

AN ASSESSMENT OF THE  
SASKATCHEWAN PROVINCIAL  
GOVERNMENT EXPENDITURE  
FRONTIER PROGRAM

ROBIN KARPAN

1977

AN ASSESSMENT OF THE  
SASKATCHEWAN PROVINCIAL GOVERNMENT  
EXPORT PROMOTION PROGRAM

A Thesis

Submitted to the College of Graduate Studies and Research  
in Partial Fulfilment of the Requirements  
For the Degree of  
Master of Business Administration

by

Robin Karpan

Saskatoon, Saskatchewan

c 1977. Robin Karpan



The author has agreed that the Library, University of Saskatchewan, may make this thesis freely available for inspection. Moreover, the author has agreed that permission for extensive copying of this thesis for scholarly purposes may be granted by the professor or professors who supervised the thesis work recorded herein or, in their absence, by the Head of the Department or the Dean of the College in which the thesis work was done. It is understood that due recognition will be given to the author of this thesis and to the University of Saskatchewan in any use of the material in this thesis. Copying or publication or any other use of the thesis for financial gain without approval by the University of Saskatchewan and the author's written permission is prohibited.

Requests for permission to copy or to make any other use of material in this thesis in whole or in part should be addressed to:

Dean of the College of Commerce  
University of Saskatchewan  
SASKATOON, Canada

ABSTRACT

The purpose of this study was to assess the scope of the Saskatchewan Government's export promotion program by making comparisons with the export programs of the federal government and the other provincial governments. The study was motivated by the almost total lack of information on this topic in the literature.

The methodology of the research included a survey of available government documents on export promotion, personal interviews with government officials and a mail questionnaire to all provincial governments.

Results indicated that the scope of export assistance offered by the Saskatchewan Government was generally more limited than in most other provinces. The programs available in Saskatchewan were found to be, for the most part, similar in nature to the programs offered by most other provincial governments. While the Saskatchewan Government attempted to supplement export services offered by the federal government, a significant gap had been left with respect to export promotion in the United States. Budgetary restraints had reduced Saskatchewan's export promotion activities in all foreign countries. As many federal programs apply only to countries outside Canada and the United States, Saskatchewan exporters were left without formal, ongoing government assistance programs with respect to their largest export market, the United States. It was

further discovered, however, that the Saskatchewan Government was considering the establishment of promotional programs specifically for the United States, so this gap may be filled in the near future.

ACKNOWLEDGEMENTS

Special thanks is due Professor Rick Burke for his valuable assistance in the supervision of this thesis. Acknowledgements are also due Professors Ken Smith, Jim Carlson, and Howard Tennant.

Substantial assistance was provided by various government officials across Canada. Special acknowledgement is due Ted Gray of the Saskatchewan Department of Industry and Commerce for his help throughout the course of this study. Other officials include Wayne Lorch and John Findlay of the Saskatchewan Department of Industry and Commerce, John Galloway and Inge Ryan of the Saskatchewan Trading Corporation, Gordon Wells of the Saskatchewan Department of Agriculture, Roger Chan of the federal Department of Industry, Trade and Commerce, and numerous other officials in the Saskatchewan Government, the federal government and other provincial governments.

A special thanks is also due my wife, Arlene, for her assistance in the translation work and the typing involved in this study.

TABLE OF CONTENTS

	<u>PAGE</u>
ABSTRACT	i
ACKNOWLEDGEMENTS	iii
TABLE OF CONTENTS	iv
LIST OF TABLES	vi
 <u>CHAPTER</u>	
I <u>INTRODUCTION</u>	1
1. General Statement of Purpose	1
2. Motivation for the Research	1
3. Statement of Research Objectives	2
II <u>BACKGROUND</u>	6
1. Literature Review	6
2. Export Growth Statistics	12
III <u>METHODOLOGY</u>	18
IV <u>RESULTS</u>	25
1. Saskatchewan Export Programs	25
2. Export Programs of the Federal Government	32
3. Export Programs of the Provinces	42
a) Introduction	42
b) Outline of the Programs of Other Provinces	46
c) Comparison of Provincial Export Programs	64
V <u>CONCLUSIONS AND LIMITATIONS</u>	84
VI <u>SUMMARY AND IMPLICATIONS FOR FURTHER RESEARCH</u>	89
1. Summary	89
2. Implications for Further Research	89

	<u>PAGE</u>
APPENDIX A: Questionnaire Sent to Deputy Ministers of Provincial Industry Departments	94
APPENDIX B: French Translation of Provincial Industry Department Questionnaire. Copy sent to the Deputy Minister of the Quebec Department of Industry and Commerce.	106
BIBLIOGRAPHY	123



LIST OF TABLES

<u>TABLE</u>		<u>PAGE</u>
1	TOTAL CANADIAN EXPORTS, 1935 - 1972	13
2	CANADIAN EXPORT GROWTH, 1968 - 1972	14
3	SASKATCHEWAN EXPORTS OUTSIDE CANADA, 1951 - 1974	16
4	EXPORT PROMOTION ACTIVITIES PERFORMED BY PROVINCIAL GOVERNMENTS, AS INDICATED BY PROVINCIAL GOVERNMENT OFFICIALS	44
5	NUMBER OF FULL-TIME PROVINCIAL GOVERN- MENT EMPLOYEES ENGAGED IN EXPORT PROMOTION	45
6	PROVINCIAL GOVERNMENT FINANCIAL RESOURCES COMMITTED TO EXPORT PRO- MOTION IN THE LAST FISCAL YEAR	45
7	MANITRADE PROGRAMS	51
8	QUEBEC DEPARTMENT OF INDUSTRY AND COMMERCE, USE OF FINANCIAL RESOURCES FOR EXPORT PROMOTION (EXCLUDING SALARIES), 1976 - 1977	60
9	THE YEAR IN WHICH FORMAL EXPORT PRO- MOTION PROGRAMS WERE INITIATED BY PROVINCIAL GOVERNMENTS	65
10	DISCONTINUED PROVINCIAL EXPORT PRO- MOTION ACTIVITIES AND THE REASON FOR DISCONTINUANCE	66
11	THE RELATIVE IMPORTANCE OF VARIOUS EXPORT PROMOTION ACTIVITIES THAT MIGHT BE PERFORMED BY GOVERNMENTS, AS PER- CEIVED BY PROVINCIAL GOVERNMENT OFFICIALS	67
12	PERCENTAGE OF PROVINCIAL EXPORT PROMOTION EXPENDITURES DIRECTED TOWARDS FIRMS ALREADY ENGAGED IN EXPORTING AND TOWARDS FIRMS NOT YET EXPORTING	68

<u>TABLE</u>		<u>PAGE</u>
13	PERCENTAGE OF EXPORT PROMOTION EXPENDITURES DEVOTED TO PROVIDING ACTUAL SERVICES, AS OPPOSED TO INFORMING BUSINESSMEN OF THE SERVICES AVAILABLE	69
14	THE ADEQUACY OF PROVINCIAL GOVERNMENT RESOURCES FOR EXPORT PROMOTION, AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS	70
15	THE THREE PROVINCIAL EXPORT PROMOTION ACTIVITIES (IN RANK ORDER) THAT WOULD RECEIVE GREATER ATTENTION IF ADDITIONAL FUNDS WERE MADE AVAILABLE; AND THE THREE ACTIVITIES LIKELY TO BE REDUCED IN SCOPE IF THERE WAS A REDUCTION IN AVAILABLE FUNDS, AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS	71
16	THE RELATIVE IMPORTANCE OF VARIOUS INTERNATIONAL BUSINESS ACTIVITIES TO PROVINCIAL GOVERNMENTS, AS MEASURED BY THE PERCENTAGE OF TOTAL RESOURCES COMMITTED	73
17	THE SIZE OF FIRM THE PROVINCE'S EXPORT PROGRAM IS PRIMARILY DESIGNED TO AID (IN RANK ORDER)	73
18	THE TYPES OF FIRMS THE PROVINCE'S EXPORT PROGRAMS ARE PRIMARILY DESIGNED TO AID (IN RANK ORDER)	74
19	THE RELATIVE IMPORTANCE OF VARIOUS METHODS OF INFORMING BUSINESSMEN OF THE GOVERNMENT EXPORT ASSISTANCE THAT IS AVAILABLE, AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS (IN RANK ORDER)	76
20	BUSINESS INTEREST IN AND USE OF PROVINCIAL EXPORT PROGRAMS, AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS	77
21	RESOURCES REQUIRED FOR SUCCESSFUL EXPORTING, AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS (IN RANK ORDER)	78

<u>TABLE</u>		<u>PAGE</u>
22	PROVINCIAL GOVERNMENT CO-OPERATION WITH THE FEDERAL GOVERNMENT ON EXPORT PROMOTION, AS INDICATED BY PROVINCIAL GOVERNMENT OFFICIALS	79
23	PROVINCIAL CO-OPERATION ON EXPORT PROMOTION WITH SPECIFIC FEDERAL AGENCIES	80
24	THE EFFECTIVENESS OF FEDERAL GOVERNMENT EXPORT PROGRAMS, AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS	80
25	PROVINCIAL GOVERNMENT CO-OPERATION ON EXPORT PROMOTION WITH OTHER PROVINCIAL GOVERNMENTS	81
26	PROVINCIAL GOVERNMENT CO-OPERATION WITH OTHER PROVINCIAL GOVERNMENTS ON SPECIFIC EXPORT PROMOTION ACTIVITIES, AS INDICATED BY PROVINCIAL GOVERNMENT OFFICIALS	82
27	PROVINCIAL CO-OPERATION ON EXPORT PROMOTION WITH SPECIFIC PRIVATE AGENCIES	83

## I. INTRODUCTION

### 1. General Statement of Purpose

The purpose of this research project was to expand the present understanding of business-government co-operation in the export promotion field by examining the role played by the Saskatchewan Provincial Government and making comparisons to the roles played by the federal government and other provincial governments.

The research was primarily an exploratory study, the ultimate purpose of which was to gain sufficient insight into this subject so as to provide a data base upon which can be constructed meaningful hypotheses for further research.

### 2. Motivation for the Research

Programs dealing with the development and promotion of Canadian exports have traditionally been carried out at the federal level. In recent years, however, provincial governments have become increasingly involved. There seems to have been some concern in the provinces that federal assistance programs were insufficient and that provincial involvement was necessary to supplement existing efforts. Some provinces may have also considered their own departments to be more intimately involved with the local business scene and therefore more capable of dealing effectively with local needs. An example of these concerns was evident as early as 1963 when the Committee on

Manitoba's Economic Future recommended greater involvement at the provincial level:

Identifying markets for specific products is a service that could be provided. Much information is already available from the federal Department of Trade and Commerce, but more extensive information oriented to the specific needs of Manitoba exporters is needed to encourage greater participation in exports.<sup>1</sup>

Although provincial involvement in this area has become increasingly important, there has been very little in the literature pertaining to this subject. With respect to the limited information that is available, Saskatchewan programs of export assistance have received even less attention than similar programs in other provinces (for example, Ontario). While Saskatchewan's effort in this field is relatively recent, and on a much smaller scale than the export programs of some of the larger provinces, the Saskatchewan Government involvement in export promotion has on the whole increased since the mid-1960's, reflecting the growing importance of exports to the Saskatchewan economy. Yet, so far, the literature contains no serious attempt to assess the scope of Saskatchewan programs or their effectiveness in promoting Saskatchewan exports.

### 3. Statement of Research Objectives

The primary objectives of this study were as follows:

---

<sup>1</sup> Committee on Manitoba's Economic Future, Manitoba, 1962-1975, Report to the Government of Manitoba, Winnipeg, 1963, p. VIII-3-5

- 1) To determine the scope of Saskatchewan Government export promotion programs
- 2) To determine how Saskatchewan programs compare with, differ from, or complement federal export programs
- 3) To compare Saskatchewan programs with export programs in other provinces.

Published sources presently available do not adequately address these issues. With respect to objective 1, existing Saskatchewan Government documents provide only limited information on the province's export promotion programs.<sup>2</sup> Most of these documents are short pamphlets in point form which provide only an abbreviated explanation of the major aspects of each program. Sufficient information was not available from published sources on such aspects as priorities in programs, the extent to which each program is utilized, and the resources allocated to each activity. There were also indications from Saskatchewan Government officials that major aspects of certain programs have been altered without these changes being reflected in government documents presently available to the public.<sup>3</sup>

---

<sup>2</sup> Export programs are outlined in the following Saskatchewan Department of Industry and Commerce documents: Support Programs for Business and Industry in Saskatchewan, Aid to Trade Program, Trade Talk, and Business Forum.

<sup>3</sup> For example, discussions with Department of Industry and Commerce officials indicated that, due to provincial government budget restraints, a major trade program, Aid to Trade, had become limited to domestic trade. Publications pertaining to this program do not indicate this restriction.

Adequate information on objective 2, concerning a comparison of Saskatchewan and federal programs, is also lacking in publicly available documents. Both federal and provincial publications generally outline only their own programs, although some Saskatchewan documents make reference to the purposes of and the differences between federal and provincial assistance.<sup>4</sup> There is also a considerable amount of federal-provincial co-operation in various aspects of export promotion that is not adequately documented in any of the publications.<sup>5</sup> It is possible that a clear delineation of federal and provincial responsibility is a problem that faces exporters when they are considering government assistance in this area.

With reference to objective 3, very little published information is currently available. One of the more informative documents is an Ontario Government publication which lists some of the major business assistance programs in each of the provinces.<sup>6</sup> Here, export promotion is treated only as a part of the larger field of government assistance to business, and the publication only outlines the various

---

<sup>4</sup> For example, see Aid to Trade Program, Saskatchewan Department of Industry and Commerce.

<sup>5</sup> Interviews with government officials at both the federal and provincial level indicated that from time to time there is co-operation on such programs as bringing a foreign buyer into Saskatchewan. Much of this occasional co-operation is not documented in government documents.

<sup>6</sup> A Guide to Government Assistance Programs for Industry, Ontario Ministry of Industry and Tourism, 1975

programs, with no attempt made at assessment.

These three objectives were designed to provide an assessment of Saskatchewan programs by making comparisons to programs in other governments in Canada. It is recognized that this is only one aspect of conducting a more comprehensive assessment of Saskatchewan export programs. A logical extension of this evaluation would be to assess the Saskatchewan Government's success in meeting the needs of exporters and potential exporters within the province. Although such an assessment is beyond the scope of this study, the comparative evaluation that has been made here provides an important starting point from which a more intensive and comprehensive evaluation might be carried out.



## II. BACKGROUND

### 1. Literature Review

The subject of provincial government involvement in export promotion is noticeably absent from the literature. Some attention has been paid to the involvement of U.S. states in this area, although the amount of work is limited. One of the first studies on this topic, and the one with the most relevance to this research project, was conducted by Albaum in 1968.<sup>1</sup> This study was concerned not only with exports, but also with all aspects of international business involvement by state governments. It endeavored to answer the following questions:

- 1) What activities are state governments performing to promote international business?
- 2) What are the objectives of state government programs?
- 3) How effective are these programs?
- 4) How can existing programs be made more effective?<sup>2</sup>

Albaum's methodology included a census of state governments and a sample survey of business firms. The census of state governments was conducted by sending a written questionnaire to all fifty states and Puerto Rico in order

---

<sup>1</sup> Gerald Albaum, State Government Promotion of International Business, Tucson, Arizona: University of Arizona, Division of Economic and Business Research, 1968.

<sup>2</sup> Ibid., p. 1

to obtain data on the respective government's international business assistance programs. The questionnaire referred to such subject areas as (1) the size and type of business firm the assistance program was designed to aid, (2) the kinds of international business activities actually performed, (3) the perceived importance of each of these activities, (4) the kinds of contact with the business community, and (5) budgetary considerations of the assistance programs.

Albaum's results indicated that more states were directed towards exporting than towards other aspects of international business, such as importing, capital investment, and tourism. The size of business firm towards which most states tended to direct aid was the "under 250 employees" category, and manufacturing received the most attention with regard to the type of firm aided.<sup>3</sup> With respect to specific international business aids, "participation in conferences for businessmen", "trade missions to foreign markets", and "regular circulation of enquiries from abroad" tended to rank as the main export activities performed by state governments.<sup>4</sup>

Albaum also measured businessmen's attitudes toward government services by means of a written questionnaire sent to a sample of Ohio and Illinois business firms. Particularly interesting results were obtained by comparing

---

<sup>3</sup> Ibid., p. 6

<sup>4</sup> Ibid., p. 9

than did businessmen. There was also a tendency for importers and exporters to attach greater importance to the various forms of aid programs than did firms not engaged in international business.<sup>8</sup> Again, the types of possible state government assistance most important to business firms were not always those that were made available to them.<sup>9</sup>

A similar but more comprehensive study was conducted in 1971, concerning the promotion of international business in Oregon.<sup>10</sup> Comparisons were made among the programs of (1) the State of Oregon, (2) the U.S. Department of Commerce in Portland, and (3) The Portland Chamber of Commerce. The study was carried out through personal interviews and a survey of available literature on international business. A written questionnaire was sent to a sample of Oregon firms involved in international business and to a sample of firms not involved in international business. Government agencies generally stated that their programs were designed to aid small- and medium-sized firms not yet engaged in international business.<sup>11</sup> The Portland office of the U.S. Department of Commerce was found to be the best equipped to

---

<sup>8</sup> Ibid., p. 15

<sup>9</sup> Ibid.

<sup>10</sup> Wim van der Ster, "International Business Promotion in Oregon", Oregon Business Review, Vol. XXX, No. 9, September, 1971, pp. 1 - 7

<sup>11</sup> Ibid., p. 2

handle all aspects of international business. State involvement, on the other hand, was found to be relatively low, mainly due to budget restraints.<sup>12</sup>

An interesting aspect of the Oregon study concerned the government officials' stated belief that businessmen's reaction to assistance programs was one of "substantial interest and use". These beliefs were not supported by the research findings. Results indicated that the awareness of programs among international firms was "rather low and usage extremely low".<sup>13</sup> Among non-international firms, awareness was "extremely low and usage mostly non-existent."<sup>14</sup> With respect to the perceived importance of business aids, government officials again attached higher importance levels to these programs than did business respondents.<sup>15</sup>

A Canadian study that refers to some of the issues on government export programs was conducted by Abdel-Malek.<sup>16</sup> Of particular interest for the present study was that businessmen's evaluation of government export services was "largely unfavorable", an opinion shared by both exporters

---

<sup>12</sup> Ibid.

<sup>13</sup> Ibid.

<sup>14</sup> Ibid., p. 3

<sup>15</sup> Ibid., p. 4

<sup>16</sup> Talaat Abdel-Malek, Managerial Export-Orientation: A Canadian Study, London: University of Western Ontario, School of Business Administration, 1974

and non-exporters. It was found, however, that the exporters who made more frequent use of government export services tended to be less critical.<sup>17</sup>

Another Canadian attitudinal study of exporting firms was conducted by the Canadian Export Association (CEA) in 1976. One objective of the survey was to measure the effect of government assistance on actual export performance.<sup>18</sup> Only 23% of respondents replied that their exports had increased as a direct result of the federal government's Program For Export Market Development (PEMD). Only 12% saw exports increasing as a result of the federal trade-fair program, and the same percentage responded favourably with respect to the federal trade mission program. Attitudes toward provincial programs were less favourable. A mere 7% of respondents considered exports to have increased due to provincial trade-fair programs and 11% responded favourably with respect to provincial trade mission programs.<sup>19</sup>

The literature referred to above assisted primarily in providing background information for the present study. The CEA study, and the debate surrounding it, raised many

---

<sup>17</sup> Ibid., p. 67

<sup>18</sup> "Report on Survey: Outlook For Exports", Canadian Export Association, October, 1976

<sup>19</sup> Ibid., p. 3

questions on Canadian export promotion.<sup>20</sup> The present study was also able to benefit by drawing upon research carried out in the United States. Both Canada and the United States are federal systems where the provincial and state levels of government have become increasingly involved in the export scene. It is therefore useful to take into consideration research findings with respect to U.S. states when conducting an evaluation of Canadian provinces.

## 2. Export Growth Statistics

### Canada

Exports have become particularly important to the Canadian economy, especially during the late 1960's and 1970's (see Table 1). Between 1966 and 1972, the value of annual exports almost doubled. By 1972, trade represented 20% of Canada's GNP, up 19% from five years earlier.<sup>21</sup>

Canadian exports have increased to most areas of the world and in most product categories (see Table 2). The United States has for many years been Canada's most important export market. This continues to be the case,

---

<sup>20</sup> For more information on the questions raised by the CEA study, see "Trade Missions Reappraised", Financial Post, February 5, 1977

<sup>21</sup> Review of Foreign Trade, 1966 - 1972, Statistics Canada, External Trade Division, Cat. 65-501 Occasional, August, 1974, p. 41

TABLE 1

TOTAL CANADIAN EXPORTS, 1935 - 1972

Year	Total Exports (\$000)*
1935	735,059
1936	947,045
1937	1,008,773
1938	846,165
1939	933,495
1940	1,185,249
1941	1,588,294
1942	2,311,754
1943	2,922,508
1944	3,398,284
1945	3,214,261
1946	2,298,848
1947	2,789,628
1948	3,086,531
1949	3,004,397
1950	3,142,636
1951	3,945,929
1952	4,337,175
1953	4,152,269
1954	3,925,821
1955	4,332,109
1956	4,839,033
1957	4,899,532
1958	4,898,780
1959	5,144,214
1960	5,390,052
1961	5,902,523
1962	6,357,334
1963	6,989,740
1964	8,303,405
1965	8,766,627
1966	10,325,320
1967	11,419,957
1968	13,679,032
1969	14,868,122
1970	16,818,819
1971	17,820,096
1972	20,064,201
1973	25,301,000
1974	32,052,000

\* Not in constant dollars

SOURCE: 1935 - 1972: Review of Foreign Trade, 1966 - 1972,  
Statistics Canada, External Trade Division, Cat.  
65-501 Occasional, August, 1974, p. 123

1973 - 1974: Canada 1976, Information Division,  
Statistics Canada, 1976, p. 332

TABLE 2

CANADIAN EXPORT GROWTH, 1968 - 1972

	Total	United States Etats-Unis	United Kingdom Royaume-Uni	Japan Japon	European Economic Community Communauté économique européenne	Latin America, Amérique Latine	Commonwealth excluding United Kingdom Communauté sauf le Royaume-Uni	Other Countries, Autres pays
	\$000,000							
Average exports, Valeur moyenne								
Total exports	15,650.0	11,337.4	1,318.6	768.2	1,013.4	520.8	578.4	1,115.6
Total, exportations								
Wheat and flour	775.4	2.2	99.8	83.4	98.2	64.8	67.2	359.8
Blé et farine								
Other foodstuff	1,105.6	639.4	168.4	62.0	77.2	35.2	48.2	78.2
Autres aliments								
Metallic ores and concentrates	1,345.6	472.6	248.4	250.4	204.8	1.8	4.8	162.8
Minerais et concentrés métalliques								
Oil and gas	902.0	902.0	—	—	—	—	—	—
Pétrole et gaz naturel								
Other crude inedible materials	718.6	246.8	44.4	127.6	143.8	22.0	45.8	78.2
Autres matières brutes non comestibles								
Lumber, pulp and paper	2,956.6	2,174.4	271.4	121.4	179.4	76.4	91.6	79.6
Sciages, pâtes et papiers								
Fabricated metals	1,702.4	985.8	299.2	58.8	134.6	68.2	57.4	98.2
Matières travaillées en métal								
Other fabricated inedible materials	989.8	659.4	110.4	31.4	41.4	33.4	67.8	45.6
Autres matières travaillées non comestibles								
Machinery	572.2	423.4	15.2	4.6	18.4	29.4	46.2	35.2
Machinerie								
Motor vehicles and parts	3,724.0	3,502.0	4.0	0.2	6.4	111.2	33.3	58.6
Véhicules automobiles et pièces								
Other inedible end products	1,403.0	958.2	77.4	15.8	92.6	65.8	96.8	97.2
Autres produits finis non comestibles								
Special trade transactions	35.2	28.6	0.4	—	6.4	1.0	2.8	2.0
Transactions commerciales spéciales								
Re-exports	419.8	335.8	11.6	2.2	16.0	12.0	16.0	18.2
Réexportations								
					%			
Annual growth rate, Taux de croissance annuel								
Total exports	9.4	9.5	4.1	11.9	9.9	10.9	3.6	15.5
Total, exportations								
Wheat and flour	10.0	—	-1.9	-1.2	-3.1	15.0	-3.9	22.6
Blé et farine								
Other foodstuff	11.7	7.1	2.6	13.2	30.8	19.7	2.8	30.9
Autres aliments								
Metallic ores and concentrates	4.0	-2.2	6.2	12.1	0.8	26.2	20.9	9.1
Minerais et concentrés métalliques								
Oil and gas	19.6	19.6	—	—	—	—	—	—
Pétrole et gaz naturel								
Other crude inedible materials	9.4	-1.4	-1.1	27.3	19.4	6.6	1.3	5.1
Autres matières brutes non comestibles								
Lumber, pulp and paper	7.5	7.3	5.9	1.3	11.3	11.2	8.2	15.1
Sciages, pâtes et papiers								
Fabricated metals	2.4	2.7	-0.2	-10.3	7.0	4.7	1.1	5.0
Matières travaillées en métal								
Other fabricated inedible materials	14.2	15.8	9.5	6.4	-1.2	9.2	13.9	13.1
Autres matières travaillées non comestibles								
Machinery	8.1	6.6	12.9	13.1	14.1	17.0	5.8	15.3
Machinerie								
Motor vehicles and parts	12.2	12.9	9.0	—	16.1	5.1	-15.2	-1.9
Véhicules automobiles et pièces								
Other inedible end products	9.6	7.4	14.6	7.7	17.4	19.2	6.0	14.7
Autres produits finis non comestibles								
Special trade transactions	1.1	3.1	—	—	—	—	—	—
Transactions commerciales spéciales								
Re-exports	5.6	5.9	-1.6	—	6.3	3.4	1.6	13.7
Réexportations								

SOURCE: Review of Foreign Trade, 1966 - 1972, Statistics Canada, External Trade Division, Cat. 65-501, Occasional, August 1974, p. 29



although markets have become more diversified. Between 1968 and 1972, the United States proportion of Canadian exports dropped from 73.2% to 69.4%.<sup>22</sup> During the same years, as indicated in Table 2, the average annual growth rate of exports to Japan, the EEC and Latin America exceeded the growth rate to the United States. It is also important to note that between 1968 and 1972, there were positive annual growth rates in Canadian exports to all principal trading areas and in most principal product areas.<sup>23</sup>

#### Saskatchewan

Saskatchewan, like Canada as a whole, has experienced an increase in exports in recent years (see Table 3). In 1974, the value of Saskatchewan exports rose to over \$2.1 billion, an increase of more than 25% over the 1973 value. Significant increases in 1974 were experienced in most of the province's major export items. Grains and oil seeds exports increased by 27%, from \$1.1 billion in 1973 to \$1.4 billion in 1974. Crude oil increased by 49.5% from \$141 million to \$211 million, and potash increased 64.2% to \$307 million in 1974. Farm machinery exports doubled from 1972 to 1973, with a further increase of 54% to over \$14.1 million in 1974. Other commodities

---

<sup>22</sup> Ibid.

<sup>23</sup> The years 1968 - 1972 are the most recent analyzed by Review of Foreign Trade, an occasional publication of Statistics Canada.

TABLE 3

SASKATCHEWAN EXPORTS OUTSIDE CANADA, 1951 - 1974 \*

<u>Year</u>	<u>Value</u> <u>(Millions of Dollars)</u>
1951	357
1952	486
1953	419
1954	276
1955	303
1956	346
1957	371
1958	378
1959	337
1960	408
1961	481
1962	480
1963	679
1964	771
1965	734
1966	916
1967	756
1968	580
1969	599
1970	773
1971	960
1972	1,156
1973	1,704
1974	2,147

---

\* Not in constant dollars

SOURCE: Saskatchewan Economic Review, 1975, Saskatchewan Bureau of Statistics, October, 1975, p. 43

experiencing increased export sales included milled cereals, dehydrated alfalfa, rapeseed oil, steel pipes, wood pulp, and sodium sulphate. In 1974, 89% of Saskatchewan's exports consisted of grains and oil seeds, crude oil, and potash.<sup>24</sup>

Saskatchewan exports were approximately 6.6% of total Canadian exports in 1974.<sup>25</sup> Saskatchewan has also become a major supplier (over 30%) of a number of Canada's major export items, including grain and oil seeds, potash, sodium sulphate, helium, pork bellies, dehydrated alfalfa, rapeseed oil, and various types of agricultural machinery.<sup>26</sup>

---

<sup>24</sup> Business Forum, Saskatchewan Department of Industry and Commerce, No. 6, November, 1975

<sup>25</sup> Ibid.

<sup>26</sup> Ibid.

### III METHODOLOGY

The methodology involved three major means of investigation: (1) a survey of available literature and government documents on government export promotion, (2) personal interviews with government officials, and (3) mail questionnaires to each provincial government. The methodology utilized to achieve objectives (1) and (2) involved the first two means of investigation. Information was obtained from government documents contained in the University of Saskatchewan Government Documents Library or supplied directly from the various government departments. In addition, information not available through publications was obtained through correspondence and discussions with officials in the Saskatchewan Department of Industry and Commerce, the Saskatchewan Department of Agriculture, the Saskatchewan Trading Corporation, and the Ottawa and Regina offices of the federal Department of Industry, Trade and Commerce. Various other sources were also utilized, including discussions or correspondence with officials in Statistics Canada, The Saskatchewan Bureau of Statistics, the Canadian Export Association, Boards of Trade, and various departments and agencies in the federal and provincial governments.

Objective (3) primarily involved a mail questionnaire, although a survey of available provincial government documents was also used. The questionnaire, a copy of

which is included in Appendix A, was sent to the Deputy Minister of the relevant department in each of the ten provinces.<sup>1</sup> The questionnaire was thoroughly pilot-tested by faculty members at the University of Saskatchewan and by government officials.<sup>2</sup>

The questions can be divided into three major groups: (1) questions intended to obtain comparable background data on the characteristics of each province's export programs, (2) questions concentrating on government officials' attitudes towards businessmen and towards government-business relations, and (3) questions concentrating on the province's relationship with other governments in Canada.

With reference to background characteristics, questions on the following topics were included:

- 1) The year in which the province formally initiated an export program
- 2) The number of government employees engaged in export promotion
- 3) Export activities performed

---

<sup>1</sup> The specific departments include the Saskatchewan Department of Industry and Commerce, the British Columbia Department of Economic Development, the Alberta Department of Business Development and Tourism, the Manitoba Department of Industry and Commerce, the Ontario Ministry of Industry and Tourism, the Quebec Department of Industry and Commerce, the New Brunswick Department of Commerce and Development, the Nova Scotia Department of Development, the Prince Edward Island Department of Industry and Commerce, and the Newfoundland Department of Industrial Development.

<sup>2</sup> The Province of Quebec received a French translation of the questionnaire, and this version was further tested by various people familiar with translation work. A copy is included in Appendix B.

- 4) Export activities discontinued
- 5) The importance of various export promotion activities
- 6) Financial resources committed to export promotion
- 7) The amount of expenditures directed towards exporting and non-exporting firms
- 8) The percentage of expenditures devoted to performing services, as opposed to informing businessmen of the services available
- 9) The adequacy of government export promotion resources
- 10) Export activities likely to be increased or reduced in scope if there was an increase or reduction in available funds
- 11) The percentage of expenditure for exports, as opposed to expenditure for other types of international business
- 12) The size of firm export programs are designed to aid
- 13) The type of firm export programs are designed to aid.

Questions concentrating on government officials' attitudes towards businessmen and towards government-business relations included the following topics:

- 1) The importance of various methods of informing businessmen of government export assistance
- 2) The reaction of businessmen to attempts

to encourage them to use government programs

- 3) The resources required by business firms for successful exporting.

Questions concentrating on inter-governmental relations included the following topics:

- 1) Export activities where there was co-operation with the federal government
- 2) Federal agencies with which there has been co-operation
- 3) The perceived effectiveness of specific federal export aids
- 4) The number of other provinces with which there has been co-operation
- 5) Export activities where there was co-operation with other provinces
- 6) Private agencies with which there has been co-operation.

Response to some questions required interpretation or opinions as well as simple matters of fact. For example, it may be difficult to delineate where funds are being used for promotion of large or small firms, so there may be some interpretation on the part of the respondent as to whether the main thrust of an export program is to aid smaller or larger firms. Some questions required personal perceptions or opinions on the part of the respondent. This type of question could result in varying responses according to the particular respondent. Thus,

in order to obtain comparable data, it was requested that in each case the questionnaire be completed by the Deputy Minister of the respective provincial departments, or by someone designated by him.

The design of the questionnaire has some similarities to the questionnaire used in the Albaum study, but also has some major differences. Albaum used a rather lengthy questionnaire in his survey of state governments, and many of the questions required additional explanation or comment. The present study required a questionnaire which would obtain the greatest possible amount of information not available elsewhere while at the same time obtaining the highest possible response rate. It was therefore considered necessary to design a questionnaire which would be relatively easy and quick to complete. To achieve this goal, complexity was minimized, and questions requiring lengthy, written responses were avoided.

The questionnaire in the present study made extensive use of ranking, as it was considered desirable to obtain more information than the government's first priority with respect to such subjects as the size and type of business firm export programs were designed to aid. For example, if a government were to indicate a medium-sized firm as its top priority, it would still not be known whether second priority was given to small- or large-sized firms. Consequently, respondents were asked to rank the different sizes of business firms, making it possible to obtain more



information from the same question.

In the present study it was decided to utilize a scale of three in measuring levels of importance; (1) very important, (2) fairly important, and (3) not important. A "neutral" response was not included because it was considered likely that a senior government official involved in export work would have an opinion concerning all of the questions asked. It was also considered unnecessary to include more than one scale of "not important", as any indication of unimportance would give the required information while at the same time keeping the question as simple as possible.

Provision for a "not sure" answer was made in one question asking provincial officials to rate the effectiveness of specific federal programs. A scale of three was used for indicating effectiveness, but a "not sure" possible response was also included in case a respondent was not sufficiently familiar with a particular federal program to give an adequate response.

In order to facilitate a speedy response to a number of the longer questions, a standard format of a list of possible government export promotion activities was utilized. Included were questions pertaining to the perceived importance of export activities, activities actually performed by the respondent's government, activities which have been discontinued, activities likely to be increased in scope if additional funds were made available, and

co-operation with the federal government.

The questionnaire used indicators that would be the most familiar to government respondents. For example, it was recognized that the number of employees is only one factor in measuring the size of a business firm. It is, however, the most common indicator of size used by government and, because this study was concerned with responses from government sources, it was considered the most appropriate indicator in this case.<sup>3</sup> Similarly, there are various factors in measuring the amount of effort expended by a government in promoting a particular program. However, government sources indicated that the amount of funds allocated to a program is generally the best single indicator of the importance attached to it.<sup>4</sup> Consequently, the study relied upon government spending as a major indicator of government effort in promoting exports.

---

<sup>3</sup> Indicated by officials in The Saskatchewan Department of Industry and Commerce.

<sup>4</sup> Indicated by officials in The Saskatchewan Department of Industry and Commerce.

## IV RESULTS

### Introduction

The results are based upon data available in winter, 1977. The opinions of government officials expressed in this study are those of the individuals who responded to the questionnaire. It was requested that in each case the Deputy Minister of the relevant department appoint the appropriate respondent.

#### 1. Saskatchewan Export Programs

Two departments of the Saskatchewan Government have responsibility for export promotion. The Department of Industry and Commerce presently has the most extensive program, although an increasing number of trade services are also offered by the Department of Agriculture. In addition, a crown corporation, SASKTRADE, provides the function of a trading house and offers a variety of services to Saskatchewan exporters.

#### Department of Industry and Commerce

Most trade promotion work in the Saskatchewan Government is conducted through The Department of Industry and Commerce. Until very recently, one of the most important export activities performed by this department was through the medium of the "Aid to Trade" program. The basic purpose of this program, as outlined in the Aid to Trade Program brochure, is "to support projects that will result in additional employment opportunities with the province".<sup>1</sup> However, with respect to exporting, the brochure

---

<sup>1</sup> Trade Program, Saskatchewan Department of Commerce, undated.

includes the following caution:

The Aid to Trade program is designed to supplement rather than duplicate incentive programs offered by the federal Department of Industry, Trade and Commerce. If your project concerns foreign markets only, we suggest that you apply first to the federal government.<sup>2</sup>

Specific objectives of the Aid to Trade program are outlined in the brochure Saskatchewan Is.... Financial assistance is provided to Saskatchewan firms who wish to:

- 1) Promote and/or advertise projects in new markets
- 2) Exhibit their products and/or services in new markets
- 3) Explore foreign markets and investigate sales opportunities
- 4) Ship sample merchandise to potential markets
- 5) Bring foreign buyers to Saskatchewan
- 6) Undertake one or more market feasibility studies with the assistance of a professional research agency.<sup>3</sup>

However, recent discussions with Industry and Commerce officials reveal that during the 1976/77 fiscal year, budget restraints have necessitated that the international dimension of this program be discontinued. It is uncertain whether this reduction in services is a temporary phenomenon.

---

<sup>2</sup> Ibid.

<sup>3</sup> Saskatchewan Is..., Saskatchewan Departments of Agriculture and Industry and Commerce (undated)

Market identification and market research are currently important sources of assistance to Saskatchewan exporters. Of particular significance has been research conducted on markets for farm machinery, which comprises the largest single manufacturing product group for export.<sup>4</sup> Special attention has been given to those areas in the United States where farming conditions are similar to those in Saskatchewan and where similar types of agricultural implements could be used. Research in this area has produced a market guide and handbook of the North American market for Saskatchewan farm machinery. This study provided Saskatchewan farm machinery manufacturers with a sound information base as to where their market potential lies.<sup>5</sup>

One of the most significant promotional items with respect to agricultural machinery has been the Prairie Implement Buyer's Guide, published annually by the department. The Guide is distributed to all farmers in the prairie provinces, and a large number of issues are sent to Eastern Canada, many U.S. states, and to every Canadian trade commission office abroad. It costs a

---

<sup>4</sup> For identification of product groups which are exported, see the Saskatchewan Manufacturer's Guide, Saskatchewan Department of Industry and Commerce, 1975-76.

<sup>5</sup> The North American Market for Saskatchewan Farm Machinery, prepared by Peter Dittman and Tom Rogers, Trade Development Branch, Saskatchewan Department of Industry and Commerce (undated)

manufacturer \$220 for his product to appear in the Guide, while it has been estimated that it would cost an individual manufacturer about \$9,000 to achieve comparable advertising coverage on his own.<sup>6</sup>

Farm implement companies have also been encouraged to participate in the department's trade-fair program. In the 1975-76 fiscal year, exhibits were sponsored in fairs held in North Dakota, Kansas, Britain and France. It was reported that, because of the exhibits in Europe, more Saskatchewan firms have established contact with foreign agents and distributors and that several shipments of farm machinery have resulted.<sup>7</sup>

Other product groups recently receiving special attention include handcrafts, sporting goods, recreational vehicles, and electrical and electronic products.<sup>8</sup>

Unlike some of the other provinces, Saskatchewan does not maintain permanent trade representatives in other countries, with the exception of Saskatchewan House in London which is responsible to the Department of Industry and Commerce. Although trade is one aspect of this representation, Saskatchewan House is also concerned

---

<sup>6</sup> Figures provided by the Department of Industry and Commerce officials.

<sup>7</sup> Saskatchewan Department of Industry and Commerce, Annual Report, 1975-76, p. 14

<sup>8</sup> Ibid.

with other activities, including industrial development in Saskatchewan and assisting in the recruitment of skilled workers to the province. With respect to trade and industrial development, the territory covered by Saskatchewan House includes the United Kingdom and Europe.

Another area of importance for Saskatchewan exports is the Pacific Rim, for which the primary markets are Japan, Korea, parts of South-East Asia, and Australia. Japan is by far the most important of these markets, receiving about 15% of Saskatchewan's total exports.<sup>9</sup> Saskatchewan's largest trading partner, however, is the United States, and this area is handled directly from Regina, with no permanent representatives stationed in that country.

#### Department of Agriculture

A number of export-related activities are performed by the Saskatchewan Department of Agriculture's Marketing and Economics Branch and Market Development Fund. While little is available in document form, interviews with department officials indicated participation in the following kinds of export activities:

- 1) organizing trade missions to foreign markets
- 2) exhibits in international trade-fairs
- 3) advertising in overseas markets
- 4) providing information on overseas market areas

---

<sup>9</sup> Figures provided by the Senior Trade Consultant, Saskatchewan Department of Industry and Commerce.

- 5) consultation on foreign trade possibilities
- 6) regular circulation of enquiries received from abroad
- 7) assistance in performing the mechanics of exporting
- 8) maintaining permanent files on trade leads
- 9) performing research projects on foreign markets

A project worthy of special note is the establishment of The Alfalfa Group, which is composed of a number of dehydrated alfalfa processors in the province. Previously, each processor would market its own alfalfa, primarily to Japan. The difficulties experienced when relatively small processors dealt with large, experienced Japanese trading companies, together with increased competition in the Japanese market, created a need for a co-operative effort on the part of the processors. To meet this need, The Alfalfa Group was organized with the assistance of the Department of Agriculture and the Department of Industry and Commerce. These departments contributed about \$75,000 in direct funds and three to four man-years in work. Dehydrated alfalfa exports, which usually comprise over 75% of Saskatchewan production, are now handled by the Group, which has succeeded in overcoming many of the obstacles previously encountered by individual processors in world markets. Although Japan is still the most important export market, sales have been made in Continental Europe and potential markets have been



recognized in Britain, the Middle East, and South America.<sup>10</sup>

The Saskatchewan Trading Corporation (SASKTRADE)

The Saskatchewan Trading Corporation originally began as an extension of the Trade Development Branch of the Department of Industry and Commerce. Its purpose was to fill a significant gap resulting from the lack of international trading houses in the province. In 1974, SASKTRADE was established as a crown corporation, and administrative changes in 1977 have placed the Corporation under the direct administration of the Department of Agriculture.

SASKTRADE generally concentrates on smaller exporters; those which are not large enough to perform their own trading function. The Corporation can purchase products as principal/merchant and arrange for resale; act as an agent at an agreed upon commission; and provide a consulting service at a negotiated fee.<sup>11</sup> The activities of SASKTRADE have thus far concentrated on the agricultural sector, with such exports as dehydrated alfalfa, various special crops and pure-bred cattle.<sup>12</sup>

---

<sup>10</sup> Based on interviews with officials in the Departments of Industry and Commerce and Agriculture and The Alfalfa Group.

<sup>11</sup> "The Saskatchewan Connection" To World Markets, Saskatchewan Trading Corporation (undated)

<sup>12</sup> Based on interviews with SASKTRADE officials.

2. Export Programs of the Federal Government  
Department of Industry, Trade and Commerce

Most federal assistance in the export area is administered by the Department of Industry, Trade and Commerce. Its two major programs are the Promotional Projects Program (PPP), where the department initiates, plans, selects the participants, and implements all aspects of the undertaking; and the Program for Export Market Development (PEMD), where the initiatives must come from industry and the department underwrites part of the cost. A number of other programs also exist, most of which are of a more specialized nature.

The largest of these programs is PEMD, the stated objective of which is,

"...to develop and sustain exports of Canadian goods and services. To this end, the department is prepared to make repayable contributions towards a company's cost in developing export business - costs that might otherwise discourage such an attempt.<sup>13</sup>

There are five main sections to the PEMD program:

- 1) Section "A": Incentive for Participation in Capital Projects Abroad
- 2) Section "B": General Market Development
- 3) Section "C": Incentive for Participation in Trade Fairs Outside Canada
- 4) Section "D": Incoming Foreign Buyers
- 5) Section "E": Export Consortium Assistance

---

<sup>13</sup> Program for Export Market Development, Synopsis, paper reference PEMD/1, August 1, 1974

The objective of section "A" is to assist Canadian companies in competing for work on capital projects abroad, with the intention of increasing Canadian business over what would have been possible without the assistance. The financial contribution is concerned with the costs incurred in the pre-contract stages, and is only applicable where there is an element of competition from foreign sources. The amount of the contribution is normally \$70 for each day spent on the project by eligible company personnel and 50% of transportation, special and unusual costs. The contribution is only repayable if the company gains the business sought.<sup>14</sup>

The eligibility requirements for the company applying to participate in the program, and for the proposed project itself, are as follows:

The applicant company must:

- 1) be currently established and operating in Canada
- 2) have ability, or demonstrated potential, for competitive performance in foreign markets for the services concerned
- 3) have satisfactory financial and management strengths.

The project must:

---

<sup>14</sup> For more detailed information on eligible costs for this and other PEMD sections, see Program for Export Market Development, Eligible Costs, paper reference PEMD/3, August 1, 1974

- 1) be specific (actual or potential) in respect of the goods, services and regions concerned
- 2) apply to goods and services for which competent Canadian sources and/or capabilities exist
- 3) promise significant Canadian content
- 4) have a reasonable probability of success
- 5) appear financially sound
- 6) provide opportunity for follow-on business
- 7) make "good business sense" in terms of the costs involved
- 8) represent an extension of the normal effort of the applicant in the export field in terms of product, region, cost or risk
- 9) promise a net increment in exports to the region concerned, from Canadian sources taken as a whole.<sup>15</sup>

Upon completion of the project, or completion of a project under any other section of PEMD, the company must submit a report to the department, including reference to the success of the project, factors governing success or lack of success, and possible alternative strategies.

---

<sup>15</sup> Program for Export Market Development, Incentive for Participation in Capital Projects Abroad, paper reference PEMD/2, August 1, 1974

This part of the report is confidential, but a second part, containing suggestions for other Canadian firms entering the same market, is intended for the industry as a whole.<sup>16</sup>

Section "B" has two major parts - market identification and market adjustment. Part I applies where a company is generally aware of a foreign opportunity but is unable to make more definite plans because of the costs and risks involved. Part II concerns initial adaptation to unfamiliar marketing practices, and includes provision for assistance on such aspects as translation of sales literature, specialist technical advice, establishment of after sales service, study of special sourcing requirements, unusual product demonstration requirements, and some language training.<sup>17</sup>

Section "C" applies to trade-fairs outside Canada, but excludes government-sponsored national exhibits. The normal financial assistance will be a fixed contribution of \$70 for each day spent on the project by eligible company personnel and 50% of transportation, special and unusual costs. Repayment is not required if the company is not successful in obtaining business.<sup>18</sup>

---

<sup>16</sup> Program for Export Market Development, Final Report, paper reference PEMD/10, August 1, 1974

<sup>17</sup> Program for Export Market Development, Section "B", General Market Development, paper reference PEMD/6, August 1, 1974

<sup>18</sup> Program for Export Market Development, Section "C", Incentive for Participation in Trade Fairs Outside Canada, paper reference PEMD/7, August 1, 1974

The objective of section "D" is to encourage Canadian companies to bring potential foreign buyers to Canada. The department's contribution will be one-half of the buyer's transportation costs to agreed upon locations and an allowance of \$25 per buyer day. Repayment is only required if the company is successful in obtaining business.<sup>19</sup>

The purpose of section "E" is to improve the export performance of Canadian companies, particularly small- to medium-sized companies, by promoting the use of export consortia. There are two major parts to the program - study prior to the formation of the consortium, and formation and initial operation. If, after the first phase, the consortium is not formed, contributions will not be repayable.<sup>20</sup>

The PPP program includes trade-fairs outside Canada, incoming and outgoing trade missions, and a trade visitors program. Under the trade-fair section, the department sponsors participation in trade-fairs, usually with an emphasis on product and commercial specialization. Consequently, participation is usually limited to specific industry sectors. Participation in department sponsored trade missions is by special invitation of the Minister,

---

<sup>19</sup> Program for Export Market Development, Section "D", Incoming Foreign Buyers, paper reference PEMD/8, August 1, 1974

<sup>20</sup> Program for Export Market Development, Section "E", Export Consortium Assistance, paper reference PEMD/6, August 1, 1974

and the Minister or another senior department official will often participate personally in the mission. Upon completion of the mission, participants must contribute to a report which is made available to the industry at large. As in the trade-fair section, many outgoing missions are highly specialized, focussing on a single industry or product group. Under the trade visitors section of the PPP program, the department invites influential foreign representatives, both from government and business, to examine Canadian industry and products.<sup>21</sup>

In addition to the PEMD and PPP programs, which are fairly large in scope, there are a number of more specialized export programs. One such program is the Grains and Oilseeds Marketing Incentives Program (GOMI), where the department will provide assistance in the form of contributions and risk insurance for the marketing of certain grains and oilseeds.<sup>22</sup> Another assistance program is the Agricultural and Food Products Market Development Assistance Program. Three types of projects can qualify under this program: (1) feasibility projects, (2) development projects, and (3) Canadian capability projects. There are also three forms of assistance available: (1) non-recoverable

---

<sup>21</sup> Department of Industry, Trade and Commerce, Federal Export Programs and Services, Ottawa, Information Canada, 1975

<sup>22</sup> Department of Industry, Trade and Commerce, Incentive and Development Programs for Canadian Industry, Ottawa, Information Canada, 1973

contributions, (2) recoverable contributions, and (3) contingent contributions, depending upon the nature of the project.<sup>23</sup> Various other assistance programs with a strong export emphasis are also available, including the Canada - U.S. Defence Production Sharing Agreement, which provides Canadian manufacturers with the opportunity to supply the U.S. Armed Forces with a wide range of defence supplies and services in competition with U.S. industry; the Defence Industry Productivity Program (DIP), which assists in strengthening the technological competence of the Canadian defence industry in its export activities; the General Adjustment Assistance Program (GAAP), which helps industry to improve its position in meeting international trade competition; and the Export-Oriented Training Program, which assists foreign trainees, who might be in a position to influence buying decisions, to take training in Canada. In addition to the specific assistance programs, the department also provides general information on market opportunities through the Trade Commissioner Service and through various publications and periodicals.<sup>24</sup>

Export Development Corporation

Export assistance is also offered by the Export

---

<sup>23</sup> Ibid.

<sup>24</sup> Department of Industry, Trade and Commerce periodicals with a major export content include Canada Commerce, Canada Courier, and Trade News, Food and Agriculture.



Development Corporation, with three types of aid made available: (1) Export Credit Insurance, which insures firms against non-payment when goods and services are sold abroad; (2) long-term export loans to foreign buyers of Canadian capital equipment and technical services; and (3) foreign investment guarantees, insuring Canadians against loss of their investments abroad by reason of political action.

With reference to the export credits insurance, the EDC may insure contracts involving consumer goods and general commodities sold on short-term credit terms up to a maximum of 180 days, and capital goods on medium-term credit up to a maximum of five years.

The following are the main risks covered under an EDC policy:

- 1) insolvency of the foreign buyer
- 2) failure of the buyer to pay to the exporter, within six months after the due date, the gross invoice value of goods which he has duly accepted
- 3) repudiation by the buyer which does not result from a breach of contract by the exporter, and where proceedings against the buyer would serve no useful purpose
- 4) blockage of funds or transfer difficulties which prevent the Canadian exporter from receiving payment
- 5) war or revolution in the buyer's country

- 6) cancellation or non-renewal of an export permit and the imposition of restrictions on the export of goods not previously subject to restriction
- 7) any other cause outside the control of both the exporter and the buyer which arises from events occurring outside Canada and the continental United States.<sup>25</sup>

The EDC policy does not generally cover risks that can be normally insured through a commercial insurer.

Long-term loans are extended to foreign buyers if the project under consideration is commercially sound and if the foreign buyer and the country to which the goods are shipped are creditworthy. This section of the program applies to Canadian exports of capital equipment and related services when extended credit terms are required to meet international competition and when commercial financing is not available. There is also a minimum standard with respect to Canadian material and labour content.<sup>26</sup>

The investment guarantee section covers three broad areas of political risk: (1) inability to repatriate earnings or capital, (2) expropriation, and (3) war, revolution, or insurrection. The investor can take out a policy on any or all three political risks, and the length of the

---

<sup>25</sup> An Introduction to Canada's Export Development Corporation, Export Development Corporation

<sup>26</sup> Ibid.

policy is normally three years. The program requires the investor to carry a portion of the liability, usually 15%, while the remainder is borne by the EDC.<sup>27</sup>

Total EDC support of Canadian exports in 1975 amounted to \$2.046 billion, compared with \$1.701 billion in 1974, an increase of about 20%. Exports credits insurance coverage amounted to \$901.70 million worth of Canadian goods and services sold abroad in 1975. During the same year, the loans division arranged forty loan agreements worth \$1.135 billion. Since the program began in 1971, the number of foreign investment insurance contracts in force has risen from four to thirty-five, and the aggregate maximum coverage rose to \$68.4 million, up from \$43.5 million in 1974. In 1975, investments were insured in four new countries - Haiti, Mexico, Spain and Turkey, bringing to nineteen the number of countries in which the program has operated.

Canadian International Development Agency (CIDA)

CIDA's Business and Industry Division is involved in a number of activities that will assist Canadian companies in trade matters, such as sponsoring investment promotion meetings in Canada for developing countries, and information sessions on investment incentives, commercial regulations

---

<sup>27</sup> Ibid.

<sup>28</sup> Export Development Corporation, Annual Report, 1975.

joint ventures, and turnkey projects. CIDA also offers financial incentives for companies considering investment overseas. Businesses with at least 51% Canadian ownership can receive a grant of up to \$2,500 to visit a particular country to examine the investment opportunity, and it can receive the lesser of \$25,000 or 50% of allowable costs for a feasibility study. The company could also receive assistance from the division in carrying out the feasibility study.<sup>29</sup>

### 3. Export Programs of the Provinces

#### a) Introduction

Export promotion programs vary considerably from province to province. While some provinces provide a very extensive array of export aids (for example, Ontario and British Columbia), others do not have formal programs pertaining specifically to exports (for example, Prince Edward Island and Newfoundland). Saskatchewan's effort in the export field is between these two "extremes". While the extent of provincial assistance available in Saskatchewan is very limited when compared to what is available in a larger province like Ontario, the results of this study indicate that Saskatchewan does offer more export aid than some of the other provinces.

The purpose of this section is to examine Saskatchewan

---

<sup>29</sup> Canada and Development Co-operation, CIDA Annual Review, 1975-76.

in terms of the export assistance that is available in other provinces. Tables 4 to 6, based upon questionnaire results, give a brief overview of the extensiveness of provincial programs across Canada. This is followed by a more detailed description of the programs in the other provinces based primarily upon documents from the respective governments, and direct comparisons of the provinces on specific issues, based upon questionnaire results.

Table 4 gives an indication of the extent of export assistance available in each of the provinces. With a few exceptions, the listed export activities that are performed by most of the provinces are generally those also performed by Saskatchewan.

With reference to the number of government employees engaged in export promotion, Table 5 indicates Saskatchewan as being toward the lower end of the continuum. However, the Saskatchewan response to the questionnaire refers only to employees of the Department of Industry and Commerce, and does not include employees of the Department of Agriculture or SASKTRADE. Also excluded are support staff or employees working part-time on special projects.

Another indicator of the scope of a province's involvement in export promotion is the amount of financial resources committed to this area. As indicated in Table 6, the range of expenditures is quite wide. Saskatchewan is again toward the lower end of the continuum. In



TABLE 5

NUMBER OF FULL-TIME PROVINCIAL GOVERNMENT  
EMPLOYEES ENGAGED IN EXPORT PROMOTION

<u>Province</u>	<u>Number of Employees</u>
B.C.	10
Alta.	40
SASK.	3*
Man.	14
Ont.	46
Que.	15
N.B.	5**
N.S.	4
P.E.I.	
Newf.	

\* Department of Industry and Commerce only. Does not include support staff.

\*\* Department of Commerce and Development only.

TABLE 6

PROVINCIAL GOVERNMENT FINANCIAL RESOURCES  
COMMITTED TO EXPORT PROMOTION  
IN THE LAST FISCAL YEAR

<u>Expenditure</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Less than \$25,000										
\$ 25,000 - 49,999							x**			
50,000 - 99,999			x*							
100,000 - 249,999								x		
250,000 - 499,999	x			x						
500,000 and above		x			x	x				

\* Exclusive of salaries

\*\* Program money only, exclusive of salaries, travel of staff, and related overheads.

general, the larger provinces, and those with a larger number of employees engaged in export promotion, also tended to commit more money to export activities.

b) Outline of The Export Programs of Other Provinces  
British Columbia

British Columbia export programs are under the auspices of the Business and Industrial Development Branch of the Department of Economic Development. The department has a very extensive trade mission program and, in 1974, missions were launched to Malaysia, Indonesia, South Korea, Germany, Italy, Latin America, Japan, the United Kingdom, Belgium, Holland, France, Australia, and New Zealand.<sup>30</sup> The products promoted included forest equipment, kitchen cabinets, product licencing, marine equipment, pre-fabricated housing, fish products and housing components. Financial support generally includes all transportation costs associated with the mission, provision of interpreters, as well as the cost of hosting official receptions where appropriate.<sup>31</sup>

The Incoming Buyers Program in 1974 brought buyers from Australia, Brazil, France, Germany, Japan, and other countries. The buyers were primarily interested in forest

---

<sup>30</sup> British Columbia Department of Economic Development, 1974 Annual Report, p. 3

<sup>31</sup> Business Development Programs, British Columbia Department of Economic Development, p. 1 (undated)



equipment, food products, and electronic components.<sup>32</sup>

Financial support offered by the department consists of the return economy excursion airfare for the buyer to a maximum of \$1,500.<sup>33</sup>

Under the Trade Show Assistance Program, the extent of financial support is 50% of eligible costs, with total assistance not to exceed \$1,500. Eligible costs include trade show space rental, display design and construction, display shipment and storage, rentals of furniture/equipment, and labour to install and remove displays.<sup>34</sup> In 1974, tree fruits, pollution control equipment, furniture, and electronics were among the products displayed across Canada, the U.S.A. and Japan.<sup>35</sup>

British Columbia also administers a Market Development Program, designed to assist those firms that may not find it appropriate or possible to participate in trade missions. It assists companies in investigating new market opportunities, appointing local agents or distributors, or selling directly. Under the program, a company representative could be reimbursed for return economy excursion airfare, to a maximum of \$1,500, to undertake these

---

<sup>32</sup> 1974 Annual Report, p. 14

<sup>33</sup> Business Development Programs, p. 2

<sup>34</sup> Ibid., p. 1

<sup>35</sup> 1974 Annual Report, p. 4

activities.<sup>36</sup> In 1974, fourteen companies were assisted under this program and the products promoted included agricultural products, electronics, fashion wear, and forest equipment.<sup>37</sup> Assistance to a particular recipient is only granted once a year under any given program.

Although these are the major export programs, the branch is involved in a number of other export related activities. For example, the Technical Assistance Program aids companies in market feasibility studies, and special projects of the branch have included the opening of display homes by the British Columbia Council of Forest Industries in Tokyo.<sup>38</sup> Other branches of the department are also involved in trade matters. The Research and Analysis Branch compiles external trade reports and is also responsible for information on such activities as meetings with the federal Department of Industry, Trade and Commerce and GATT negotiations.<sup>39</sup> The British Columbia Development Corporation, among its other activities, provides management support services on market and export promotion.<sup>40</sup>

---

<sup>36</sup> Business Development Programs, p. 2

<sup>37</sup> 1974 Annual Report, p. 4

<sup>38</sup> Ibid., p. 5

<sup>39</sup> Ibid., p. 6

<sup>40</sup> Ibid., p. 13

It is not surprising that the Pacific Rim is considered a particularly important market area for British Columbia. A considerable potential is seen for the province's products in this area of the world, especially in forestry, fishing, boat building, agriculture, road building, and transportation. A special examination is being made of possible joint ventures with developing countries in the Pacific. In 1976, field trips were taken to Japan, Hong Kong, the Phillipines, Indonesia, Singapore, and Thailand, with many additional trips planned for 1977.<sup>41</sup>

With respect to trade missions from British Columbia, it is also important to note that the Vancouver Board of Trade administers a trade mission program which it considers to be very successful in promoting exports from the province. This is the twenty-fifth consecutive year in which the Board has visited other countries under its Annual Offshore Trade and Goodwill Missions. This year, Board members will visit Hong Kong, Singapore, Korea, and Japan. Last year, delegations went to Italy, West Germany and France. The Board attributes its success to its "no nonsense" approach, where foreign visits are based on strict business formats with detailed preparation.<sup>42</sup>

---

<sup>41</sup> B.C. Market News, British Columbia Department of Economic Development, Vol. 2, No. 8, December, 1976

<sup>42</sup> "World Markets Lure B.C. Trade", Financial Post, January 12, 1977, and correspondence received from the Vancouver Board of Trade.

### Alberta

A number of export services are offered by the Marketing Services Branch of the Alberta Department of Business Development and Tourism. The Alberta Export Agency also attempts to expand sales both in Canada and abroad, offering loan guarantees for approved export development programs, assisting exporters in locating financing, and underwriting initial risks associated with new market development.<sup>43</sup>

### Manitoba

The province's export programs are administered by an agency of the Department of Industry and Commerce, the Manitoba Trading Corporation (MANITRADE). It performs both the functions of a trading corporation and the function of promoting Manitoba's exports through such activities as trade-fairs, trade missions, and an incoming buyers program, the main aspects of which are summarized in Table 7. In addition, MANITRADE will investigate the market potential for products, present products to buyers, agents and distributors in selected market locations, and appoint and supervise agents or distributors. MANITRADE itself will act as an agent on a commission basis or act as an export merchant, making outright purchases of

---

<sup>43</sup> The Alberta Department of Business Development and Tourism was undergoing major organization changes at the time this study was conducted. It was indicated by department officials that publications outlining Alberta's present export programs were not yet available.

TABLE 7  
 MANITRADE PROGRAMS  
 APPLICABLE TO:

PROGRAM NAME	SITUATION	ELIGIBLE COSTS	REGIONS	PRODUCT	LIMITATIONS
1. Trade Fairs Group—Organized by MTC. Solo — Organized by applicant.	Exhibition at trade fairs other than Canadian sponsored exhibit sections.	Space and other specified costs.	Anywhere in the world, except Manitoba.	Any Manitoba product or pro- fessional service.	(a) Maximum two appear- ances in any one fair; (b) Maximum three fairs per year; (c) Assistance to each project not to exceed \$1,000 against eligible costs or 50% of total costs, whichever is the lesser.
2. Incoming Buyers.	introduction of potential buyers to Manitoba products or professional services.	Buyer's travel and accommoda- tion costs; three days maximum.	North America.	Any Manitoba product or pro- fessional service.	Market areas and timing selected by MTC.
3. Missions — Group.	Sales missions are organized by MTC. Attendance generally by invitation.	50% of travel and accommoda- tion costs.	Anywhere except Canada.	Any Manitoba product or pro- fessional service.	
4. Export of Professional Services.	Specified capital project.	50% of precon- tractual travel and accommoda- tion costs plus necessary con- sultants fee.	Anywhere except Canada.	Professional engineering, ar- chitectural, con- struction services, capital equip- ment.	(a) Repayable in full if applicant gains project contract; (b) Annual limits of three projects and total grants of \$5,000.

SOURCE: MANITRADE, Manitoba Trading Corporation

merchandise. Further activities include organizing consortia to seek contracts for capital projects, assisting Manitoba consultants in obtaining contracts abroad, arranging compensation (reciprocal or counter) trading between Manitoba and foreign countries, procuring materials from foreign sources, conducting export seminars, and providing an export service to provide information on such subjects as tariffs, insurance, and export documentation.<sup>44</sup>

MANITRADE was formed in 1974, replacing the eleven year old Manitoba Export Corporation. Its primary purpose was to "assist small manufacturers and private individuals through the many intricacies of attracting and securing export trade".<sup>45</sup> Thus, the emphasis was and still is on smaller businesses and, because the majority of Manitoba's commodity exports are handled by marketing boards and by the Department of Agriculture, manufactured goods are the type of exports concentrated upon.

MANITRADE's export sales performance has been fairly successful. To September, 1976, 260 sales were made in 29 countries.<sup>46</sup> Examples of sales include automotive parts, pollution control machines, medical electronic

---

<sup>44</sup> Helping Manitoba Business to Develop Exports, Manitoba Trading Corporation (undated)

<sup>45</sup> Manitoba Business Review, Manitoba Department of Industry and Commerce, Vol. 2, No. 7, September - October, 1976, p. 12

<sup>46</sup> Ibid.

equipment and production machinery to Venezuela, Mexico, Cuba, South Africa, Switzerland, Holland and China; a complete slaughterhouse to Panama; and bus washing equipment to Latin America. An area of potential strength is considered to be food processing, in recognition of the fact that food storage and distribution, feed manufacturing, and meat slaughtering and processing represent about 30% of Manitoba's economy. Consortium trading is another program that the province would like to further develop. In terms of geographic location, Latin America is considered to be MANITRADE's most successful market.<sup>47</sup> There are also some differences in the corporation's mode of operation in different parts of the world. In North America it acts solely as an agent, but in other locations there is the option of using MANITRADE as an export agent.<sup>48</sup>

### Ontario

Ontario has some of the most extensive export programs of the provinces, with primary responsibility being held by the Division of Trade in the Ministry of Industry and Tourism. This division consists of three branches: (1) the International Marketing Branch, (2) the Domestic Marketing Branch, and (3) the Trade Research Branch.

The International Marketing Branch is organized on the basis of three sections of geographic specialization:

---

<sup>47</sup> Ibid.

<sup>48</sup> Ibid.

(1) Western Hemisphere, (2) East and West Europe, and (3) the Pacific, Asia and Africa. The specific programs and activities offered by the branch are as follows:

- 1) Trade Missions
- 2) Manufacturing Abroad
- 3) Foreign Offices
- 4) Incoming Buyers Program
- 5) International Exhibition Program
- 6) Consortia
- 7) Forums and Conferences
- 8) Financial Advice.<sup>49</sup>

Participation in the Trade Mission Program is open to Ontario-based manufacturers who have an Ontario content of material and labour in excess of 75%. Assistance includes return economy airfare from Toronto to the destination of the mission, arrangement of a complete itinerary for each company, and guidance and assistance from the mission leader.<sup>50</sup> In 1974 there were forty trade missions, each one consisting of eight to ten companies. Fifty countries were visited, and the resulting sales estimates by the participating companies were in excess of \$21

---

<sup>49</sup> Trade Services, Division of Trade, Ontario Ministry of Industry and Tourism (undated)

<sup>50</sup> A Guide to Government Assistance Programs for Industry, Communication Division, Ontario Ministry of Industry and Tourism, May, 1976, p. 33



million.<sup>51</sup>

The Manufacturing Abroad Program is oriented towards assisting Ontario companies in the establishment of licencing agreements, joint ventures or branch plants where export from Ontario is not feasible. The Ministry's contribution involves return economy airfare for participation in a mission for this particular purpose. In 1975, fifteen companies established a total of sixteen licencing arrangements in fourteen countries.<sup>52</sup>

Foreign offices of the International Marketing Branch provide liaison in other countries with government agencies, industry associations, prospective buyers and agents, and Canadian Federal Trade Commissioners. There are fifteen such offices, located in Brussels, Frankfurt, Milan, Stockholm, Tokyo, Vienna, London, Mexico City, Sao Paulo, Boston, Chicago, Cleveland, Los Angeles, Minneapolis, and New York.<sup>53</sup>

The Incoming Buyers Program brings foreign buyers and agents to the province to meet Ontario businessmen and negotiate sales contracts. In 1975, the branch brought twenty-six buyers and agents to Ontario.<sup>54</sup>

---

<sup>51</sup> The Ontario Industry, Trade, and Tourism Review, Communications Division, Ontario Ministry of Industry and Tourism, May, 1976, p. 18

<sup>52</sup> Ibid., p. 19

<sup>53</sup> Trade Services

<sup>54</sup> Review, p. 19

The International Exhibitions Program has the same eligibility requirements as the Trade Missions Program, but the emphasis is on the introduction of new companies to international markets and on market penetration by companies which have just established representation in the country where the exhibition is being held. Assistance includes subsidizing the cost of shipment of products to the exhibition site, cost of space over and above a flat \$100 charge to each exhibitor, and the cost of publicizing products exhibited in the exhibition catalogue.<sup>55</sup> In 1975, the branch organized three exhibitions in the United Kingdom and one in Australia, with forty-five Ontario companies participating.<sup>56</sup>

The Forums and Conferences Program is concerned with the sponsorship of export seminars to assist Ontario Manufacturers on all aspects of exporting activity. In 1975, "Introduction to Exporting" seminars were held in London, Ottawa, Kitchener, Kingston, Hamilton and Toronto, with 320 companies attending. Three seminars oriented towards the techniques of exporting to specific geographic areas were also held in Toronto. These concerned the markets of Eastern Europe, South America and Middle Africa, and were attended by 256 companies. Other forums in 1975 included a conference on trading houses and a conference on

---

<sup>55</sup> Guide, p. 32

<sup>56</sup> Review, p. 19

manufacturing abroad.<sup>57</sup>

The remaining major programs of this branch include the Consortia Program, where Ontario manufacturers are encouraged to take part in consortia where they will promote successful marketing, and the Financial Advice Program, where Ontario companies requiring financial assistance in the export activities are guided to appropriate lending institutions or government agencies.

To carry out the various services and programs, the branch maintains a staff of sixteen consultants specializing in world markets. In 1975, the branch's consultants conducted over 2,400 consultations with Ontario companies.<sup>58</sup>

The other branch of the Division of Trade concerned with exports is the Trade Research Branch. There is both a Domestic Trade Analysis Branch and a Foreign Trade Analysis Branch within this larger branch. The latter prepares studies on foreign markets, analyzes market potential for Ontario exports, and examines economic and trade policies of other countries. To date, foreign market background studies have been prepared on sixty-nine countries. In 1975, a number of special studies were also undertaken, including such subject areas as the Canada-European Economic Community "Contractual Link", non-tariff barriers confronting Ontario exporters, and the

---

57 Ibid.

58 Ibid.

Ontario position on GATT.<sup>59</sup>

In addition to the major programs of the Ministry of Industry and Tourism, an Export Support Program is also administered by the Ontario Development Corporation, the Northern Ontario Development Corporation and the Eastern Ontario Development Corporation. Ontario based exporters are eligible for the following assistance, to a maximum of \$500,000:

- 1) Short-term financing of the production of goods for export against specific orders. Up to 75% of the order may be advanced.
- 2) Short-term financing for goods held in warehouse for export against specific orders. Up to 75% of the value may be advanced.
- 3) Medium-term financing (normally up to five years) of the sale of capital goods at the date of shipment. Up to 95% of the value less the down payment (normally at least 10%) may be advanced.
- 4) Short-term financing of the sale of consumer goods at the date of shipment. Up to 90% of the value may be advanced.<sup>60</sup>

#### Quebec

The major export assistance programs in Quebec are administered by the Department of Industry and Commerce.

---

<sup>59</sup> Ibid., p. 23

<sup>60</sup> Guide, p. 37

Table 8 provides a list of the major programs and a breakdown of expenditures for the last fiscal year. Where the department organizes and coordinates participation in trade fairs, part of the costs are covered for space reservation, construction of booths, decoration, transporting exhibits and samples, advertising and other items. When a firm participates individually in a trade show abroad, the department may contribute up to 30% of the costs involved. The department itself invites foreign buyers to visit the province, and part of the costs are covered for participants taking part in department organized trade missions. Additional programs include information on such subjects as tariffs, export techniques, and potential markets; the organization of lectures or seminars on trade matters; and organization of special technical missions to gather data on such topics as the marketing methods used by foreign competitors.<sup>61</sup>

Further assistance is available through the Department of Industry and Commerce Industrial Agreement Section, one objective of which is to give firms an international scope. An important part of this type of assistance is the industrial missions program, which brings together six to ten businessmen with the department to participate in business trips abroad. Although the trips may include trade shows or some of the activities involved in trade missions,

---

<sup>61</sup> Our Business is Getting You Business, Export Assistance Program, Quebec Department of Industry and Commerce. (undated)

TABLE 8

QUEBEC DEPARTMENT OF INDUSTRY AND COMMERCE  
USE OF FINANCIAL RESOURCES  
FOR EXPORT PROMOTION (EXCLUDING SALARIES)

<u>Promotion des exportations</u>	
<u>Activités</u>	<u>1976-77</u>
Expositions (incluant matériel)	\$276,700
Missions (ex)	86,000
Participations individuelles	20,000
Missions "Incoming"	15,000
Prêt-à-porter (Montréal-Mode)	75,000
Colloques et séminaires à l'exportation	10,000
Visites aux industriels du Québec	12,000
Projets spéciaux (Chaussures-Canada)	8,700
APEX Aide pour promouvoir l'exportation	<u>47,000</u>
Sous-totaux .....	\$550,400

---

SOURCE: Table provided by the Quebec Department of Industry and Commerce

they go further to include industrial agreements, the comparison of manufacturing techniques, or the evaluation of production machinery and equipment.<sup>62</sup>

---

<sup>62</sup> Industrial Agreements, Quebec Department of Industry and Commerce. Also see Accords Industriels, Division des Accords Industriels, Ministère de l'Industrie et du Commerce, Gouvernement du Québec, 1976

The Quebec Industrial Development Corporation also performs an export assistance function. All Quebec businesses which export manufactured goods are eligible for aid under this program, which takes three forms. The first type of assistance involves financing or loan guarantees, and is available to Quebec businesses which export consumer or capital goods and which are unable to obtain sufficient credit from banks. The second type of assistance is the assumption of part of the cost of short-term credit. To be eligible, a business must have annual sales of less than \$12 million or have at least 50% of its actual shareholders residing in Quebec. The third type of assistance is provided to Quebec-based suppliers setting up subsidiaries in foreign markets in order to develop a flow of exports. The financial contribution could be in the form of a term loan to the parent company or participation in the share capital of the foreign subsidiary.<sup>63</sup>

#### New Brunswick

New Brunswick has export programs concerning market identification, trade-fairs, technical missions, and most programs similar to those offered by PEMD at the federal level. In most cases, assistance to New Brunswick companies is considered when federal assistance does not apply or if it has been refused. An example is the provincial supplement to PEMD "B" (market identification). The

---

<sup>63</sup> Export Assistance, Export Assistance Division, Quebec Industrial Development Corporation (undated)

federal program does not apply to the United States, so the province has made provision to assist those exporters who wish to carry out market identification work in that country.<sup>64</sup>

The New Brunswick Government also provides a number of advisory services for exporters, including such subject areas as foreign tariffs, documentation requirements, pricing, and transportation requirements.<sup>65</sup>

#### Nova Scotia

Nova Scotia's export program, administered by the Marketing and Trade Development Division of the Department of Development, was established to complement the federal PEMD program and to offer assistance to Nova Scotia industries whose projects are not eligible for assistance under federal programs. There are four major areas of assistance available, the first being Trade Fairs and Exhibits. The department will cover costs for booth space, costs for display design, 50% of return economy airfare for company personnel, up to \$50 per day expenses for one person and up to \$30 per day expenses for a second company representative. The second program is Market Familiarization. Financial support by the department includes 50% of return economy airfare for approved company personnel,

---

<sup>64</sup> Based on information received from the New Brunswick Department of Commerce and Development.

<sup>65</sup> Based on information received from the New Brunswick Department of Commerce and Development.



and the same level of expenses for two company representatives as in the above program. The third program is Market Education, where businessmen attend approved marketing courses and seminars. Fifty percent of return economy airfare is covered, as well as 50% of tuition, registration and textbook costs, and up to \$25 per day expenses. The fourth program, Incoming Buyers, reimburses the return economy airfare for one foreign buyer to visit the province.<sup>66</sup>

#### Prince Edward Island

Prince Edward Island does not have a formal export promotion program, but a limited amount of export assistance is provided by the province's Market Development Centre. In 1975, the Centre brought in Trade Commissioners and Assistant Trade Commissioners from thirty countries, with the purpose of introducing them to major food processors and manufacturers in the province. A survey was also conducted of Canadian export trading houses, with a view to selecting the most appropriate ones for Prince Edward Island's needs.<sup>67</sup>

Specific export activities have included shipping certified seed potatoes to North African countries and Brazil, and seed potato variety trials in Egypt, Libya,

---

<sup>66</sup> Marketing Assistance Program, Marketing and Trade Development Division, Nova Scotia Department of Development (undated)

<sup>67</sup> Market Development Centre, Annual Report, 1975, Prince Edward Island Market Development Centre

and the Philippines; a study of seed potato marketing agencies and systems in European countries; assistance to the Vegetable Growers Co-op in their efforts to obtain a foothold in the Bermuda market; and the development of new markets for lobsters, oysters, mackerel, and smelts.<sup>68</sup>

#### Newfoundland

Newfoundland does not have a formal export promotion program, but the government is planning the establishment of such a program for 1977. Various export activities are being performed already, including participation in trade-fairs and missions, advertising in foreign markets, sponsoring conferences, and conducting research on foreign markets.<sup>69</sup>

#### c) Comparison of Provincial Export Programs

##### Background Characteristics

Saskatchewan established a trade development function in the Department of Industry and Commerce in 1966. As indicated in Table 9, many provinces developed export programs in the mid-1960's, although some provinces indicated much later dates. This does not necessarily mean that the provinces were not involved in export activities before the indicated years, but rather that the indicated years were when the respective programs were formally

---

<sup>68</sup> Ibid.

<sup>69</sup> Based on information received from the Newfoundland Department of Industrial Development.

TABLE 9

THE YEAR IN WHICH FORMAL EXPORT PROMOTION  
PROGRAMS WERE INITIATED BY PROVINCIAL GOVERNMENTS

<u>Province</u>	<u>Year</u>
B.C.	1973
Alta.	1973
SASK.	1966
Man.	1963
Ont.	1961
Que.	1965
N.B.	1964
N.S.	1972
P.E.I.	*
Newf.	1977 **

\* No formal program in operation

\*\* Initiation of program planned for 1977

initiated.

Table 4 has already outlined which of the listed export activities are presently performed by each province.

With respect to the export activities that have been discontinued, Table 10 indicates that two other provinces besides Saskatchewan have discontinued overseas offices. Saskatchewan is the only province that has discontinued trade missions.

There is some pattern to the responses with respect to the importance of various export promotion activities (see Table 11). Providing market information and



TABLE 11

THE RELATIVE IMPORTANCE OF VARIOUS EXPORT PROMOTION  
ACTIVITIES THAT MIGHT BE PERFORMED BY GOVERNMENTS,  
AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS

(1 - Very important, 2 - Fairly important, 3 - Not important)

<u>Export Activities</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
1. Operating promotional offices overseas	3	2	3	3	na.	2	2	2		3
2. Organizing trade missions to foreign markets	1	1	1	3	1	2	1	1		2
3. Exhibits or displays in international trade-fairs or shows	2	1	1	2	2	2	2	1		2
4. Advertising in overseas markets	3	3	3	3	3	3	3	2		2
5. Provide market information on overseas market areas	1	1	1	2	1	1	1	1		2
6. Consultation about foreign trade possibilities	1	2	1	2	1	2	2	1		2
7. Circulate regular enquiries received from abroad	2	3	2	3	2	2	1	2		2
8. Assistance in performing mechanics of exporting (ie. documentation)	2	3	2	1	2	1	1	2		2
9. Develop pamphlets and other printed material to aid businessmen	2	3	1	3	2	2	2	3		2
10. Maintain permanent file on trade leads	2	2	2	3	3	1	2	3		2
11. Establish and publish directory of firms in international business	1	2	3	3	3	2	2	3		2
12. Sponsor international business conferences	2	2	2	2	2	2	2	3		2
13. Perform research projects on foreign markets	3	2	1	2	2	1	1	1		2



In most provinces 76% - 100% of export expenditures went to providing services. Three of the provinces, including Saskatchewan, responded that a greater amount of their export expenditures was used to provide information to businessmen.

TABLE 13

PERCENTAGE OF EXPORT PROMOTION EXPENDITURES  
DEVOTED TO PROVIDING ACTUAL SERVICES, AS  
OPPOSED TO INFORMING BUSINESSMEN OF THE  
SERVICES AVAILABLE

Expenditures devoted to actual services	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
0 - 50%										
51 - 75%		x	x		x*					
76 - 100%	x			x		x	x	x		

\* Excluding salaries. The 51% - 75% range is indicated including salaries.

On many issues, Saskatchewan's response was similar to that of most other provinces. On the subject of the adequacy of provincial government export promotion resources, the typical response was that the number of personnel was somewhat insufficient and the amount of funds was somewhat inadequate. Concerning activities that would be expanded if additional funds were made available, seven provinces, including Saskatchewan, indicated that trade shows would

TABLE 14

THE ADEQUACY OF PROVINCIAL GOVERNMENT RESOURCES  
FOR EXPORT PROMOTION, AS PERCEIVED  
BY PROVINCIAL GOVERNMENT OFFICIALS

<u>Number of Personnel</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Sufficient number				x			x*			
Somewhat insufficient number	x	x	x		x	x		x		
Numbers are seriously insufficient										x
 <u>Adequacy of Funds</u>										
Amount is adequate	x			x						
Amount is somewhat inadequate		x	x			x	x			
Amount is seriously inadequate					x			x		x

\* To work with manufacturing and processing sectors only.

receive top priority. After this first choice, there is no clear pattern in Table 15. Saskatchewan's second selection was also in the top three for four other provinces, and Saskatchewan's third choice was also in the top three for five other provinces.

With respect to activities that would likely be reduced in scope, the only exceptional response from Saskatchewan is that consultation about foreign trade possibilities was selected while this activity was not



TABLE 15

THE THREE PROVINCIAL EXPORT PROMOTION ACTIVITIES  
(IN RANK ORDER) THAT WOULD RECEIVE GREATER  
ATTENTION IF ADDITIONAL FUNDS WERE MADE AVAILABLE;  
AND THE THREE ACTIVITIES LIKELY TO BE REDUCED IN  
SCOPE IF THERE WAS A REDUCTION IN AVAILABLE FUNDS,  
AS PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS

(a - activities to receive greater attention  
b - activities likely to be reduced in scope)

<u>Export Activities</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
1. Operating promotional offices overseas	1b								1a	
2. Organizing trade missions to foreign markets		2a 3b	3a	1b		3b	1a	1a	3a	1a
3. Exhibits or displays in international trade-fairs or shows	3b	1a	1a	1a 2b	1a	1b	2a	1a	2a	1a
4. Advertising in overseas markets		1b			1b	2b	1b			
5. Provide market information on overseas market areas	2a				1b	3a		1a		
6. Consultation about foreign trade possibilities	3a		1b							
7. Circulate regular enquiries received from abroad										
8. Assistance in performing mechanics of exporting (ie. documentation)	1a	3a		2a	1a	2a				1a
9. Develop pamphlets and other printed material to aid businessmen			2a					1b		1b
10. Maintain permanent file on trade leads							2b	1b		
11. Establish and publish directory of firms in international business								1b		
12. Sponsor international business conferences			2b	3b		1a		3b		1b
13. Perform research projects on foreign markets	2b		2a	3a 3b	1a 1b	1a	3a	1a		1b

indicated by any other provinces. It was further explained by Saskatchewan officials that this would result from reduced staff time available for consultation in the event of a reduction in funds.

With respect to the relative importance of export, as opposed to other forms of international business, Table 16 indicates varying responses among the provinces. It is difficult to make direct comparisons here, as some respondents indicated that their department did not have responsibility for all of the activities listed, while some provinces indicated their commitment of resources included other areas than only those listed and that it would be difficult to isolate "international" expenditures.

Saskatchewan indicated typical responses in terms of the size of firm the export program is intended to aid. Table 17 indicates that six of the nine respondents emphasized the 11 - 50 employee range as the size of firm given first priority. It is also interesting to note that most provinces indicated the 51 - 250 employee range as the second priority but then gave third priority to the small 1 - 10 employee range. This seems to support earlier suggestions that provincial export programs are generally intended to aid small- to medium-sized businesses.

Table 18 indicates that all respondents rated

TABLE 16

THE RELATIVE IMPORTANCE OF VARIOUS INTERNATIONAL BUSINESS ACTIVITIES TO PROVINCIAL GOVERNMENTS, AS MEASURED BY THE PERCENTAGE OF TOTAL RESOURCES COMMITTED

<u>International Business Activities</u>	<u>Percentage of total international business resources</u>									
	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Exports	75	20	35	20	30	40	45	100		
Imports	5	20			5		5			
Outward investment	5				5		5			
Inward investment	15	60	65	10	30	10	45			
Other					* 65	** 30	50			

\* Capital investment by local firms inside the province

\*\* Capital investment - domestic industry

TABLE 17

THE SIZE OF FIRM THE PROVINCE'S EXPORT PROGRAM IS PRIMARILY DESIGNED TO AID (IN RANK ORDER)

<u>Size of firm (No. of Employees)</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
1 - 10	3	3	3	3	2	4	3	2		3
11 - 50	1	1	1	1	1	2	1	2		2
51 - 250	2	2	2	2	1	1	2	1		1
251 - 1000	4	4	4		3	3	4	1		4
over 1000	5	5			4	5	5	1		5

TABLE 18

THE TYPES OF FIRMS THE PROVINCES' EXPORT PROGRAMS  
ARE PRIMARILY DESIGNED TO AID (IN RANK ORDER)

<u>Type of Firm</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Manufacturers	1	1	1	1	1	1	1	1		1
Processors	2	2	2	2	2		2	1		2
Agriculture (primary, unprocessed)				3	3			2		
Mining										
Domestic Middlemen										
Companies selling services	3		3			2	3	2		
International marketing intermediaries										
Other										3*

\* Consulting industry

manufacturing as the type of firm given top priority. Nova Scotia gave equal weight to both manufacturing and processing. Eight of the nine respondents indicated processing as the second choice, if Nova Scotia, which rated manufacturing and processing equally, is included. After these two choices there is a less recognizable pattern in responses, although companies selling services and agriculture were chosen by a number of provinces. It should be noted that, while some provinces gave a rating to agriculture, provinces which we might expect to include agriculture, such as Saskatchewan and Alberta, did not. Some provinces, including Saskatchewan and Alberta, also have an export program administered by their Departments of Agriculture, while in some provinces the Department of Agriculture only provides a support service to the industry department in the area of exports. It should be kept in mind that these responses were made by officials of the respective industry departments.

#### Government - Business Relations

Respondents had similar views as to the importance of methods of informing businessmen of government export assistance. A method worthy of special note is newspaper coverage, which received a wide range of ratings (see Table 19).

No respondents indicated disinterest by businessmen of provincial export programs. The responses were quite evenly dispersed among moderate, substantial and very great interest and use (see Table 20).

TABLE 19

THE RELATIVE IMPORTANCE OF VARIOUS METHODS  
OF INFORMING BUSINESSMEN OF THE GOVERNMENT  
EXPORT ASSISTANCE THAT IS AVAILABLE, AS  
PERCEIVED BY PROVINCIAL GOVERNMENT OFFICIALS  
(IN RANK ORDER)

<u>Methods of Informing Businessmen</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Direct personal contact with businessmen	1	1	1	1	1	1	1	1	1	1
Direct correspondence with business firms	2	1	1	1	2	2	1	2	1	1
Conferences, meetings and seminars	2	2	2	2	2	2	2	1	2	2
Talks before business and service groups	2	2	2	2	2	2	2	2	2	2
Newspaper coverage	2	2	3	3	3	1	2	1		3
Reports in Agency publica- tions (eg. monthly newsletter)	2	2	2	3	2	2	2		2	2
Press releases	3	2	2	3	3	2	2	1	1	3
Radio and television appearances	3	3	3	3	3	3	2	2	1	3

TABLE 20

BUSINESS INTEREST IN AND USE OF PROVINCIAL  
EXPORT PROGRAMS, AS PERCEIVED BY  
PROVINCIAL GOVERNMENT OFFICIALS

<u>Level of Interest and Use</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Disinterest and little use										
Moderate interest and use			x	x			x			
Substantial interest and use		x				x		x		
Very great interest and use	x				x					

Of the resources required for successful exporting, Table 21 indicates some pattern to the responses, but also a considerable amount of variation in the perceptions of respondents. The resource that the Saskatchewan response considered top priority was also considered first choice by two other provinces, and it was among the top three chosen by all but one of the responding provinces. The only major difference with respect to the Saskatchewan response is that all of the other provinces included financial resources in their top three choices.

Inter-Governmental Relations

The activities where Saskatchewan co-operates with the federal government were generally those activities indicated by other provinces (see Table 22). The only major exception where Saskatchewan does not co-operate

TABLE 21

RESOURCES REQUIRED FOR SUCCESSFUL  
EXPORTING, AS PERCEIVED BY PROVINCIAL  
GOVERNMENT OFFICIALS (IN RANK ORDER)

<u>Resources</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Financial Resources	3	2	2	1	2	1	2	2	2	2
Production Resources			1					1		
Top Management Time	1	2	3							
Knowledge in Export Management	2	1	1	3	2	3	3	3	1	
Sales Force						1				
Research and Development			3	3				1	3	3
Others							2			

is trade missions. Saskatchewan is the only province that co-operates with the federal government on the development of pamphlets and printed material.

Almost all of the responding provinces co-operate with the federal Department of Industry, Trade and Commerce, and four provinces, including Saskatchewan, co-operate with CIDA (see Table 23).

Table 24 does not seem to have a recognizable pattern, suggesting that there are no major federal export programs that an overwhelming number of provinces consider either very effective or not effective. The only program not to receive any "not effective" response is the EDC. PEMD "E" received the most "not effective" responses, and PEMD "B" received the most "very important" responses.



TABLE 22

PROVINCIAL GOVERNMENT CO-OPERATION WITH THE  
FEDERAL GOVERNMENT ON EXPORT PROMOTION  
AS INDICATED BY PROVINCIAL GOVERNMENT OFFICIALS

<u>Export Activities</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
1. Operating promotional offices overseas						x				
2. Organizing trade missions to foreign markets	x	x		x	x	x	x	x		x
3. Exhibits or displays in international trade-fairs or shows	x	x	x	x		x		x		x
4. Advertising in overseas markets										
5. Provide market information on overseas market areas	x		x	x		x	x	x		x
6. Consultation about foreign trade possibilities	x		x	x	x	x	x	x		x
7. Circulate regular enquiries received from abroad	x	x					x			x
8. Assistance in performing mechanics of exporting (ie. documentation)					x					
9. Develop pamphlets and other printed material to aid businessmen										
10. Maintain permanent file on trade leads										
11. Establish and publish directory of firms in international business										
12. Sponsor international business conferences	x	x	x	x	x					x
13. Perform research projects on foreign markets				x	x			x		

TABLE 23

PROVINCIAL CO-OPERATION ON EXPORT PROMOTION  
WITH SPECIFIC FEDERAL AGENCIES

<u>Federal Agencies</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Dept. of Industry, Trade and Commerce	x	x	x	x	x	x	x	x		x
Dept. of External Affairs			x							
Dept. of Agriculture										
CIDA			x	x	x		x			
Others										
None										

TABLE 24

THE EFFECTIVENESS OF FEDERAL GOVERNMENT  
EXPORT PROGRAMS, AS PERCEIVED BY  
PROVINCIAL GOVERNMENT OFFICIALS

(0 - Not sure, 1 - Very effective.  
2 - Fairly effective, 3 - Not effective)

<u>Federal Programs</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
Trade Missions	3	2	0	2	2	0	2			2
PEMD "A"	2	3	0	0	2	2	3	2		3
PEMD "B"	2	1	2	0	1	3	1	2		3
PEMD "C"	2	1	2	2	2	2	2	2		3
PEMD "D"	2	0	1	2	2	0	1	2		3
PEMD "E"	1	0	3	3	3	0	1	2		3
Export Development Corporation	2	2	0	2	2	1	2	2		1

Saskatchewan, along with the other prairie provinces, indicated co-operation with three other provinces on export promotion (see Table 25). Saskatchewan co-operates with other provinces on some but not all of the activities reported by most other provinces (see Table 26).

TABLE 25

PROVINCIAL GOVERNMENT CO-OPERATION ON  
EXPORT PROMOTION WITH OTHER PROVINCIAL GOVERNMENTS

<u>Number of Other Provincial Governments</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
One other province						x			x	
Two other provinces							x	x		
Three other provinces		x	x	x						
More than three other provinces	x				x					
None										x

With respect to co-operation with private agencies, Table 27 indicates that Boards of Trade received the greatest response. Saskatchewan, unlike most other provinces, did not report co-operation with financial institutions, and Saskatchewan was the only province to indicate co-operation with agricultural groups.

TABLE 26

PROVINCIAL GOVERNMENT CO-OPERATION  
WITH OTHER PROVINCIAL GOVERNMENTS  
ON SPECIFIC EXPORT PROMOTION ACTIVITIES  
AS INDICATED BY PROVINCIAL GOVERNMENT OFFICIALS

<u>Export Activities</u>	B.C.	Alta.	SASK.	Man.	Ont.	Que.	N.B.	N.S.	P.E.I.	Newf.
1. General information exchange	x	x		x	x	x				
2. Interchange of publications	x	x			x	x				
3. Interchange of trade mission information	x			x	x	x				
4. Organizing joint trade missions to foreign markets with one or more other provinces	x		x	x						
5. Sharing exhibits or displays in international trade-fairs and shows with one or more other provinces			x	x						
6. Sharing advertising in overseas markets with one or more other provinces										
7. Providing market information on overseas market areas to one or more other provinces	x				x					
8. Formal consultation with officials from other provincial programs about foreign trade possibilities	x	x						x		
9. Cosponsoring with other provinces international business conferences, seminars, etc., for businessmen	x		x	x				x	x	
10. Other important forms of assistance								x		



## V. CONCLUSIONS AND LIMITATIONS

### 1. Conclusions

The data obtained in this study indicates that the general thrust of the Saskatchewan export program is similar to that of most other provinces. With reference to the questionnaire, the responses from Saskatchewan were, with some exceptions, generally in line with the majority of responses from the other provinces. The aspects of the Saskatchewan program that were less typical concern the extent of available export assistance, with two areas being particularly worthy of note - the effects of budgetary restraint and the program's relationship to federal export assistance.

Although most provinces have been faced with recent budgetary restraint, the available data suggested that, with respect to trade development, Saskatchewan may have been particularly affected. The 1976 cutback of the Aid to Trade program curtailed the international operations of one of the most significant trade programs, and questionnaire responses indicated Saskatchewan as the only province that has discontinued specific export activities primarily due to a reduction in available resources. Of the provinces actively engaged in export promotion, Saskatchewan presently has one of the smaller programs. An examination of the available data suggested that the primary reason for this is the limitation of available

resources rather than a perception on the part of government officials that the scope of the present program is sufficient.

The limitation of resources has also affected the relationship between federal and provincial programs. Since the cut in the Aid to Trade program, the emphasis of Saskatchewan programs has been to complement and supplement federal efforts rather than to duplicate their services. This was also the main thrust of promotional efforts prior to budget restraint that affected Aid to Trade. As pointed out earlier, the provincial government cautioned that, "...if your project concerns foreign markets only, we suggest that you apply first to the federal government".<sup>1</sup>

A similar philosophy was also evident in some of the smaller provinces, where the primary objective of provincial involvement in export promotion is to fill a gap that is left by the federal government. New Brunswick and Nova Scotia particularly emphasize this approach. The federal PEMD "B" program, for example, applies to countries other than Canada and the United States, so the programs of these provinces offer assistance similar to that provided under PEMD "B" but restrict its applicability to those areas omitted by the federal government.

---

<sup>1</sup> Aid to Trade, Saskatchewan Department of Industry and Commerce, undated.

Saskatchewan has taken a somewhat different approach than New Brunswick or Nova Scotia, although some aspects of their philosophy are also evident. Until the recent Aid to Trade restraint, the Saskatchewan Government offered assistance programs that were similar to those available at the federal level. In general, the provincial programs were most appropriate for businesses that were unable to obtain federal assistance. For example, the application procedure for comparable types of assistance was much more complicated and time-consuming at the federal level. Thus, if an exporter wished to participate in a trade-fair at very short notice, he was more likely to acquire provincial rather than federal aid.

However, it is important to emphasize that the Saskatchewan Government "suggested" that firms first apply to the federal government. In New Brunswick and Nova Scotia, provincial assistance is contingent upon the applying firm being refused aid, or deemed ineligible, by federal agencies.

A further difference between Saskatchewan and the two provinces mentioned above was that the reduction in Aid to Trade has left a gap in assistance presently available to Saskatchewan exporters. Market identification is handled by PEMD "B" for countries outside Canada and the United States, and Aid to Trade still covers the domestic market. However, at the present time there is no provision for market identification assistance in Saskatchewan's



largest export market - the United States. This is not to say that there is no market identification work being done in the U.S., but rather that there is no formal on-going program that businesses can apply to for assistance.<sup>2</sup>

In comparing Saskatchewan with other governments, it is useful to note the status of the Saskatchewan Trading Corporation. It is especially interesting to compare SASKTRADE with the provincial trading corporation in neighboring Manitoba. MANITRADE not only performs the normal functions of a trading company, but it also has responsibility for most provincial government export promotion programs. The trend in Saskatchewan, on the other hand, has been for SASKTRADE to become more of a "business only" trading company, leaving most of the promotional programs and free government services to the relevant government departments.<sup>3</sup> Another difference is that MANITRADE concentrates on manufacturing and processing industries while SASKTRADE emphasizes primary agricultural products.

It is beyond the scope of this study to conclude whether the "specialist" approach of SASKTRADE is more or

---

<sup>2</sup> Saskatchewan Government officials have indicated that a program may soon be established to do the work of PEMD "B" in the United States, thereby filling this particular gap.

<sup>3</sup> This trend was indicated in discussions with Saskatchewan Government officials.

less appropriate or effective than the "all inclusive" approach of MANITRADE. There are undoubtedly both benefits and drawbacks in having export services centralized in one agency or decentralized in various departments and agencies.

## 2. Limitations

This study relied upon government documents as a major source of data. Unfortunately, many of these documents are undated, making it difficult to determine whether the programs described were in fact still in operation. A further limitation resulted from the fact that some provinces had less published information available on export programs than did others. A notable example is that of Alberta. Questionnaire results indicated that this province is very active in export promotion but documents were not available because the responsible department was in the process of a major re-organization.

An additional limitation resulted from the questionnaire responses being those of individual government officials. Questionnaires were sent to the Deputy Minister's office of each relevant provincial department and this office appointed the appropriate respondent. Although all of the respondents were provincial government officials who were familiar with this subject, the attitudes and perceptions contained in responses remain those of individuals.

## VI. SUMMARY AND IMPLICATIONS FOR FURTHER RESEARCH

### 1. Summary

Results from the study indicate that the extent of available export assistance offered by the Saskatchewan Government is generally more limited than the assistance available in most other provinces. The programs that are available in Saskatchewan are, for the most part, similar in nature to the programs offered by most other provincial governments.

The general thrust of Saskatchewan export programs is to complement existing efforts at the federal level. However, the cutback of the international aspect of the Aid to Trade program has created a significant gap in the assistance available to Saskatchewan exporters. Federal programs often apply only to areas outside Canada and the United States. While provinces such as New Brunswick and Nova Scotia have established programs specifically to deal with promotion in the United States, Saskatchewan has not as yet taken this step. However, indications are that additional export aid with respect to the United States has been considered by the Saskatchewan Government in an attempt to eliminate this gap.

### 2. Implications for Further Research

There are other aspects of a comparative evaluation that would be useful in assessing provincial export programs. One useful approach would be to assess actual

export performance in terms of promotional effort. However, for the following reasons, such an assessment was considered beyond the scope of this particular study. First, it would be misleading to judge the effectiveness of a province's export program in terms of total exports from that province. In many provinces, including Saskatchewan, the primary purpose of most export programs is to assist smaller businesses and those businesses that do not have the capacity to conduct promotional work on their own. In the case of Saskatchewan, government export assistance is not intended to affect the major exporting industries. Wheat, as well as a portion of other grains, is exported through the Canadian Wheat Board; potash is marketed through the industry organization, Canpotex; and many of the larger companies conduct their own export development programs. In 1974, 89% of Saskatchewan exports consisted of grains, oilseeds, crude oil and potash, so an examination of total export figures would tell very little about the success of provincial government promotional efforts. In order to utilize trade figures in this kind of assessment, it would be essential to use a breakdown of exports in particular categories rather than aggregate figures.

The second reason involves the availability and reliability of provincial export statistics. Statistics Canada only indicates provincial exports by "Exports by Province of Lading":

Export sales by province of lading indicates the province in which the goods were first laden aboard a carrier for export, which may not in all cases represent the province in which the goods were grown, extracted, or manufactured.<sup>1</sup>

This method of presenting trade figures has particularly significant consequences for an inland province like Saskatchewan where goods often leave the province in order to be exported but are not necessarily "laden aboard a carrier for export" within the province. Statistics Canada recognizes that this is a problem for individual provinces, but it does not go beyond this provincial breakdown because its concern is primarily exports from Canada as a whole rather than from individual provinces.<sup>2</sup>

The Saskatchewan Government sometimes compiles its own statistical estimates in cases where this type of problem exists with federal statistics. Consequently, the export figures provided by provincial sources could be considerably different from those obtained from Statistics Canada. For example, The Saskatchewan Bureau of Statistics estimated Saskatchewan's 1974 exports to be in excess of \$2.1 billion, while Statistics Canada's "Exports by Province of Lading" indicated Saskatchewan's total exports to be slightly less than \$830 million.<sup>3</sup>

---

<sup>1</sup> Exports by Countries, Statistics Canada, External Trade Division, 65-003

<sup>2</sup> Indicated in discussions with Statistics Canada officials.

<sup>3</sup> Saskatchewan Economic Review, 1974, Saskatchewan Bureau of Statistics, Statistics Canada, 65-003

Comparison of trade statistics among provinces, using other than Statistics Canada sources, poses additional problems. Some provinces quote Statistics Canada as the source of their export figures, but some present trade figures in various government documents without indicating the source. Ontario, for example, uses Statistics Canada figures in its Ministry of Industry and Tourism Annual Review. It indicated Ontario's domestic exports in 1974 to be slightly under \$12 billion, an amount which is very close to that indicated by Statistics Canada.<sup>4</sup> Taking into consideration the differences in the Ontario and the Saskatchewan method of arriving at provincial export figures, the question arises as to what amount of Saskatchewan exports, for example, are also indicated as Ontario exports because Saskatchewan goods may have been "laden aboard a carrier for export" at the Lakehead.

It was indicated at the beginning of this study that a comparison of the export programs of the various governments is only one aspect in attempting to evaluate Saskatchewan's programs. Other aspects would include an assessment of the programs in terms of the extent to which they meet the needs of Saskatchewan exporters and an

---

<sup>4</sup> According to Statistics Canada, "Domestic Exports" includes goods which are wholly produced in Canada and goods previously included in import statistics which have since been changed in form by further processing and then exported. "Re-exports" includes goods previously included in imports which are exported in the same form as when imported. "Total Exports" include both domestic exports and re-exports.

assessment of the actual export performance in terms of the promotional effort. The present study, although providing an important first step for a more comprehensive evaluation, does not contain sufficient data to formulate conclusions on the appropriateness or effectiveness of the program. The available data can only provide an overview of the programs in various governments and attempt to place the Saskatchewan program in the larger Canadian context. Further research and a more extensive analysis will be necessary to utilize these data in such an appraisal.

APPENDIX A

QUESTIONNAIRE SENT TO DEPUTY MINISTERS  
OF PROVINCIAL INDUSTRY DEPARTMENTS

COLLEGE OF COMMERCE

UNIVERSITY OF SASKATCHEWAN

Project on

THE SASKATCHEWAN GOVERNMENT  
EXPORT PROMOTION PROGRAM

QUESTIONNAIRE FORM #1

(Provincial Departments of Industry)

Return copy of completed form (self-addressed envelope provided) to:

Professor Richard C. Burke  
College of Commerce  
University of Saskatchewan  
Saskatoon, Saskatchewan  
S7N 0W0

Submitted by:  
Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## INTRODUCTION AND RESEARCH OBJECTIVES

The attached questionnaire concerns the first phase of a major research project aimed at expanding the present understanding of business-government co-operation in the export promotion field by examining, primarily, the role played by the Saskatchewan Provincial Government in this area. The overall objectives of this study are as follows:

- (1) to determine the scope of the Saskatchewan export promotion program;
- (2) to compare the Saskatchewan program with programs in other provinces;
- (3) to determine how the Saskatchewan program compares with, differs from, or complements the federal export program;
- (4) to attempt to measure the effectiveness of the current program in meeting the needs of Saskatchewan exporters and potential exporters. Of particular interest are:
  - (a) the level of awareness of the Saskatchewan Government Export Promotion Program,
  - (b) the level of its utilization,
  - (c) exporters' and non-exporters' attitudes towards the effectiveness of the programs in meeting their needs.
- (5) to seek suggestions from business executives and government officials and to draw conclusions as to how improvements can be made to the current program (or what new services should be offered) in order to make it more effective.

A secondary purpose is to gather information on other important related issues that may arise during the course of the investigation.

The first phase of this study involves both a comparison of the Saskatchewan Program to the programs of other provinces and a general assessment of the extent of export promotion activity at the provincial level across Canada. In connection with this aspect, short questionnaires are being sent to relevant government departments (e.g. departments of industry, agriculture) within each province in order to collect data on their respective export programs. The attached questionnaire is focussed on provincial industry departments.

Most of the questions contained in this questionnaire are of the type that cannot readily be obtained from published sources. Some are of an attitudinal nature, requiring a personal response from a government official involved in the export promotion field.

## INSTRUCTIONS

Please complete the attached questionnaire to the best of your ability. If information with respect to a particular question is either not available or not applicable to your provincial program, place "N/A" beside the question. If you regard any of the information which you have provided as confidential, please indicate this by placing a "c" beside the question. Requests for confidentiality will be strictly observed.

If you or your department would like a copy of the completed study, please enter below the name and address of the person to whom it should be sent. Expected date of completion for the project is September, 1977.

Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Thank you very much for your co-operation. It would be greatly appreciated if you could return the questionnaire in the attached self-addressed envelope as soon as possible.

Sincerely,

Richard Burke, Ph.D.  
Associate Professor of Accounting

1

1. In what year did your provincial government formally initiate an export promotion program?

\_\_\_\_\_ Year

\_\_\_\_\_ No formal export promotion program in operation.

2. About what percentage of your provincial government's export promotion expenditures is directed toward firms already engaged in exporting and toward firms not yet exporting?

Percentage of Export  
Promotion Expenditures

\_\_\_\_\_ % Directed toward firms already exporting.  
\_\_\_\_\_ % Directed toward firms not yet exporting  
100%

3. Toward what size of firm is your province's export promotion program primarily directed? Please rank them in order of decreasing importance (for example, place "1" beside the size of firm the program is primarily directed towards, "2" beside the size of firm receiving the second greatest emphasis, etc.).

\_\_\_\_\_ 1 - 10 employees  
\_\_\_\_\_ 11 - 50 "  
\_\_\_\_\_ 51 - 250 "  
\_\_\_\_\_ 251 - 1,000 "  
\_\_\_\_\_ Over 1,000 "

4. Towards which three of the following types of business firms is your province's export promotion program primarily directed? Please rank them in order of decreasing importance. (For example, place "1" beside the type of firm receiving the greatest attention, "2" beside the type of firm receiving the second greatest attention, etc.)

\_\_\_\_\_ Manufacturers  
\_\_\_\_\_ Processors  
\_\_\_\_\_ Agriculture (primary products - unprocessed)  
\_\_\_\_\_ Mining  
\_\_\_\_\_ Domestic Middlemen (for example, wholesalers, retailers)  
\_\_\_\_\_ Companies selling services  
\_\_\_\_\_ International marketing intermediaries  
\_\_\_\_\_ Other (please specify if significant) \_\_\_\_\_

... 2

5. Of the following resources required by business firms for successful exporting, which three do you consider to be in need of further development among firms in your province? Please rank the three resources in order of decreasing importance. (For example, place "1" beside the resource in need of the most development, etc.)

Financial resources  
 Production resources  
 Top management time  
 Knowledge in export management  
 Sales force  
 Research and development  
 Others (please specify if significant) \_\_\_\_\_

6. Please indicate what you consider to be the importance of the following methods of informing businessmen of the government export assistance that is available. (Please check in the appropriate spaces.)

<u>Methods of Informing Businessmen</u>	<u>1</u>	<u>2</u>	<u>3</u>
	Very Important	Fairly Important	Not Important
Direct personal contact with businessmen	_____	_____	_____
Direct correspondence with business firms	_____	_____	_____
Conferences, meetings, and seminars	_____	_____	_____
Talks before business and service groups	_____	_____	_____
Newspaper coverage	_____	_____	_____
Reports in agency publications (e.g. monthly newsletter)	_____	_____	_____
Press releases	_____	_____	_____
Radio and television appearances	_____	_____	_____

7. What has generally been the reaction of businessmen to attempts to encourage them to use your provincial government's export assistance programs? (Please check one.)

Disinterest and little use.  
 Moderate interest and use.  
 Substantial interest and use.  
 Very great interest and use.

8. What is the number of full-time provincial government employees presently engaged in export promotion in your province?

\_\_\_\_\_

9. What amount of financial resources did your provincial government commit to export promotion during the last fiscal year? (Please check one.)

Less than \$ 25,000  
 \$ 25,000 - \$ 49,999  
 \$ 50,000 - \$ 99,999  
 \$100,000 - \$249,999  
 \$250,000 - \$499,999  
 \$500,000 and above

10. What percentage of expenditures on export promotion in that last fiscal year was devoted to providing actual services, as opposed to informing businessmen of the services available? (Please check one.)

Expenditures devoted to  
actual services

0 - 50 percent  
 51 - 75 percent  
 76 - 100 percent

11. How adequate do you consider your provincial government's resources to be in your export promotion program? (Please check one in each section.)

Number of Personnel:

Sufficient number  
 Somewhat insufficient number  
 Numbers are seriously insufficient

Adequacy of Funds:

Amount is adequate  
 Amount is somewhat inadequate  
 Amount is seriously inadequate

THE FOLLOWING FIVE QUESTIONS, ALTHOUGH APPEARING LENGTHY, ALL REFERENCE THE SAME LIST OF ACTIVITIES.

12. Please indicate the Importance you would attach to each of the following activities that might be performed by governments, in general, in promoting exports. Do not limit your answers only to those activities that are performed by your provincial government. (Please check in the appropriate spaces.)

	<u>1</u>	<u>2</u>	<u>3</u>
	Very	Fairly	Not
<u>Business Aids</u>	<u>Important</u>	<u>Important</u>	<u>Important</u>
Operating promotional offices overseas	---	---	---
Organizing trade missions to foreign markets	---	---	---
Exhibits or displays in international trade fairs and shows	---	---	---
Advertising in overseas markets	---	---	---
Provide market information on overseas market areas.	---	---	---
Consultation about foreign trade possibilities	---	---	---
Circulate regular enquiries received from abroad	---	---	---
Assistance in performing mechanics of exporting (e.g. documentation)	---	---	---
Develop pamphlets and other printed material to aid businessmen	---	---	---
Maintain permanent file on trade leads	---	---	---
Establish and publish directory of firms in international business	---	---	---
Sponsor international business conferences, seminars, etc., for businessmen	---	---	---
Perform research projects on foreign markets	---	---	---

13. Please indicate which of the following export promotion activities your provincial government presently performs. (Check in the appropriate spaces.)

- Operating promotional offices overseas.  
 Organizing trade missions to foreign markets.  
 Exhibits or displays in international trade fairs and shows.  
 Advertising in overseas markets.  
 Provide market information on overseas market areas.  
 Consultation about foreign trade possibilities.  
 Circulate regular enquiries received from abroad.  
 Assistance in performing mechanics of exporting (e.g. documentation).  
 Develop pamphlets and other printed material to aid businessmen.  
 Maintain permanent file on trade leads.  
 Establish and publish directory of firms in international business.  
 Sponsor international business conferences, seminars, etc., for businessmen.  
 Perform research projects on foreign markets.

14. This question concerns export promotion activities your province may have performed in the past but that have been discontinued. Please indicate the primary reasons for discontinuing the activity. (Please check in the appropriate spaces.)

	If discontinued, primary reason for discontinuance		
	Deemed Insufficiently Useful	Reduction in Available Resources	Other
<u>Business Aids</u>			
Operating promotional offices overseas	---	---	---
Organizing trade missions to foreign markets	---	---	---
Exhibits or displays in international trade fairs and shows	---	---	---
Advertising in overseas markets	---	---	---
Provide market information on overseas market areas	---	---	---
Consultation about foreign trade possibilities	---	---	---
Circulate regular enquiries received from abroad	---	---	---
Assistance in performing mechanics of exporting (e.g. documentation)	---	---	---
Develop pamphlets and other printed material to aid businessmen	---	---	---
Maintain permanent file on trade leads	---	---	---
Establish and publish directory of firms in international business	---	---	---
Sponsor international business conferences, seminars, etc., for businessmen	---	---	---
Perform research projects on foreign markets	---	---	---

15. Please indicate in the first column which three of the following export promotion activities would receive greater attention if additional resources were made available by your provincial government. Please indicate in the second column the three activities that would likely be reduced in scope if there was a reduction in the funds made available. Please indicate order of priority. (For example, place "1" beside the first activity to receive greater attention or the first to be reduced, etc.)

	Three activities to receive greater attention if additional funds made available	Three activities likely to be reduced in scope if there was a reduction in available funds
<u>Business Aids</u>		
Operating promotional offices overseas	---	---
Organizing trade missions to foreign markets	---	---
Exhibits or displays in international trade fairs and shows	---	---
Advertising in overseas markets	---	---
Provide market information on overseas market areas	---	---
Consultation about foreign trade possibilities	---	---
Circulate regular enquiries received from abroad	---	---
Assistance in performing mechanics of exporting (e.g. documentation)	---	---
Develop pamphlets and other printed material to aid businessmen	---	---
Maintain permanent file on trade leads	---	---
Establish and publish directory of firms in international business	---	---
Sponsor international business conferences, seminars, etc., for businessmen	---	---
Perform research projects on foreign markets	---	---



16. Which of the following activities has your provincial government co-operated with the federal government in performing in the last 12 months? (Please check in the appropriate spaces.)

- Operating promotional offices overseas.  
 Organizing trade missions to foreign markets.  
 Exhibits or displays in international trade fairs and shows.  
 Advertising in overseas markets.  
 Provide market information on overseas market areas.  
 Consultation about foreign trade possibilities.  
 Circulate regular enquiries received from abroad.  
 Assistance in performing mechanics of exporting (e.g. documentation).  
 Develop pamphlets and other printed material to aid businessmen.  
 Maintain permanent file on trade leads.  
 Establish and publish directory of firms in international business.  
 Sponsor international business conferences, seminars, etc., for businessmen.  
 Perform research projects on foreign markets.  
 None of the above.

17. How effective do you consider the following federal government programs to be in promoting exports from your province? (Please check in the appropriate spaces.)

	<u>1</u>	<u>2</u>	<u>3</u>	
	Not Sure	Very Effective	Fairly Effective	Not Effective
Trade Missions	---	---	---	---
PEMD "A" Capital Projects Abroad	---	---	---	---
PEMD "B" General Market Development	---	---	---	---
PEMD "C" Trade Fairs	---	---	---	---
PEMD "D" Incoming Foreign Buyers	---	---	---	---
PEMD "E" Export Consortium	---	---	---	---
Assistance	---	---	---	---
Export Development Corporation	---	---	---	---

18. With which of the following federal agencies has your provincial government co-operated - in a meaningful way - on export promotion during the last 12 months? (Please check in the appropriate spaces.)

- Dept. of Industry, Trade, and Commerce.  
 Dept. of External Affairs.  
 Dept. of Agriculture.  
 CIDA.  
 Others (please specify) \_\_\_\_\_  
 None.

19. With which private agencies has your provincial government co-operated - in a meaningful way - on export promotion during the last 12 months? (Please check in the appropriate spaces.)

Board of Trade (Chamber of Commerce).  
 Manufacturer's and Trade Associations.  
 World trade associations.  
 Agricultural groups.  
 Economic development groups  
 Financial institutions.  
 Others (please specify if significant) \_\_\_\_\_  
 None.

20. With how many other provincial governments has your provincial government co-operated - in a meaningful way - on export promotion during the last 12 months? (Please check one.)

One other province.  
 Two other provinces.  
 Three other provinces.  
 More than three other provinces.  
 None.

IF "NONE" IS INDICATED, PLEASE OMIT QUESTION NO. 21 AND PROCEED TO QUESTION NO. 22.

21. If your province has co-operated with other provincial governments on export promotion in the last 12 months, which of the following activities were included? (Please check in the appropriate spaces.)

General information exchange.  
 Interchange of publications.  
 Interchange of trade mission information.  
 Organizing joint trade missions to foreign markets with one or more other provinces.  
 Sharing exhibits or displays in international trade fairs and shows with one or more other provinces.  
 Sharing advertising in overseas markets with one or more other provinces.  
 Providing market information on overseas market areas to one or more other provinces.  
 Formal consultation with officials from other provincial programs about foreign trade possibilities.  
 Cosponsoring with other provinces international business conferences, seminars, etc., for businessmen.  
 Other important forms of assistance

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

... 9

22. Does your department presently co-operate - in a meaningful way - on export promotion with other departments within your provincial government?

\_\_\_ No

\_\_\_ Yes. If yes, with which departments (please specify).

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

23. What is the relative importance of each of the following international business activities to your provincial government, as measured by the percentage of total resources committed?

Percentage of Total  
Resources Committed

___%	International Trade - Exports
___%	International Trade - Imports
___%	Capital Investment - by local firms outside Canada
___%	Capital Investment - by foreign firms inside your province
___%	Other (please specify if significant)
100%	_____

Additional comments with respect to any aspect of this study:

T H A N K   Y O U

APPENDIX B

FRENCH TRANSLATION OF PROVINCIAL INDUSTRY DEPARTMENT  
QUESTIONNAIRE. COPY SENT TO THE DEPUTY MINISTER  
OF THE QUEBEC DEPARTMENT OF INDUSTRY AND COMMERCE

COLLEGE DE COMMERCE

UNIVERSITE DE LA SASKATCHEWAN

Projet sur

LE PROGRAMME DES EXPORTATIONS  
DU GOUVERNEMENT DE LA SASKATCHEWAN

Questionnaire #1

(Ministères de l'industrie provinciaux) -

Veillez renvoyer la formule complétée  
dans l'enveloppe ci-inclue a:

Professor Richard C. Burke  
College of Commerce  
University of Saskatchewan  
Saskatoon, Saskatchewan  
S7N 0W0

Soumis par:

Nom: \_\_\_\_\_

Adresse: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

INTRODUCTION ET OBJECTIFS DE LA RECHERCHE

Le questionnaire ci-inclu traite la première phase d'un projet de recherche important qui vise à élargir la connaissance présente de la coopération gouvernement - affaires dans le domaine de la promotion des exportations. Cet objectif sera accompli par l'examen du rôle joué par le gouvernement provincial de la Saskatchewan dans ce domaine. Les objectifs généraux de cette étude sont comme suit:

- 1) déterminer l'envergure du programme de promotion des exportations de la Saskatchewan
- 2) comparer le programme de la Saskatchewan avec les programmes des autres provinces
- 3) déterminer comment le programme de la Saskatchewan compare avec, et est différent de, ou fait l'addition au programme des exportations fédéral
- 4) essayer de mesurer l'efficacité du programme présent en éprouvant les besoins des exportateurs de la Saskatchewan et des exportateurs éventuels.  
D'intérêt spécial sont les suivants:
  - a) le niveau de conscience du Programme de la promotion des exportations de la Saskatchewan
  - b) le niveau de son utilisation
  - c) les attitudes des exportateurs et des non-exportateurs vers l'efficacité du programme concernant leurs besoins
- 5) demander des suggestions des hommes d'affaires et des officiers gouvernementaux, et tirer des conclusions concernant l'amélioration du programme présent (ou des nouveaux services qu'on pourrait offrir) afin de rendre ce programme plus efficace.

Un but secondaire est de ramasser l'information sur d'autres issues connexes importantes qui puissent se présenter au cours de la recherche.

La première phase de cette étude concerne une comparaison du programme de la Saskatchewan aux programmes des autres provinces, et aussi une évaluation générale des activités de promotion des exportations au niveau provincial dans tout le pays. A propos de cet aspect, on envoie des questionnaires courts aux ministères gouvernementaux concernés (par exemple, les ministères de l'industrie, de l'agriculture) dans chaque province, afin de ramasser les données sur leurs

programmes des exportations respectifs. Le questionnaire ci-inclus porte sur le ministère de l'industrie de chaque province.

La majorité de ces réponses ne peuvent pas être facilement obtenues de sources disponibles. Quelques-unes traitent d'attitudes et exigent une réponse personnelle d'un officier gouvernemental travaillant dans le domaine de promotion des exportations.

## INSTRUCTIONS

Veillez remplir de votre mieux le questionnaire ci-inclu. Si l'information demandée pour une question particulière n'est pas disponible, ou n'applique pas à votre programme provincial, mettez "N/A" à côté de la question. Si vous considérez comme confidentielle l'information donnée dans une question particulière, veuillez indiquer ceci en mettant en "c" à côté de la question. Tels demandes seront gardés à titre essentiellement confidentiel.

Si vous ou votre ministère voudrait avoir une copie de l'étude achevée, veuillez indiquer au-dessous le nom et l'adresse de l'individu qui voudrait la recevoir. La date d'achèvement prévue est septembre, 1977.

Nom: \_\_\_\_\_  
Adresse: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Je vous remercie de votre coopération. Vous pouvez faciliter notre recherche en renvoyant le questionnaire aussitôt que possible dans l'enveloppe ci-inclue.

Bien à vous,

Richard Burke, Ph.D.  
Associate Professor  
of Accounting

APPENDIX B

French translation of provincial industry department  
questionnaire. Copy sent to the Deputy Minister of  
the Quebec Department of Industry and Commerce.

1. En quelle année est-ce que votre gouvernement provincial a officiellement lancé un programme de promotion des exportations?

\_\_\_\_\_ l'année  
\_\_\_\_\_ aucun programme de promotion des exportations n'existe

2. Quel pourcentage de dépenses de promotion des exportations de votre gouvernement provincial est destiné vers des compagnies qui s'occupent déjà des exportations, et vers des compagnies qui ne s'occupent pas encore des exportations?

Pourcentage de dépenses  
de promotion des exportations

\_\_\_\_\_ % destiné vers des compagnies qui s'occupent  
déjà des exportations  
\_\_\_\_\_ % destiné vers des compagnies qui ne s'occupent  
pas encore des exportations  
100%

3. Vers quelle grandeur de compagnie est destiné le programme de promotion des exportations de votre province? Veuillez les arranger par rang d'importance décroissante (par exemple, mettez "1" à côté de la grandeur de la compagnie qui reçoit le plus d'importance, "2" à côté de la grandeur de la compagnie qui reçoit l'importance secondaire, etc.).

	1	-	10 employés	
	11	-	50	"
	51	-	250	"
	251	-	1000	"
			plus de 1000	"

4. Parmi la liste suivante des espèces de compagnies, vers lesquelles est destiné le programme de promotion des exportations de votre province? Choisissez les trois les plus importantes. Veuillez les arranger par rang d'importance décroissante. (Par exemple, mettez "1" à côté de l'espèce de compagnie qui reçoit le plus d'attention, "2" à côté de l'espèce de compagnie qui reçoit l'importance secondaire, etc.)



- fabricants
  - industrie de transformation
  - agriculture (produits de base - pas traités)
  - industrie minière
  - intermédiaires domestiques (par exemple, grossistes, détaillants)
  - compagnies qui fournissent des services
  - intermédiaires des marchés internationaux
  - autre (veuillez spécifier si c'est significatif)
- 

5. Parmi les ressources suivantes qui sont nécessaires pour les compagnies afin d'exporter avec succès, quelles trois considérez-vous avoir besoin de plus de développement parmi les compagnies de votre province? Veuillez les arranger par rang d'importance décroissante (par exemple, mettez "1" à côté de la ressource qui a besoin le plus de développement, etc.).

- ressources fiscales
  - ressources de production
  - l'emploi du temps par l'administration à haute direction
  - connaissance dans le domaine d'administration d'exportation
  - force commerciale
  - recherche et développement
  - autres (veuillez spécifier si ceux-ci sont significatifs)
- 

6. Parmi les méthodes suivantes qui servent à informer les hommes d'affaires de l'assistance gouvernemental disponible pour les exportations, veuillez indiquer l'importance que vous donnez à chaque méthode. (Veuillez cocher les espaces appropriés.)

<u>Méthodes d'informer les hommes d'affaires</u>	<u>1</u> Très Important	<u>2</u> Assez Important	<u>3</u> Pas Important
-Contact personnel direct avec les hommes d'affaires	_____	_____	_____
-Correspondance directe avec des établissements	_____	_____	_____
-Conférences, réunions et séminaires	_____	_____	_____
-Discours aux groupes commerc- iaux et aux groupes de service	_____	_____	_____
-L'ensemble des informations	_____	_____	_____
-Rapports dans les publications des agences (par exemple, publication mensuelle)	_____	_____	_____
-Communiqués de presse	_____	_____	_____
-Présentations à la radio et à la télévision	_____	_____	_____

7. En général, quelle a été la réaction des hommes d'affaires aux efforts de les encourager de se servir du programme d'assistance d'exportation de votre gouvernement provincial? (Veuillez en cocher un.)

\_\_\_\_\_ pas d'intérêt et peu d'usage  
 \_\_\_\_\_ intérêt modéré et usage  
 \_\_\_\_\_ intérêt appréciable et usage  
 \_\_\_\_\_ intérêt profond et usage

8. Combien d'employés à temps complet du gouvernement provincial est-ce qu'il y a qui sont présentement engagés dans la promotion des exportations de votre province?

\_\_\_\_\_

9. Quelle est la quantité de ressources fiscales que votre gouvernement provincial a confié à la promotion des exportations pendant la dernière année fiscale? (Veuillez en cocher un.)

\_\_\_\_\_ moins de \$ 25,000  
 \_\_\_\_\_ \$ 25,000 - \$ 49,999  
 \_\_\_\_\_ \$ 50,000 - \$ 99,999  
 \_\_\_\_\_ \$100,000 - \$249,999  
 \_\_\_\_\_ \$250,000 - \$499,999  
 \_\_\_\_\_ \$500,000 et plus

10. Quel est le pourcentage de dépenses sur la promotion des exportations pendant cette dernière année fiscale qui était assigné au vrai fournissement de services, par contraste avec l'avertissement aux hommes d'affaires des services disponibles? (Veuillez en cocher un.)

Dépenses assignées au vrai  
fournissement de services

\_\_\_\_\_ 0 - 50 pour-cent  
 \_\_\_\_\_ 51 - 75 pour-cent  
 \_\_\_\_\_ 76 - 100 pour-cent

11. A votre avis, quelle est la suffisance des ressources de votre gouvernement provincial dans le programme de promotion des exportations? (Veuillez en cocher un dans chaque section.)

Nombre de personnel

\_\_\_\_\_ nombre suffisant  
 \_\_\_\_\_ nombre un peu insuffisant  
 \_\_\_\_\_ nombres sont gravement insuffisants.

Suffisance de fonds

\_\_\_\_\_ la somme est suffisante  
 \_\_\_\_\_ la somme est un peu insuffisante  
 \_\_\_\_\_ la somme est gravement insuffisante

QUOIQUE LES CINQ QUESTIONS SUIVANTES SEMBLANT TRES LONGUES,  
VOUS REMARQUEREZ QU'ELLES TRAITENT LA MEME LISTE D'ACTIVITES

12. Veuillez indiquer l'importance que vous donneriez à chacune des activités suivantes qui pourrait être exécutée par les gouvernements, en général, dans la promotion des exportations. Ne limitez pas vos réponses seulement à celles qui sont faites par votre gouvernement provincial. (Veuillez cocher dans les espaces appropriés.)

	<u>1</u>	<u>2</u>	<u>3</u>
	Très	Assez	Pas
<u>Assistance aux affaires</u>	<u>Important</u>	<u>Important</u>	<u>Important</u>
-Fonctionnement des bureaux de promotion à l'étranger	_____	_____	_____
-Organisation des missions commerciales pour les marchés étrangers	_____	_____	_____
-Expositions dans les foires commerciales internationales	_____	_____	_____
-Annonces dans les marchés étrangers	_____	_____	_____
-Fournissement d'information sur les marchés étrangers	_____	_____	_____
-Consultation sur les possibilités de commerce étranger	_____	_____	_____
-Faire communiquer les enquêtes régulièrement reçues de l'étranger	_____	_____	_____
-Assistance donnée aux logistiques de l'exportation (par ex. documentation)	_____	_____	_____
-Développement de brochures et d'autres matériaux à l'aide des hommes d'affaires	_____	_____	_____
-Maintenir un dossier permanent des possibilités commerciales	_____	_____	_____
-Etablir et publier un annuaire de compagnies engagées sur une base internationale	_____	_____	_____
-Offrir de l'aide fiscale et de l'aide à l'organisation de conférences d'affaires internationales, de séminaires, etc. pour les hommes d'affaires	_____	_____	_____
-Exécuter des travaux de recherche au sujet des marchés étrangers	_____	_____	_____

13. Veuillez indiquer lesquelles des activités suivantes de promotion des exportations que votre gouvernement provincial exécute présentement. (Veuillez cocher dans les espaces appropriés.)

- \_\_\_\_\_ Fonctionnement des bureaux de promotion à l'étranger.  
 \_\_\_\_\_ Organisation des missions commerciales pour les  
 \_\_\_\_\_ marchés étrangers.  
 \_\_\_\_\_ Expositions dans les foires commerciales inter-  
 \_\_\_\_\_ nationales.  
 \_\_\_\_\_ Annonces dans les marchés étrangers.  
 \_\_\_\_\_ Fournissement d'information sur les marchés étrangers.  
 \_\_\_\_\_ Consultation sur les possibilités de commerce  
 \_\_\_\_\_ étranger.  
 \_\_\_\_\_ Faire communiquer les enquêtes régulièrement reçues  
 \_\_\_\_\_ de l'étranger.  
 \_\_\_\_\_ Assistance donnée aux logistiques de l'exportation  
 \_\_\_\_\_ (par exemple, documentation).  
 \_\_\_\_\_ Développement de brochures et d'autres matériaux  
 \_\_\_\_\_ imprimés à l'aide des hommes d'affaires.  
 \_\_\_\_\_ Maintenir un dossier permanent des possibilités  
 \_\_\_\_\_ commerciales.  
 \_\_\_\_\_ Etablir et publier un annuaire de compagnies engagées  
 \_\_\_\_\_ sur une base internationale.  
 \_\_\_\_\_ Offrir de l'aide fiscale et de l'aide à l'organisa-  
 \_\_\_\_\_ tion de conférences d'affaires internationales,  
 \_\_\_\_\_ de séminaires, etc. pour les hommes d'affaires.  
 \_\_\_\_\_ Exécuter des travaux de recherche au sujet des  
 \_\_\_\_\_ marchés étrangers.

14. Cette question traite les activités de promotion des exportations que votre province a pu exécuter dans le passé mais qui ont été abandonnées. Veuillez indiquer les raisons principales pour avoir abandonné ces activités. (Veuillez cocher dans l'espace approprié.)

	Si abandonnée, la raison principale pour l'abandonnement		
	Jugée insuffisamment utile	Diminution de ressources disponibles	Autre
<u>Assistances aux affaires</u>			
-Fonctionnement des bureaux de promotion à l'étranger	_____	_____	_____
-Organisation des missions commerciales pour les marchés étrangers	_____	_____	_____
-Expositions dans les foires commerciales internationales	_____	_____	_____
-Annonces dans les marchés étrangers	_____	_____	_____
-Fournissement d'information sur les marchés étrangers	_____	_____	_____
-Consultation sur les possibilités de commerce étranger	_____	_____	_____
-Faire communiquer les enquêtes régulièrement reçues de l'étranger	_____	_____	_____
-Assistance donnée aux logisticiens de l'exportation (par exemple, documentation)	_____	_____	_____
-Développement de brochures et d'autres matériaux imprimés à l'aide des hommes d'affaires	_____	_____	_____
-Maintenir un dossier permanent des possibilités commerciales	_____	_____	_____
-Etablir et publier un annuaire de compagnies engagées sur une base internationale	_____	_____	_____
-Offrir de l'aide fiscale et de l'aide à l'organisation de conférences d'affaires internationales, de séminaires, etc. pour les hommes d'affaires	_____	_____	_____
-Exécuter des travaux de recherche au sujet des marchés étrangers.	_____	_____	_____

15. Parmi la liste d'activités suivante, veuillez indiquer dans la première colonne les trois activités de promotion des exportations qui recevraient le plus d'attention si des ressources supplémentaires seraient disponibles de votre gouvernement provincial. Veuillez indiquer dans la deuxième colonne les trois activités qui probablement seraient réduites si les fonds disponibles étaient réduits. Veuillez les indiquer selon l'ordre de priorité. (Par exemple, mettez "1" à côté de l'activité qui recevrait le plus d'attention ou qui serait la première à être réduite, etc.)

<u>Assistances aux affaires</u>	<u>les trois activités qui recevraient le plus d'attention si des ressources supplémentaires étaient disponibles</u>	<u>les trois activités qui probablement seraient réduites si les fonds disponibles étaient réduits</u>
-Fonctionnement des bureaux de promotion à l'étranger	_____	_____
-Organisation des missions commerciales pour les marchés étrangers	_____	_____
-Expositions dans les foires commerciales internationales	_____	_____
-Annonces dans les marchés étrangers	_____	_____
-Fournissement d'information sur les marchés étrangers	_____	_____
-Consultation sur les possibilités de commerce étranger	_____	_____
-Faire communiquer les enquêtes régulièrement reçues de l'étranger	_____	_____
-Assistance donnée aux logistiques de l'exportation (par exemple, documentation)	_____	_____
-Développement de brochures et d'autres matériaux imprimés à l'aide des hommes d'affaires	_____	_____
-Maintenir un dossier permanent des possibilités commerciales	_____	_____
-Etablir et publier un annuaire de compagnies engagées sur une base internationale	_____	_____
-Offrir de l'aide fiscale et de l'aide à l'organisation de conférences d'affaires internationales, de séminaires, etc. pour les hommes d'affaires	_____	_____
-Exécuter des travaux de recherche au sujet des marchés étrangers	_____	_____

16. Parmi la liste d'activités suivante, choisissez l'activité ou les activités dans lesquelles il y avait la co-opération entre votre gouvernement provincial et le gouvernement fédéral pendant les derniers douze mois. (Veuillez cocher dans les espaces appropriés.)

<input type="checkbox"/>	Fonctionnement des bureaux de promotion à l'étranger
<input type="checkbox"/>	Organisation des missions commerciales pour les marchés étrangers
<input type="checkbox"/>	Expositions dans les foires commerciales internationales
<input type="checkbox"/>	Annonces dans les marchés étrangers
<input type="checkbox"/>	Fournissement d'information sur les marchés étrangers
<input type="checkbox"/>	Consultation sur les possibilités de commerce étranger
<input type="checkbox"/>	Faire communiquer les enquêtes régulièrement reçues de l'étranger
<input type="checkbox"/>	Assistance donnée aux logisticiens de l'exportation (par exemple, documentation)
<input type="checkbox"/>	Développement de brochures et d'autres matériaux imprimés à l'aide des hommes d'affaires
<input type="checkbox"/>	Maintenir un dossier permanent des possibilités commerciales
<input type="checkbox"/>	Etablir et publier un annuaire de compagnies engagées sur une base internationale
<input type="checkbox"/>	Offrir de l'aide fiscale et de l'aide à l'organisation de conférences d'affaires internationales, de séminaires, etc. pour les hommes d'affaires
<input type="checkbox"/>	Exécuter des travaux de recherche au sujet des marchés étrangers

17. A votre avis, quelle est l'efficacité des programmes du gouvernement fédéral concernant la promotion des exportations de votre province? (Veuillez cocher dans les espaces appropriés.)

	<u>1</u>	<u>2</u>	<u>3</u>	
	<u>Pas certain</u>	<u>Très efficace</u>	<u>Assez efficace</u>	<u>Pas efficace</u>
-Missions commerciales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-PDME "A" Projets d'investissements à l'étranger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-PDME "B" Développement général des marchés	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-PDME "C" Foires commerciales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-PDME "D" Acheteurs étrangers en visite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-PDME "E" Aide aux consortiums d'exportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-Société pour l'expansion des exportations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



18. Avec lesquelles des agences fédérales suivantes a votre gouvernement provincial co-opéré d'une façon significative à la promotion des exportations pendant les derniers douze mois? (Veuillez cocher dans les espaces appropriés.)

Ministère de l'industrie et du commerce  
 Ministère des affaires extérieurs  
 Ministère de l'agriculture  
 l'ACDI  
 Autre (veuillez spécifier si c'est significatif)  
 Aucun

19. Avec lesquelles des agences privées suivantes a votre gouvernement provincial co-opéré d'une façon significative à la promotion des exportations pendant les derniers douze mois?

Chambre de commerce  
 Associations de commerçants et de fabricants  
 Associations de commerce mondiale  
 Groupes agricoles  
 Groupes de développement économique  
 Institutions financières  
 Autre (veuillez spécifier si c'est significatif)  
 Aucun

20. Avec combien d'autres gouvernements provinciaux a votre gouvernement provincial co-opéré d'une façon significative à la promotion des exportations pendant les derniers douze mois? (Veuillez en cocher un.)

une autre province  
 deux autres provinces  
 trois autres provinces  
 plus de trois autres provinces  
 aucune

SI VOUS AVEZ INDIQUE "AUCUNE", VEUILLEZ OMETTRE LA QUESTION NUMERO 21 ET CONTINUER A LA QUESTION NUMERO 22.

21. Si votre province a co-opéré avec d'autres gouvernements provinciaux à la promotion des exportations pendant les derniers douze mois, lesquelles des activités suivantes ont été incluses? (Veuillez cocher dans les espaces appropriés.)

- Echange d'information générale  
 Echange de publications  
 Echange d'information sur les missions commerciales  
 Organisation de missions commerciales en commun aux marchés étrangers avec une ou plus d'une autre province  
 Participation avec une ou plus d'une autre province dans les foires et les expositions internationales  
 Participation avec une ou plus d'une autre province dans la publicité dans les marchés étrangers  
 Fournissement d'information sur les marchés étrangers à une ou plus d'une autre province  
 Consultation formelle avec des fonctionnaires d'autres programmes provinciaux au sujet des possibilités pour le commerce étranger  
 Coopération avec d'autres provinces à l'offert de l'aide fiscale et de l'aide d'organisation de séminaires et de conférences internationales, etc. pour les hommes d'affaires  
 Autres sortes d'assistance significatives
- 
- 
-

22. Actuellement, est-ce que votre ministère co-opère d'une façon significative à la promotion des exportations avec d'autres ministères de votre gouvernement provincial?

\_\_\_\_\_ Non

\_\_\_\_\_ Oui Si "oui", avec quels ministères (veuillez spécifier lesquels)

---



---



---



---

23. Quelle est l'importance relative à votre gouvernement provincial de chacune des activités d'affaires internationaux suivantes, comme déterminé par le pourcentage de ressources confiées?

Pourcentage de totales  
ressources confiées

_____ %	Commerce internationale - exportation
_____ %	Commerce internationale - importation
_____ %	Fonds de placement - hors du Canada par des compagnies locales
_____ %	Fonds de placement dans votre province par des compagnies étrangères
_____ %	Autre (veuillez spécifier si c'est significatif)

100%

D'autres commentaires concernant n'importe quel aspect de  
cette étude:

M E R C I

## BIBLIOGRAPHY

### Books and Articles

Abdel-Malek, Talaat, Managerial Export Orientation, School of Business Administration, University of Western Ontario, London, Ontario, 1974

Albaum, Gerald, State Governmental Promotion of International Business, Division of Economic and Business Research, College of Business and Public Administration, University of Arizona, Tucson, Arizona, March, 1968, pp. 11 - 16

Albaum, Gerald and Michael Peters, "How Arizona's State Government Promotes International Business", Arizona Review, June - July, 1969

Van der ster, Wim, "International Business Promotion in Oregon", Oregon Business Review, Vol. XXX, No. 9, September, 1971, pp. 1 - 7

### Government Documents

Government of Canada:

An Introduction to Canada's Export Development Corporation, Export Development Corporation

Export Development Corporation, Annual Report (1975)

Financing Assistance for the Exporter of Canadian Capital Equipment and Financial Services, Export Development Corporation

The Canadian Businessman's Dollars and Sense Guide to Exporting, Export Development Corporation

Canadian Export Trade Development, Agriculture and Food, Agriculture, Fisheries and Food Products Branch, Department of Industry, Trade and Commerce

International Trade Shows and Promotions, 1977 - 78, Department of Industry, Trade and Commerce, 1976

Program for Export Market Development, Section "A", Incentive for Participation in Capital Projects Abroad, Department of Industry, Trade and Commerce, Ottawa, August 1, 1974

Program for Export Market Development, Section "B",  
General Market Development, Department of Industry,  
Trade and Commerce, Ottawa, August 1, 1974

Program for Export Market Development, Section "C",  
Incentive for Participation in Trade Fairs Outside  
Canada, Department of Industry, Trade and Commerce,  
Ottawa, August 1, 1974

Program for Export Market Development, Section "D",  
Incoming Foreign Buyers, Department of Industry,  
Trade and Commerce, Ottawa, August 1, 1974

Program for Export Market Development, Section "E",  
Export Consortium Assistance, Department of Industry,  
Trade and Commerce, Ottawa, August 1, 1974

Program for Export Market Development, Synopsis, Department  
of Industry, Trade and Commerce, Ottawa, August 1,  
1974

Trade News, Food and Agriculture, Agriculture, Fisheries,  
and Food Products Branch, Department of Industry,  
Trade and Commerce

Provincial Governments (By Province - West to East):

B.C. Market News, British Columbia Department of Economic  
Development

British Columbia Trade Mission Program, British Columbia  
Department of Economic Development

Business Development Programs, British Columbia Department  
of Economic Development

Department of Economic Development, Annual Report (1974),  
British Columbia Government

Export Assistance Programs, British Columbia Department  
of Economic Development

First Steps for the Potential Exporter, British Columbia  
Department of Economic Development

Incoming Buyers Program, British Columbia Department of  
Economic Development

Key Contacts for the Exporter, British Columbia Department  
of Economic Development

Market Development Assistance Program, British Columbia  
Department of Economic Development

Monthly Bulletin of Business Activity, British Columbia  
Department of Economic Development

Trade and Industry Bulletin, British Columbia Department  
of Economic Development

Trade Show Assistance Program, British Columbia Department  
of Economic Development

Aid to Trade Program, Saskatchewan Department of Industry  
and Commerce

Business Forum, Saskatchewan Department of Industry and  
Commerce

Dittman, Peter and Tom Rogers, The North American Market  
for Saskatchewan Farm Machinery, Trade Development  
Branch, Saskatchewan Department of Industry and  
Commerce

Prairie Implement Buyer's Guide, Saskatchewan Department  
of Industry and Commerce

Saskatchewan Business Guide, Saskatchewan Department of  
Industry and Commerce

Saskatchewan Economic Review, Saskatchewan Bureau of  
Statistics, 1975, 1976

Saskatchewan Industry Today, Saskatchewan Department of  
Industry and Commerce

Saskatchewan Is..., Saskatchewan Departments of Agriculture  
and Industry and Commerce

Saskatchewan Manufacturer's Guide, Saskatchewan Department  
of Industry and Commerce

"Special Report - Saskatchewan", Trade and Commerce, Vol.  
71, No. 8, August, 1976

Support Programs for Business and Industry in Saskatchewan,  
Saskatchewan Department of Industry and Commerce

Trade Talk, Saskatchewan Department of Industry and  
Commerce

Committee on Manitoba's Economic Future, Manitoba, 1962 -  
1975, Report to the Government of Manitoba, Winnipeg,  
1963

Export Assistance Available to Manitoba Manufacturers and Professional Services, Manitoba Trading Corporation

Helping Manitoba Business to Develop Exports, Manitoba Trading Corporation

Manitoba Business Review, Manitoba Department of Industry and Commerce

Supplying Products and Services from Manitoba, Canada, Manitoba Trading Corporation

A Guide to Government Assistance Programs for Industry, Domestic Trade Analysis Section, Trade Research Branch, Division of Trade, Ontario Ministry of Industry and Tourism, August, 1975

Ontario Trade and Export Journal, Communications Division, Ontario Ministry of Industry and Tourism

The Ontario Industry, Trade and Tourism Review, 1975 - 1976, Communications Division, Ontario Ministry of Industry and Tourism, May, 1976

Trade Services, Division of Trade, Ontario Ministry of Industry and Tourism

Accords Industriels, Division des accords industriels, Ministère d'Industrie et du Commerce, Gouvernement du Québec, 1976

Economic Bulletin of the Quebec Department of Industry and Commerce, Quebec Department of Industry and Commerce

Export Assistance, Export Assistance Division, Quebec Industrial Development Corporation, 1976

Industrial Agreements, Industrial Agreements Section, Quebec Department of Industry and Commerce, 1976

Liste des Expositions à l'Étranger, 1977 - 78, Services Internationaux, Ministère de l'Industrie et du Commerce, Gouvernement du Québec

Our Business is Getting You Business, Communications Division, Quebec Department of Industry and Commerce, 1973

Programme - Missions de Vente, 1977 - 78, Services Internationaux, Ministère de l'Industrie et du Commerce



Marketing Assistance and Export Promotion for New Brunswick  
Manufacturers, Marketing Services Division, New  
Brunswick Department of Economic Growth, 1975 - 76

Marketing Assistance Program, Marketing and Trade  
Development Division, Nova Scotia Department of  
Development

Market Development Centre, Annual Report, Prince Edward  
Island Department of Industry and Commerce, 1975