. Canada has enjoyed a substantial balance of trade with Poland for years, accounted for mainly by our wheat sales, but in 1969 Canadian exports slipped substantially, resulting in a U.S.$7 million trade deficit.

More specifically, Poland has a highly developed and broadly based scientific and medical industry. All industrial and institute activity is state administered and controlled with a budget of some U.S.$500 million.

The country has traditionally looked to Western Europe as its main supplier of sophisticated instrumentation and technology. Buyers in state trading organizations have long felt that supply lines to North America were too long, availability of service and spare parts uncertain, and prices too high. This attitude, along with only marginal interest by Canadian firms in the Polish market, has resulted in rather small sales to Poland, and these occurred only in the last two or three years.

Officials of the Polish Chamber of Foreign Trade and other agencies indicated that there is interest in technologically advanced products that can be supplied from Canada, but only those which can contribute to Poland's scientific and industrial development. But they were quite frank in telling the mission members that they look first for suppliers in the domestic market, then among other countries in Eastern Europe and last of all in the hard currency area. The concern was about "hard currency" expenditures which are carefully evaluated before any purchases are made. Nevertheless, a large and undeveloped market exists for

products not available in Poland or Eastern Europe, or which are unique or significantly superior to those available in Western Europe.

Mission Program, Observations and Comments

The mission members had the most extensive and individually tailored program in Poland, arranged by our Trade Commissioner with excellent co-operation from the Polish Chamber of Foreign Trade.

The program in Poland commenced with a meeting organized by and held at the headquarters of the Chamber of Foreign Trade. After a complete briefing by the latter, mission members had an opportunity to meet and discuss their mutual interests with the most important representatives of the foreign trade companies and with end-users who were also present at this meeting. Forthcoming appointments and seminars were reviewed and either confirmed or changed to everyone's satisfaction.

The seminars were held at the headquarters of respective institutes, universities, and hospitals where end-users gathered. Lively discussions followed each seminar and additional appointments were made for specific discussions during the next two days. The seminars in Poland were much more specific than elsewhere, at the request of the Poles, and included presentations of up to six papers in any one product area, which meant that every group of specialists was involved and their interests satisfied.

This approach resulted in exposing the Poles to complete details of Canadian equipment and systems, methods utilized in using the equipment, and the end results that can be expected. The Poles not only have equipment of their own in this sector, they also have well-trained and

up-to-date experts utilizing this equipment in all areas of endeavour covered by the mission members. They needed to be convinced that the Canadian group really had something to offer and after the specific and extensive presentations, they were.

Business will definitely result in the geophysical sector for equipment to be used in mineral and petroleum exploration. Contract surveys will almost certainly be performed first, to demonstrate to the Poles at their request, that Canadian geophysical exploration techniques will perform best, as opposed to techniques they have used which were not too successful. Following the contract surveys, substantial equipment orders should be forthcoming from Poland.

Agriculture still plays a major role in the Polish economy and, due to the rather poor crops in 1969, officials are very much concerned to remedy the situation. The Ministry of Agriculture showed much interest in the plant growth chambers and the potential they have to help the Poles do the research required to improve the agricultural situation.

The Poles are very proud of their nuclear industry and appreciated the seminar on the latest developments in this field in Canada. A visit was arranged to the high-security Nuclear Research Institute at Swierk, which confirmed that the Poles have good reason to be proud of this industry. Definite sales will result, but the Poles were also very interested in the possibility of technical co-operation, exchange of research workers, joint selling in third countries and in counterpart trading-- all of which are being considered and will need to be further discussed and negotiated.

Since the Poles have a well-developed scientific and medical industry, with good quality, accuracy and precision built into their products, they were very interested in and impressed by the metrology equipment from Canada and recognized that these instruments are among the best, if not the best available in the world. In order to maintain and improve their capabilities in the scientific industry, laboratory standards of the accuracy and advanced technological state achieved in Canada are a must to the Poles and it is just a matter of time to complete negotiations for sales to them.

Interest in medical equipment and instruments and techniques was also good, but only in product areas not manufactured in Poland; even here, the Poles were more interested in licensing and joint ventures rather than outright purchases.

Visits were arranged with the appropriate state trading companies which are very much in control of all exports to and imports from Poland. They must be contacted and kept informed about activities any Canadian company may have with Polish institutes and enterprises as, in the end, they will make the final decisions as to what is purchased, and where it is purchased. Scientific equipment and instrumentation is the responsibility of METRONEX, a well-run and competently staffed (with specialists) trade company. Medical, surgical, dental and veterinary equipment and instrumentation falls under the jurisdiction of VARIMEX to which the same comments apply.

The visit to Poland was very complete and very fruitful; it indicated a large interest in Canadian products and a fine potential

for sales. There is a current shortage of hard currency in Poland which will have a definite bearing on any forthcoming purchases of Canadian equipment and only the most immediate requirements with a high priority will be considered. However, counterpart trading, licensing and joint selling in third markets offer a way out if outright sales are not possible, especially since the Poles have a fine scientific and medical industry which can be used to advantage by Canadian firms who are interested and will take the proper steps.

List of major contacts in Poland

Polish Chamber of Foreign Trade
ul. Trebacka 4
Warsaw

Ministry of Foreign Trade
ul. Wiejska 10
Warsaw

METRONEX al. Jerozolimskie 44 Warsaw	Foreign trade enterprise responsible for export-import of electric measuring instruments, nuclear apparatus, non-electric measuring apparatus, optical equipment, laboratory equipment, school aids.
VARIMEX ul. Wilcza 50/52 Warsaw	Foreign trade company responsible for export-import of medical, hospital, and veterinary equipment and instruments, institutional equipment, photo cameras and accessories, film projectors, etc., as well as film tape, and photographic paper.

The complete list of end-users in attendance at seminars, and other information, is available from:

The Chief
Tourist, Hospital and Education Division
Department of Industry, Trade and Commerce
Ottawa 4, Canada

APPENDIX

CANADIAN EXPORTS	Ex: Dominion Bureau of Statistics Catalogue No. 65-004	1968 Can: $ '000
Class No. 700-69	Medical and Related Instruments Equipment and Parts n.e.s.	
	TO: Czechoslovakia	-
	Hungary	-
	Poland	-
	Romania	-
	U.S.S.R.	-
	Yugoslavia	-
Class No. 700-79	Laboratory Optical Instruments Equipment and Parts n.e.s.	
	TO: Czechoslovakia	1
	Hungary	-
	Poland	10
	Romania	26
	U.S.S.R.	-
	Yugoslavia	24
Class No. 700-09	X-ray and Related Equipment and Parts	
	TO: Czechoslovakia	-
	Hungary	-
	Poland	-
	Romania	-
	U.S.S.R.	-
	Yugoslavia	91
Class No. 880-29	Surgical Medical and Dental Supplies n.e.s.	
	TO: Czechoslovakia	-
	Hungary	-
	Poland	-
	Romania	-
	U.S.S.R.	-
	Yugoslavia	-

APPENDIX

CANADIAN EXPORTS

Ex: Dominion Bureau of Statistics
Catalogue No. 65-1004
1968
Can. $ '000

Class No. 880-35	Ophthalmic Lenses	
	TO: Czechoslovakia	-
	Hungary	-
	Poland	-
	Romania	-
	U.S.S.R.	-
	Yugoslavia	-
Class No. 880-39	Ophthalmic Goods n.e.s.	
	TO: Czechoslovakia	-
	Hungary	-
	Poland	-
	Romania	-
	U.S.S.R.	-
	Yugoslavia	-
Class No. 880-69	Hearing Aids Orthopaedic Appliances	
	TO: Czechoslovakia	-
	Hungary	-
	Poland	-
	Romania	-
	U.S.S.R.	-
	Yugoslavia	-

APPENDIX

WORLD IMPORTS

Ex: Supplement to the World Trade Annual
1966 Volume 1
1966
U.S. $ '000

Electro-Medical X-ray Equipment		
TO:	Czechoslovakia	1,171
	Hungary	800
	Poland	1,033
	Romania	254
	U.S.S.R.	2,899
Electro-Medical Equipment		
TO:	Czechoslovakia	372
	Hungary	365
	Poland	531
	Romania	108
	U.S.S.R.	1,694
X-ray Apparatus		
TO:	Czechoslovakia	799
	Hungary	435
	Poland	501
	Romania	147
	U.S.S.R.	1,205
Electrical Measuring and Controlling Equipment		
TO:	Czechoslovakia	5,379
	Hungary	3,631
	Poland	4,366
	Romania	4,618
	U.S.S.R.	12,124

APPENDIX

WORLD IMPORTS

Ex: Supplement to the World Trade Annual
1966 Volume 1
1966
U.S: $ '000

Electrical Measuring and Controlling Equipment n.e.s.	
TO: Czechoslovakia	5,243
Hungary	3,619
Poland	4,290
Romania	4,603
U.S.S.R.	12,056
Optical Instruments	
TO: Czechoslovakia	361
Hungary	144
Poland	127
Romania	95
U.S.S.R.	804
Electron, etc. Diffracting Apparatus	
TO: Czechoslovakia	144
Hungary	-
Poland	41
Romania	37
U.S.S.R.	530
Microscopes Compound Optical	
TO: Czechoslovakia	193
Hungary	66
Poland	43
Romania	180
U.S.S.R.	262
Optical Instruments n.e.s.	
TO: Czechoslovakia	-
Hungary	77
Poland	43
Romania	-
U.S.S.R.	-

APPENDIX

WORLD IMPORTS

Ex: Supplement to the World Trade Annual
1966 Volume 1
1966
U.S: $ '000

Medical Instruments n.e.s.		
TO:	Czechoslovakia	598
	Hungary	617
	Poland	1,098
	Romania	563
	U.S.S.R.	660
Other Medical Instruments		
TO:	Czechoslovakia	560
	Hungary	518
	Poland	1,007
	Romania	352
	U.S.S.R.	616
Mechano-Therapy Apparatus		
TO:	Czechoslovakia	38
	Hungary	99
	Poland	91
	Romania	212
	U.S.S.R.	43
Meters, Counters, Non-electric		
TO:	Czechoslovakia	465
	Hungary	191
	Poland	552
	Romania	624
	U.S.S.R.	197
Gas Liquid Supply Meters		
TO:	Czechoslovakia	194
	Hungary	90
	Poland	298
	Romania	386
	U.S.S.R.	170

APPENDIX

WORLD IMPORTS

Ex: Supplement to the World Trade Annual
1966 Volume 1
1966
U.S: $ '000

Counting Devices Non-electric		
TO:	Czechoslovakia	272
	Hungary	101
	Poland	254
	Romania	238
	U.S.S.R.	27
Measuring Controlling Instruments		
TO:	Czechoslovakia	4,601
	Hungary	3,017
	Poland	5,381
	Romania	2,946
	U.S.S.R.	7,415
Technical Models		
TO:	Czechoslovakia	366
	Hungary	72
	Poland	194
	Romania	-
	U.S.S.R.	229
Mechanical Testing Apparatus		
TO:	Czechoslovakia	560
	Hungary	230
	Poland	276
	Romania	-
	U.S.S.R.	735
Thermometers, Hydrometers, etc.		
TO:	Czechoslovakia	86
	Hungary	32
	Poland	236
	Romania	180
	U.S.S.R.	170

APPENDIX

WORLD IMPORTS

Ex: Supplement to the World Trade Annual 1966 Volume 1
1966
U.S: $ '000

Gas, Liquid Control Instruments		
TO:	Czechoslovakia	824
	Hungary	819
	Poland	1,841
	Romania	867
	U.S.S.R.	1,576
Instruments, Non-mechanical, Non-electric		
TO:	Czechoslovakia	698
	Hungary	423
	Poland	835
	Romania	316
	U.S.S.R.	2,656
Instrument Parts and Accessories		
TO:	Czechoslovakia	741
	Hungary	521
	Poland	1,081
	Romania	588
	U.S.S.R.	902
Hearing Orthopaedic Aids		
TO:	Czechoslovakia	39
	Hungary	-
	Poland	111
	Romania	-
	U.S.S.R.	-
Hearing Aids		
TO:	Czechoslovakia	-
	Hungary	-
	Poland	47
	Romania	-
	U.S.S.R.	-

N.B. No available import statistics for Yugoslavia