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TRADE ROUTES:

Report on the Pilot Phase

(2001–2005)

Canada

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FOREWORD

Since Trade Routes was first announced, the program has been helping to open doors for Canadian arts and cultural exports. Through its brief history, Trade Routes has made significant contributions to the Government of Canada's efforts to increase the long-term sustainability of small- and medium-sized businesses in the arts and cultural sector.

The announcement, in Budget 2005, that Trade Routes would be renewed for another five years (to 2010) marked the end of the program's pilot period. Although this report is intended to highlight Trade Routes' achievements over the 2001–2005 period, its main objective is to share information about the program and its core business lines.

In its first four years in operation, Trade Routes expanded in terms of personnel, skills and resources to service the needs of its many clients, partners and industry stakeholders. The highlights of the report outline that:

- Four core program areas—Market Entry Support, In-Market Assistance, Contributions and Research—have been implemented and are now fully operational;
- Key partnerships are now forged and the program's client base continues to increase yearly;
- A unique brand of learning and trade events were initiated that were well-received by colleagues and industry alike; and,
- Plans are in place to ensure the on-going development of the program, and the necessary resources have been secured to execute them.

Access to foreign markets is essential to ensuring sustainable growth and development for the sector. Trade Routes is well-positioned to provide Canada's arts and cultural entrepreneurs with the necessary tools and services they need in order to take full advantage of international business opportunities.

Through a consistent, partnered approach, Trade Routes will continue to help Canada's arts and cultural entrepreneurs to compete and succeed in international markets.

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ABBREVIATIONS

AIBD	Aboriginal International Business Development
AFM	American Film Market
CTAB	Cultural Trade Advisory Board
CTIP	Culture Trade and Investment Project
CTC	Cultural Trade Commissioner
CTDO	Cultural Trade Development Officer
DFAIT	(the former) Department of Foreign Affairs and International Trade
ECMA	East Coast Music Association
FAC	Foreign Affairs Canada
FY	Fiscal year
IC	Industry Canada
ICFF	International Contemporary Furniture Fair
IIAC	International Initiative Advisory Committee
ITAP	International Trade Action Plan
ITC	International Trade Centre
ITCAN	International Trade Canada
OMDC	Ontario Media Development Corporation
PCH	Department of Canadian Heritage
RTN	Regional Trade Network

SIDIM	Salon international du design d'intérieur de Montréal
SMEs	Small- and medium-sized enterprises
SOFA	Sculpture Objects and Functional Art
TCI	Team Canada Inc
TIDD	Trade and Investment Development Directorate
TTC-CGS	Trade Team Canada–Cultural Goods and Services
VATS	Virtual Aboriginal Trade Show

INTRODUCTION

Canada's Arts and Cultural Sector

The innovative products and services provided by Canada's arts and cultural sector play a vital role in our society. They not only help to express our diversity, values, and identity as Canadians, but also are a vibrant element of Canada's new economy and an essential chapter in our nation's export story.

Economic Impact

Canada's arts and cultural sector is a key contributor to our economy—and its export revenue is growing. In 2002, the sector's contribution to Canada's gross domestic product was nearly \$40 billion, representing almost four per cent of the nation's overall total. From 1996 to 2002, the value of Canadian cultural goods and services exported worldwide grew from \$2.7 billion to \$5.1 billion.¹

Diverse Composition

Canada's dynamic arts and cultural sector is composed of many sub-sectors, including film and video, broadcasting and television, music and sound recording, new media, performing arts, crafts, design, visual arts, publishing, and heritage.

The reality of business can differ significantly among these sub-sectors. For example, developing a film or video may require the contributions of several parties, while creating a work of visual art may be the effort of a single artist. Similarly, some sub-sectors use national distribution chains to export their products or services, while others rely on sales made to established clients or by individual entrepreneurs at trade events. Only a few sub-sectors have solidified their presence nationally; most continue to operate in niche markets and through provincial associations.

Similar Needs

While the composition of Canada's arts and cultural sector is quite diverse, its needs as a whole are quite similar.

With a population of just under 32 million people, the Canadian market is too small to sustain the full potential of its arts and cultural industries. Another challenge is the fact that Canada has one of the most open markets in the G8, and is already a high consumer of imported cultural products. Since competing for a share of the small domestic market will only become more difficult, Canada's cultural enterprises must look increasingly to world markets in order to remain viable and competitive.

As a sector, Canada's arts and cultural entrepreneurs are uniquely positioned to succeed through exporting. Already well recognized internationally, Canada has a strong foundation of creators and entrepreneurs whose work reflects our multi-cultural heritage and diversity. As a partner in one of the most successful trade relationships

¹Sources: Statistics Canada: Culture goods trade 2004; data tables, October 2005, catalogue No. 87-007-XIE, from <http://www.statcan.ca/Daily/English/051017/d051017c.htm>. Culture Services trade 2002; data tables, September 2004; catalogue No. 87-213-XWE, from <http://www.statcan.ca/Daily/English/040909/d040909b.htm>. The Culture Trade and Investment Project is funded by Statistics Canada and Trade Routes.

with one of the world's largest markets (the United States), the upward potential of Canadian cultural exports is enormous.

Despite this potential, however, the Canadian arts and cultural sector remains composed primarily of small- and medium-sized enterprises (SMEs), the majority of which are still emerging exporters. In order to access international markets, these SMEs require human, financial, and information resources that are not traditionally available to smaller businesses. A concerted, coordinated approach to cultural business development is required to enable Canada's arts and cultural entrepreneurs to move quickly into international markets.

A Trade Program for Culture

The Trade and Investment Development Directorate (TIDD), established within the Department of Canadian Heritage (PCH) in 1998, was mandated to support the enhancement of Canada's cultural trade through targeted international business development. A key function of the Directorate was to ensure that federal export and investment attraction programs and services available at that time, were accessible and relevant to all cultural exporters.

In 1999, TIDD set out to develop a trade program specifically tailored to meet the export needs of Canada's arts and cultural sector—namely, Trade Routes.

Consultations With Key Partners

Team Canada Inc

Established in 1997, Team Canada Inc (TCI) is a virtual network of federal departments and agencies, as well as other partners. Its purpose is to integrate the delivery of the Government of Canada's export capability and preparedness and international market programs by providing Canadian businesses with a single window of access to these services. TIDD is PCH's representative to TCI.

The wide range of export services delivered by the members of the TCI network are organized on a continuum that closely mirrors the trade programs and services offered by the Government of Canada to businesses at various stages of export development. The Export Services Continuum begins with services delivered to a potential exporter, and ends with services delivered to an experienced exporter.

The Export Services Continuum

General Information	Skills Development	Export Counselling	Market Entry Support	Export Financing	In-Market Assistance
<p>Export Information Service 1 888 811-1119</p> <p>On-line Export Information Exportsource.ca</p>	<p>Export Preparation Guides</p> <p>Export Skills Training</p> <p>Preparation for U.S.</p> <p>Preparation for Other Markets</p>	<p>Export Readiness Assessment</p> <p>Export Plan Development</p> <p>Export Plan Implementation</p>	<p>Market/Sector Information and Intelligence</p> <p>Missions, Fairs and Trade Related Events</p> <p>Market/Sector Specific Advice and Guidance</p> <p>Market Development Funding</p>	<p>Needs and Assessment and Counselling</p> <p>Provision of Working Capital</p> <p>Foreign Risk Mitigation</p> <p>Medium/Long Term Foreign Buyer Financing</p>	<p>Market Prospect</p> <p>Key Contacts Search</p> <p>Visit Information</p> <p>Face-to-Face Briefing</p> <p>Local Company Information</p> <p>Trouble-shooting</p>

In developing its own cultural trade development initiative, TIDD worked through TCI to consult with other government departments that deliver export programs and services to SMEs. This helped TIDD design an initiative that was not only complementary to existing government services, but also tailored to the specific needs of Canadian cultural entrepreneurs. In addition, some of the initiative's programs and services would be delivered through the Government of Canada's existing export service and program delivery infrastructure.

Cultural Trade Advisory Board

TIDD also solicited input on the development of the Trade Routes initiative from the arts and cultural sector and its various representative organizations.

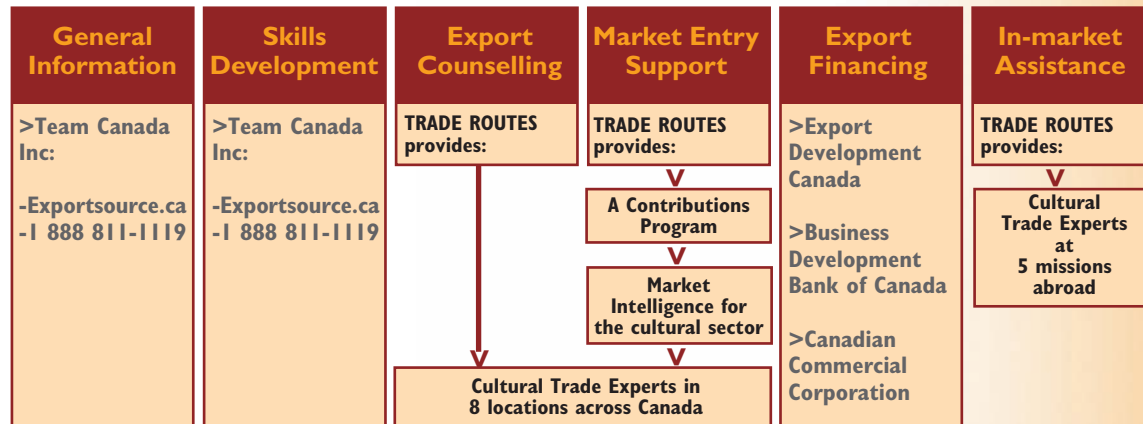
In 1999, following consultations with 70 cultural exporters in Canada, the first consultative group on cultural trade development was established: the Cultural Trade Advisory Board (CTAB). The objective of the CTAB was to help the Government target its trade development support more effectively, and to assist cultural companies in their efforts to access international business opportunities by developing consensus on strategic priorities for sectors and markets.

Composed of members from both the public and private sector, the CTAB worked in concert with TIDD on the development of its cultural trade program. The Board became the key mechanism for coordination and national trade development planning for the arts and cultural sector.

Trade Routes Is Launched

On November 28, 2001, the Minister of Canadian Heritage and the Minister of International Trade launched Trade Routes: Canada's first multi-sectoral and market-driven strategy designed specifically to help the arts and cultural sector take advantage of rapidly expanding international business opportunities.

Trade Routes–Cultural Export Services Continuum



Building on the efforts of the TCI network, Trade Routes would provide training, market information, and counselling to Canadian cultural enterprises, with a focus on export preparedness and international market development.

Program Overview: Trade Routes

Trade Routes provides Canada's arts and cultural entrepreneurs with access to the full range of Government of Canada trade programs and services. It helps private and non-profit sector entrepreneurs to strategically increase their export capacity and sell in international markets.

Goals

Trade Routes focuses its support on initiatives that help to achieve:

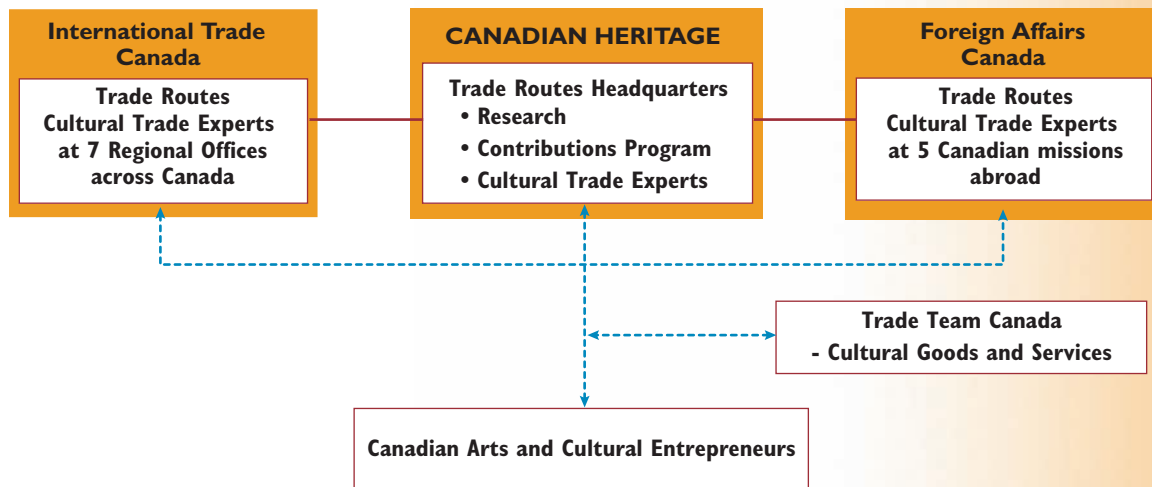
- increased Canadian exports of cultural products and services;
- an expanded cultural export product base;
- more Canadian cultural exporters;
- stronger international positioning for Canada's English and French language cultural products and services;
- improved Canadian share of global cultural trade;
- cultural exports to the United States at levels that capture the full market potential;
- diversification of markets beyond the United States; and
- a stronger "brand" for Canada through our arts and cultural exporters.

Program Areas

Trade Routes is delivered via the following four program areas:

1. The **Market Entry Support** program area consists of cultural trade experts who provide direct support to arts and cultural clients from both program headquarters (TIDD's offices in Gatineau, Quebec) and seven of International Trade Canada's (ITCan's) regional offices across Canada. These officers provide services to clients with a focus on export preparedness and international market development. Officers in the regional offices also help with skills development and export counselling.
2. The **In-Market Assistance** program area consists of cultural trade experts who offer assistance to arts and cultural exporters from key missions abroad. These officers conduct outreach programs and connect with potential partners for Canada's arts and cultural sectors. They implement strategies and programs to promote Canadian cultural goods and services, and work with Canadians interested in exporting to specific markets and local partners seeking Canadian contacts.
3. The two million dollar **Contributions** program area supports initiatives from organizations in the arts and cultural sector that are linked to the development and implementation of long-term strategies. Canadian cultural exporters submit applications to the Trade Routes Contributions Program that meet one or both program components of export preparedness or international market development.
4. The **Research** program area supports targeted studies of specific markets and countries, surveys and profiles of export patterns for Canadian cultural sectors, and the development of data on Canadian cultural exporters and cultural trade.

Program Governance and Delivery



International Trade Canada

Most of the Market Entry program area is delivered from ITCan's network of regional offices in Vancouver (BC), Winnipeg (MB), Toronto (ON), Montreal (QC), Halifax (NS), Moncton (NB), and St. John's (NL). These offices were operated by Industry Canada (IC) and called International Trade Centres (ITCs) until the 2003 federal government reorganization.

The seven Trade Routes cultural trade experts who deliver this program area are referred to as cultural trade commissioners (CTCs), and are co-located to the regional offices under a Memorandum of Understanding between PCH and ITCan. Trade Routes funds the salaries and operational activities of the CTCs, and TIDD provides ongoing direction for their work. The senior trade commissioners at the regional offices provide direct supervision to the CTCs.

Foreign Affairs Canada

The In-Market Assistance program area is delivered by five Trade Routes cultural trade experts, who are referred to as cultural trade development officers (CTDOs). They are seconded to key Canadian missions abroad (Singapore², Los Angeles, New York, Paris, and London) under a Memorandum of Understanding between PCH and Foreign Affairs Canada (FAC).

Trade Routes provides the funding for the salaries and operational requirements of the CTDOs, while TIDD provides ongoing direction for their work. The heads of the commercial sections at the missions (who are ITCan officers) provide direct supervision to the CTDOs.

Canadian Heritage

TIDD has overall responsibility for Trade Routes, and its offices within PCH in Gatineau, Quebec, serve as the program's headquarters.

Staff at headquarters are responsible for the overall management of the program and its finances, the securing of program renewal to 2010, and the expansion/stabilization of the program. Their work includes ensuring open communication with Trade Routes staff at ITCan's regional offices and at missions abroad.

² The office of the CTDO in Singapore was closed on March 31, 2005. Please see the "Asia Pacific Strategy" section of this document on p. 21 for more information.

TIDD staff also deliver, in part, the Research, Contributions, and Market Entry Support program areas. With regard to these program areas, TIDD staff:

- manage the Research program area (which is delivered, in part, by the CTCs and CTDOs who commission reports on their regions/markets) and work with Statistics Canada on the refinement of international trade statistics on cultural goods and services;
- are responsible for managing the Contributions Program (e.g. program design, managing and completing assessments, finance, communication material); and
- act as sectoral cultural trade experts and, via the Market Entry Support program area, provide services to clients with a focus on export preparedness and international market development. They are also responsible for horizontal trade development issues (i.e., Aboriginal, women, education, Francophone).

Trade Team Canada–Cultural Goods and Services

Trade Team Canada sectors bring government and industry together to coordinate national trade development planning and activities in key industries. Cultural goods and services were recognized as a priority industry when the CTAB received (after a performance review was conducted on its activities) official status in August 2002 as Trade Team Canada–Cultural Goods and Services (TTC-CGS). TIDD serves as the secretariat to the TTC-CGS.

TTC-CGS is the only cultural consultative group on trade development. Through its partnership with Trade Routes, TTC-CGS develops international trade action plans (ITAPs) for each cultural sub-sector. The ITAPs identify each sub-sector's market and international business development priorities; the priorities set in these action plans affect the direction of the Trade Routes program areas.

PROGRAM AREAS

The following sections describe Trade Routes' four program areas, and detail some of the achievements made during the pilot period.

Market Entry Support

Market Entry Support is the in-Canada support element of Trade Routes. It is delivered through the CTCs who work in ITCan's regional offices (see "Program Governance and Delivery", p. 12) and by officers at the Trade Routes headquarters. These officers have direct contact with Canada's arts and cultural organizations, serve as the link between Canadian companies and Canadian embassies and consulates abroad, and represent the sector to the program's TCI partners.

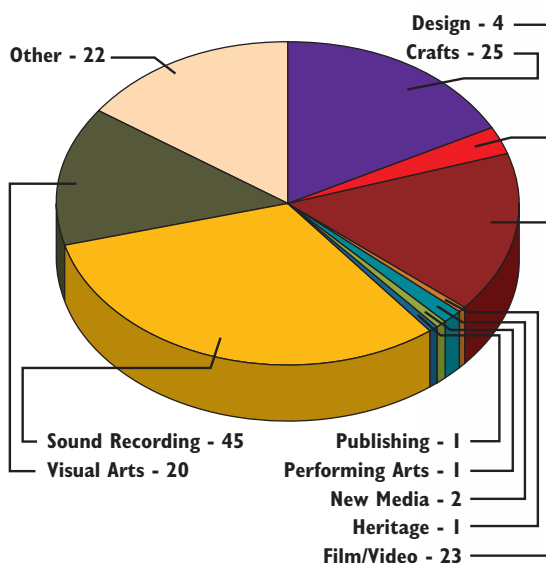
Cultural Trade Commissioners

The CTCs target their services to clients engaged in export preparation—that is, export-readiness assessment, export plan development, and skills development. They work together to offer a one-stop trade service to Canadian SMEs that are ready to export or want to build on their existing international business. They provide access to trade-related programs, services, and contacts; adapt current export tools for use by the cultural sector; and take part in regional trade networks (RTNs), which are government and private-sector partnerships dedicated to stimulating export activity.

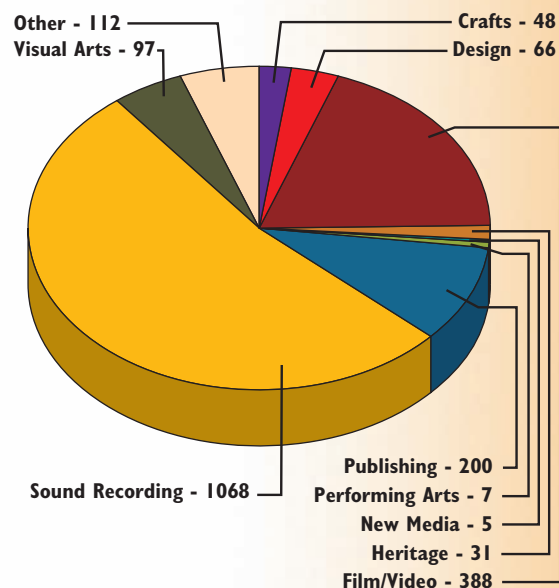
These officers meet with an average of over 650 Canadian companies a year.

Trade Missions and Trade Mission Clients Served by all CTCs (2002–2005)

TRADE MISSIONS



CLIENTS SERVED



Trade Officers at Headquarters

Trade officers at headquarters are assigned horizontal/sectoral trade files, and work to develop market-entry support tools and initiatives with a view to addressing the unique needs of the various sub-sectors within the arts and cultural sector. As part of these responsibilities, these officers participate in inter- and intra-departmental committees, such as the Women in International Business Development Interdepartmental Committee, the Performing Arts Interdepartmental Strategy Committee, and the Interdepartmental Working Group for Publishing.

Further, as part of their sectoral responsibilities, the trade officers coordinate the TTC-CGS sectoral working groups and assist in the development of sectoral trade strategies known as international trade action plans (see “Trade Team Canada – Cultural Goods and Services”, p. 14). They also apply their work on sectoral trade files to the assessment of applications to the Contributions Program (see “Contributions Program”, p. 22).

Examples of Initiatives

The CTCs and trade officers at headquarters also have access to Trade Routes funding to support specific initiatives that enhance cultural trade development objectives. The following are examples of initiatives that were organized during the pilot period:

- In July 2003, the CTC in Winnipeg, working with the CTDO in Los Angeles, coordinated several cultural trade events in support of a **Manitoba training and trade mission to LA**. The mission, which included 120 members of Manitoba’s business, government, and political elite, was aimed at building networks and partnerships with representatives from LA’s entertainment, sound recording, food/beverage, and business industries.

The CTC in Winnipeg provided export preparedness counselling, worked on several coordinating and business match-making committees, and administered networking contracts to assist the numerous marketing efforts that took place during the mission. The event included a showcase of Manitoban artists for LA’s sound recording industry, and culminated in Manitoba hosting the Canada Day celebrations for over 400 guests at the Consul General’s residence. In addition to increasing co-production partnerships, collaborations, and the number of Hollywood productions filmed in Manitoba, the mission resulted in the opening of an LA office for a leading Canadian film, animation and visual effects production company.

- Trade Routes partnered with IC and DFAIT to organize the **Team Canada Digital Trade Mission for women entrepreneurs**. The event, which took place from February 3 to 7, 2003, saw seven businesswomen from industries such as e-learning, edutainment, digital broadcasting, and software design attend a series of meetings, trade shows, and business seminars in France and Germany. Participant Robin Gardiner Poncia, Director of Etraffic Solutions, said the event provided participants with “incredible opportunities to introduce themselves to an important market, generate new sales, and initiate business relationships with Europeans partners.”

- Working with the East Coast Music Association (ECMA), the CTC in Halifax pooled the resources of PCH, DFAIT, and the Atlantic Canada Opportunities Agency to bring 45 buyers and trade commissioners from eight countries to the **2003 East Coast Music Awards**. In addition to 400 one-on-one meetings between artists and international representatives, eight round tables were held to help the artists learn more about building international careers. “Trade Routes’ support helped us bring our international program to a whole new level,” said Steve Horne, Executive Director of the ECMA. “There was more business than any other weekend ever.”
- The same year, the CTC in St. John’s worked to bring international buyers and 15 presenters from the US, Europe, and Australia to the 2003 edition of **Contact East**, Atlantic’s Canada’s performing arts showcase and conference. The event was very successful, with many of the showcased acts receiving bookings on the spot. In particular, three Newfoundland acts booked nearly 200 national and international appearances between them. Many of the international presenters expressed an interest in developing stronger relationships with Atlantic artists, and plan to return for Contact East 2005.
- With Trade Routes support, British Columbia-based artists and educators Lou Lynn and Helen Sibelius brought the **Exporting to the US workshop** to Whitehorse. With the active support of the Yukon Government, 82 people from the territory’s arts and cultural sector attended presentations on a range of subjects: the importance of a professional portfolio; how to set marketing goals and objectives; pricing; exporting; and how to approach galleries and other markets. Minneapolis gallery-owner Jan Siverson and government representatives (including the Vancouver-based CTC) also spoke with participants about how to market themselves and their work in large American centres. Reaction was very positive, with 74 per cent of participants saying they would now start to pursue American and other markets.

Trade Routes teamed up with Ms. Lynn and Ms. Sibelius again in March 2005 for the **Beyond Borders East Craft Conference**. With support from both the program and the New Brunswick College of Craft and Design, 161 participants from Atlantic Canada’s cultural sector attended a series of workshops on the importance of developing a profile, the difference between wholesale and retail craft shows, how to find and access funding, and the keys to creating successful booth displays. They also heard from keynote speaker Mark Lyman, Director of Expressions of Culture, Inc. [which manages the biannual Sculpture Objects and Functional Art (SOFA) international expositions in Chicago and New York] on shaping the public perception of craft. Funding agency representatives (including the CTC from Moncton) discussed the various government programs that offer financial assistance to the craft community.

- In 2004–05, the CTC in Montreal partnered with the city’s World Trade Centre and the International Market Analysis Research Group to organize the **Export your talents to Las Vegas—A market for cultural productions from Quebec training session** for performing arts entrepreneurs. The session gave 40 participants from Quebec companies the opportunity to acquire specific information and intelligence about the Las Vegas market, as well as information on border requirements. “The selection of speakers was very relevant,” said one participant. “Each of them, although from different fields, managed to provide us with valuable information.”

- Over the past three years, the CTC in Ontario has built a successful partnership with the Ontario Media Development Corporation (OMDC), the agency responsible for delivering services to cultural industries in Ontario. Through this partnership, Trade Routes has collaborated with the OMDC on trade events for film, television, and new media.

Trade Routes and the OMDC joined forces with the Canadian Independent Record Production Association in 2004–05 to open the **OMDC International Marketplace**. Held in conjunction with Canada Music Week (CMW), the Marketplace provided 88 foreign delegates with information on Canada’s music industry, networking opportunities, and—more importantly—an environment in which to conduct business. Rated a success by all partners, the Marketplace hopes to be open for business again at CMW 2006.

Additions to the Trade Routes CTC Team

In April 2002, five CTCs were co-located to the ITCs in Vancouver, Winnipeg, Toronto, Montreal, and Halifax; in August of the same year, an additional officer was sent to the ITC in St. John’s. The original distribution of regional responsibilities was as follows:

<i>Location</i>	<i>Regional Responsibilities</i>
St. John’s	Newfoundland and Labrador
Halifax	Nova Scotia, New Brunswick, and Prince Edward Island
Montreal	Quebec
Toronto	Ontario
Winnipeg	Manitoba, Saskatchewan, Nunavut, and the Northwest Territories
Vancouver	British Columbia, Alberta, and the Yukon

The high demand from Francophone communities in the Maritimes led to the creation of a CTC position in Moncton in November 2003. The CTC in Halifax is now responsible for English-speaking communities in Nova Scotia, and the CTC in Moncton for all of New Brunswick, Prince Edward Island, and French-speaking communities in Nova Scotia.

In-Market Assistance

In-Market Assistance is the out-of-Canada element of Trade Routes' direct support, and is delivered by five CTDOs at Canadian embassies, high commissions, and consulates in key missions abroad. The CTDOs develop and implement strategies and programs to promote Canadian cultural goods and services, with a primary focus on particular regions, as detailed below:

- CTDO in Los Angeles—southwestern United States
- CTDO in New York—Tri-State area and East Coast states
- CTDO in Paris—western European countries where French is commonly spoken
- CTDO in London—United Kingdom
- CTDO in Singapore—Asia Pacific (see “Asia Pacific Strategy,” p. 21)

Six Core Services of the Canadian Trade Commissioner Service

All of the trade officers working in Canadian embassies, high commissions, and consulates in 150 cities around the world offer the following six core services to Canadian companies that have researched and selected their target markets:

- **Market Prospect:** providing strategic advice to Canadian companies on doing business in a particular market, including branding, notification of upcoming events (trade fairs, conferences, seminars, trade missions), insight into emerging trends, investment, regulations, and policy issues;
- **Key Contact Search:** identifying qualified foreign contacts who have the local knowledge Canadian companies need to refine and implement their international marketing strategies;
- **Information on Local Organizations:** providing information on organizations or companies that Canadian businesses have identified in their target market;
- **Visit Information:** providing practical advice on the preparation and timing of business trips, including local customs, business practices, and etiquette;
- **Face-to-Face Briefings:** meeting with Canadian companies to learn more about their organization's objectives, reviewing the latest market and policy trends, providing guidance, and discussing future needs; and
- **Troubleshooting:** helping to explore solutions to important strategic or urgent market access issues and, where agreed and appropriate, helping advocate Canadian positions.

Using these services as a base, the CTDOs develop and implement strategies and programs to promote Canadian cultural goods and services. They conduct market research, create networking opportunities, and coordinate both incoming and outgoing missions to put foreign market buyers in contact with Canadian content providers. They have access to Trade Routes' budgets to fund specific initiatives that enhance cultural international business development objectives.

These officers make over 2,500 contacts a year, including potential foreign partners and consumers, and Canadian companies that are already exporting or are ready to enter their target markets.

Examples of CTDO Services

Some examples of the work conducted by the CTDOs during the pilot period include:

- In 2003–04, the CTDO in New York led a three-day mission to the **International Contemporary Furniture Fair (ICFF)** for Canadian companies interested in expanding into the United States. Activities included tours of the major design showrooms of New York, meetings with the owners and buyers of design retailers in Soho and Tribeca, a briefing and tour of the ICFF with the show manager, and networking opportunities at several evening receptions. Trade Routes also partnered with other federal government departments, the Government of Ontario, *Azure Magazine*, and the Totem Design Group in Soho to host the **Pure Canadian** showcase (held during the Fair), which featured the work of 25 Canadian designers of furniture and home accessories. Following the showcase, the well-established design industry magazine *Wallpaper* selected one of the featured Canadians to its list of the top-15 young designers to watch.
- In 2003–04, the CTDO in Paris arranged for the General Commissioner of **ARTÉNÎM** (one of the largest trade shows for contemporary art in the Mediterranean) to visit the Spring Trade Show of the Association des galeries d'art contemporain in Montreal. Following the visit, 10 Canadian galleries were invited to participate in the 2003 edition of ARTÉNÎM (a first since the trade show began in 2000); Canadians also took part in ARTÉNÎM 2004 and were invited to return to the 2005 edition.
- In 2003–04, to raise Canada's design profile in the UK, the CTDO in London invited contacts at the influential **Blueprint magazine** to make their first visit to the Salon international du design d'intérieur de Montréal (SIDIM), the city's largest design event. After returning, *Blueprint* published a story on the Salon, and asked the CTDO about other Canadian design events it could feature. The magazine returned to Canada to attend the 2005 Interior Design Show in Toronto, and again followed up with a full-page article on Canadian designers whose products show "real potential."
- The CTDO in Singapore and the Consulate General of Canada in Sydney partnered with the Bell New Media Fund to coordinate **new media producer missions to Australia and Singapore** in early 2005. The purpose of the missions was to enhance and further enable licensing and export markets for Canadian products in these key new markets. Ten Canadian production companies, along with new media representatives from the Canadian Broadcasting Corporation, the Nova Scotia Film Development Corporation, and the editor-in-chief from the journal *Canadian NEW MEDIA*, participated in the Australian mission. The mission included attendance

at the Australian International Documentary Festival and participation in pitching sessions and roundtables, where delegates had the opportunity to meet co-production partners and funders. Seven delegates went on to take part in the Singapore mission, organized by the CTDO in Singapore, which included pre-arranged meetings, briefings, and a match-making session. At least one participant, Digital Wizards, secured a co-production deal as a result. marblemedia called the event “a terrific growth opportunity for the company...,” adding that “relationships were established and business opportunities have since been forged.”

- Each year, over 7,000 film professionals from 70 countries converge in Santa Monica, California, for the **American Film Market (AFM)**—the largest feature-film trade event in the US. The CTDO in Los Angeles identified a gap in Canadian presence at this influential market, and leveraged Trade Routes funding to build a multi-agency partnership (involving 10 provincial agencies, Telefilm Canada, and the National Film Board) to service the needs of the 200 Canadian film producers, financiers, and distributors who attend annually. The partnership provided Canadian attendees with office space (with reception, meeting space, and a message service), collaborative promotional efforts, market intelligence, and opportunities for business-to-business networking. Results identified in follow-up surveys included completed sales transactions in multiple territories, secured representation for Canadian production companies, and the development of new business relationships.

The multi-agency partnership had successfully managed Canada’s presence at the Market for two years when the AFM was adopted by the International Initiative Advisory Committee (IIAC) as a key trade event for the Canadian film industry. As a result, Canadian attendees now profit from the logistical trade show support, marketing initiatives, and market intelligence sessions offered by the IIAC, which is composed of federal and provincial partners (see “International Initiative Advisory Committee,” p. 29). The CTDO in LA will continue to provide support via the IIAC.

Asia Pacific Strategy

The Asia Pacific region is considered an emerging market for the arts and cultural sector. From April 2002 to March 2005, Singapore served as a pilot “hub” location for the CTDO responsible for prioritizing the delivery of services across this region. Singapore, Australia, South Korea, and Taiwan were identified as priority markets of opportunity; the CTDO provided in-market assistance to and collected market intelligence from them, notwithstanding the limited resources available.

After almost three years in the field, Trade Routes assessed the concept of using a “hub” mission, such as Singapore, for a larger regional market. With only a small core of officers available, Trade Routes must be strategic in its placement of CTDOs at missions abroad. As such, it was decided that a more focused location would have greater potential for impact on international business development for the cultural sector. The office of the CTDO in Singapore was closed on March 31, 2005.

In 2005–06, Trade Routes will consult with its partners to identify the most appropriate location and market for the fifth CTDO position.

Contributions Program

The Trade Routes Contributions Program supports initiatives from organizations in the arts and cultural sector that are linked to the development and implementation of long-term export strategies. The program is delivered by headquarters staff, who manage the assessments and administer payments, and by CTCs across Canada, who meet with companies to discuss their applications.

The Contributions Program has two components: export preparedness and international market development.

Export preparedness assists arts and cultural organizations in becoming more export-ready, and helps them do business and compete on a global scale through a variety of activities. These include:

- professional development in international business;
- first-hand and on-line exposure to markets and their business practices;
- the development of new alliances and financial partnering;
- the development of marketing strategies; and
- the use of innovative advertising tools and approaches.

International market development helps organizations in the arts and cultural sector that are generally export-ready build their capacity for successful international sales. It accomplishes this through activities such as:

- market information and market services;
- feasibility studies;
- strategic support at key trade shows and contact events;
- innovative in-market tools (e.g., virtual trade shows, catalogues);
- incoming and outgoing trade/buyers missions (support for and participation in);
- business-to-business networking at international events; and
- attendance at international trade shows and visits to new markets.

Program Results

Since 2001, \$6.2 million in financial assistance has been provided directly to 221 Canadian arts and cultural enterprises through the Contributions Program (see Annex 1 for a list of recipient organizations). As detailed below, the program experienced a strong and growing demand during this period:

- **2001–02:** Since the program was launched late in the fiscal year (November 28, 2001), only 13 project applications were received, with requests totalling \$1.2 million. Approved financial support of \$225,230 was allocated to five recipients, for an average contribution of \$45,000.
- **2002–03:** One hundred and five project applications were received, with requests totalling \$6.3 million. Approved financial support of \$1,881,406 was allocated to 59 recipients, for an average contribution of \$32,000.
- **2003–04:** Ninety-five project applications were received, with requests totalling \$3.8 million. Approved financial support of \$2,004,895³ was allocated to 67 recipients, for an average contribution of \$30,000. The program was closed on August 15, 2003, due to high demand.
- **2004–05:** One hundred and thirty seven project applications were received, with requests totalling \$4.4 million. Approved financial support of \$2,143,135⁴ was allocated to 90 recipients, for an average contribution of \$22,000. The program was once again oversubscribed, and was closed on February 4, 2005.

Although the maximum an applicant may receive through the Contributions Program is \$100,000, the average contribution over the first four years of the program fell well below this amount, at \$28,000. During this period, the average contribution decreased from \$45,000 in 2001–02 to \$22,000 in 2004–05.

Trade Routes attributes this decline to several factors. First, demand on the program has increased. Second, the program's efforts to support a growing number of applicants through the strategic management of applicant expectations and program funds have resulted in a sharp rise in total approved contributions, and a drop in the average amount requested per project from almost \$100,000 in 2001–02 to \$32,400 in 2004–05.

See Annex 2 for details on the distribution of contributions by sector, and Annex 3 for details on their distribution by province (FY 2001–02 to 2004–05).

³As stated on p. 12, the Contributions Program funding envelope is set at \$2 million annually. In 2003–04, Trade Routes approved financial support of over \$2 million as the result of some projects that were approved early in the fiscal year requiring less financial support than initially projected. The remaining funds were, therefore, re-allocated to new applicants that fiscal year in order to maximize available funding.

⁴In 2004–05, Trade Routes approved financial support of over \$2 million as the result of both re-allocating funds (as during FY 2003–04) and a one-time transfer of \$100,000 from the Community Participation Initiative.

Results of Assistance

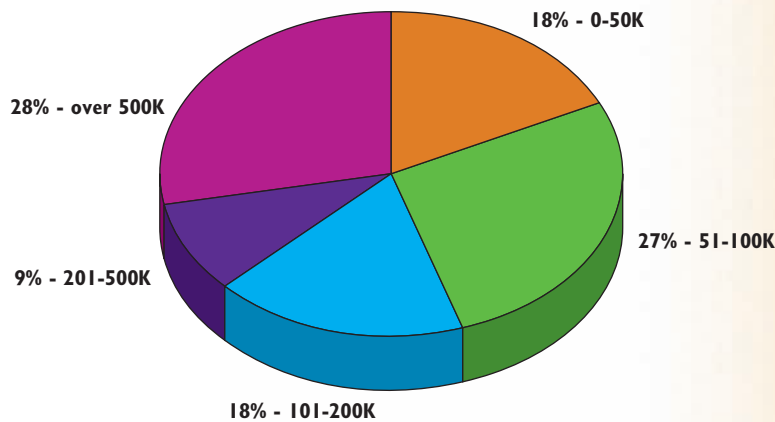
Trade Routes surveys its contributions recipients after their projects have been completed. From 2001–02 to 2003–04, 72 recipients responded to these surveys; a response rate of more than 50 per cent.

Respondents reported success in meeting their export-preparedness objectives. More than 95 per cent reported some success in the areas of partnership development, exposure to markets, and development of marketing materials. Of these, 44 per cent reported a great degree of success in meeting these project objectives.

Survey respondents also reported success in meeting market development objectives. Ninety-five per cent reported some success in the areas of participation at key trade shows/fairs, increasing visibility, market intelligence, business-to-business networking, and sales leads objectives. Of these, 55 per cent reported a great degree of success in meeting these project objectives.

Sales leads have, in many cases, resulted in tangible results. Sixty-three per cent of respondents reported that their projects resulted in sales (see “Reported project results in sales” below), while the remaining 37 per cent foresaw future sales arising as a result.

Reported project results in sales:



Evaluation and Adjustments to the Contributions Program

2001–02

- The Contributions Program officially opened for business when Trade Routes was launched on November 28, 2001. Being announced late in the fiscal year, Trade Routes required a fast start-up, and efforts were made by staff at all levels to meet the program's objectives. The immediate focus of the Contributions Program was the delivery and allocation of funds designated for FY 2001–02 to Canadian cultural SMEs following their successful application.
- A one-pager describing the Contributions Program, its components, contact information, and how to submit a proposal, was developed. TIDD officers, primarily via key contacts and national associations, completed an initial outreach program to inform the Canadian arts and cultural sector about Trade Routes and its mandate.

2002–03

- In February 2003, Trade Routes' management commissioned a survey to assess the results of all projects financed under the Contributions Program. The Survey of Recipients of Trade Routes Contributions Support was designed to meet Treasury Board's requirement that program performance be reported, and to enable management to identify areas for improvement. As it was early in the program life-cycle, only 23 recipients had completed their activities and were, therefore, able to report results. In total, 18 of these responded to the survey. Highlights from the survey report include:
 - nearly half of respondents estimated total sales for their project at more than \$100,000;
 - half of respondents anticipated that more than 40 per cent of their total international sales would be generated by the project for which they received assistance; and
 - the program was perceived to be quite valuable, with most respondents reporting that they would not have been able to undertake their project without financial assistance from Trade Routes.
- The program developed a guideline booklet outlining program eligibility, procedures, and requirements, and revised and updated its Web site.
- Trade Routes' management undertook a thorough review of all administrative procedures, including an assessment of all Contributions Program functions and staff roles and responsibilities. Working with PCH's Centre of Expertise for Grants and Contributions and Finance Branch, the project assessment tools were revised, and additional due-diligence requirements were implemented.

2003–04

- In spring 2003, Trade Routes underwent a formative evaluation by private-sector consultants. Treasury Board requires all new programs to undergo such evaluations to determine whether their design and implementation are adequate and progress is being made towards achieving intended outcomes.

With regard to the Contributions Program, the evaluation found that:

- while program staff indicated that the application guidelines and process had been reviewed and adjusted, further review was needed to ensure their clarity and ease of application; and
- the timeliness of the approval and notification of applicants was widely recognized as an issue of concern and should, therefore, be monitored over the following year to ensure that adjustments made to the approval process in FY 2002–03 were having the desired effect.

An internal contributions review committee was established in response to the results of the formative evaluation. This led to the creation of a new information management system and a streamlined approval process, as well as the integration of more precise due-diligence assessments into project tools. The committee also implemented time standards for communication with clients, to ensure prompt notification of the receipt of application, requests for missing information, and the success/non-success of the application.

2004–05

- The Contributions Program took advantage of the renewal of Trade Routes to re-examine its terms and conditions, and to make changes to the eligibility guidelines that will go into effect in FY 2005–06. These changes include:
 - the addition of a clear statement explaining that municipal governments are ineligible;
 - the addition of a clear statement explaining that incomplete applications will be given 30 days to provide missing information; and
 - the removal of the provision that organizations must have been active for at least one year in order to be eligible to apply.

Research

The Trade Routes Research program area supports targeted studies of specific markets and countries, and surveys and profiles of export patterns for Canadian cultural exporters and cultural trade. Research is managed by staff at headquarters, with the CTCs and CTDOs contributing market research reports from their locations across Canada and around the world.

During the first two years Trade Routes was in operation, the Research program area focused mainly on the analysis of international trade statistics on cultural goods and services for Trade Routes' partners and clients.

Developments Since 2003–04

In 2003–04, the Research unit joined with the Policy and Planning unit of TIDD, and the management function for the program's research activities was developed. Under this new management direction, Research reviewed PCH's partnership with Statistics Canada in the Culture Trade and Investment Project (CTIP), and new resources were committed.

In 2004–05, Trade Routes began a research inventory to track the progress of market briefs, studies, and reports commissioned or being produced by the program. The inventory is regularly updated and shared with TTC-CGS (see Annex 4 for the March 31, 2005, inventory). The first-ever Trade Routes research plan was developed for FY 2005–06.

Trade Routes research reports are posted on the member and non-member sections of the TTC-CGS Web site at www.canadianheritage.gc.ca/TradeTeamCanadaCulture. Information on joining TTC-CGS and gaining access to these reports is available from both Trade Routes (toll free at 1 866-999-7233) and the TTC-CGS secretariat at export_culture@pch.gc.ca.

Culture Trade and Investment Project

Through the CTIP, Trade Routes works in collaboration with Statistics Canada to improve the coverage, quality, and dissemination of international trade data on Canada's cultural products and services.

As part of this project, Trade Routes staff and TTC-CGS working groups identify improvements to the Canadian Framework for Culture Statistics⁵ (Statistics Canada's guide for gathering trade data on the arts and cultural sector). This work includes efforts to ensure that data from all arts and cultural sub-sectors, such as crafts and new media, are included in the framework, and that the framework takes into account the contemporary data needs of all sub-sectors.

Improvements in Statistics Canada's data collection models should lead to more accurate and comprehensive cultural trade data in Canada, as well as facilitate changes to the North American standards developed with the United States and Mexico.

⁵The Statistics Canada document *Canadian Framework for Culture Statistics* is available at <http://www.statcan.ca/cgi-bin/downpub/listpub.cgi?catno=81-595-MIE2004021>

STRATEGIC PARTNERSHIPS

Trade Routes participates in several export development committees and networks in order to facilitate a wide range of strategic international market development initiatives that benefit the arts and cultural sector.

Team Canada Inc

TCI is a virtual network of federal departments and agencies, as well as other partners, that provide integrated delivery to the Canadian business community of the Government of Canada's export programs and services (see "Consultations with Key Partners", p. 9).

The 16 members of TCI include the Business Development Bank of Canada, Canada Customs and Revenue Agency, the Canadian International Development Agency, the Canadian Commercial Corporation, and Statistics Canada.

Since PCH is an executive member of TCI (along with Agriculture and Agri-Food Canada, ITCan, IC, Natural Resources Canada, and Export Development Canada), Trade Routes sits on both its executive committee and management board. Through TCI, Trade Routes has participated in consultations on and the development and review of a number of TCI export tools and initiatives, including the Exportsource.ca Web site and on-line guides, the Program for Export Market Development, and the Brand Canada Program.

Trade Team Canada—Cultural Goods and Services

TTC-CGS is the first and only national consultative body on cultural trade development, and is the industry advisory board for the Trade Routes program (see "Program Governance and Delivery," p. 12).

The 142 members of the TTC-CGS include the Association for the Export of Canadian Books, the Art Dealers Association of Canada, the Canadian Film and Television Production Association, FAC, the Canadian Tourism Commission, the Society for Arts and Technology, and the Canada Council.

The main outputs of the TTC-CGS (aside from consultations) are international trade action plans developed by its working groups. These groups cover eight sub-sectors within the arts and cultural sector: crafts, design, film and television, music and sound recording, new media, performing arts, publishing, and visual arts. Each working group is made up of members from across the sub-sector who are actively involved in exporting, is led by an elected chair from the private sector, and is supported by a Trade Routes officer who acts as its coordinator. The ITAPs developed by the working groups focus on each sub-sector's key geographic markets and priorities for government support. The strategies developed in these plans are used by Trade Routes in delivering its four program areas.

Regional Trade Networks

Trade Routes' CTCs participate in many of the Regional Trade Networks that have been formed across Canada. RTNs are made up of federal, provincial, territorial, and regional governments and industry associations who work together to help SMEs capitalize on available export services. Because of their geographic focus, RTNs strive to build on the strengths and respond to the needs of a specific region's industries, culture, and economy.

RTN members include the Canada/Newfoundland and Labrador Business Service Centre, the Vancouver Board of Trade, Alberta Economic Development, the Canada Economic Development for Quebec Regions, the Asia Pacific Foundation of Canada, and the Saskatchewan Trade and Export Partnership.

Examples of services provided by the RTNs include export financing and insurance, and information on trade missions, fairs, business seminars, and export services delivered by provincial government departments and agencies.

Aboriginal International Business Development Committee

Trade Routes represents PCH on the Aboriginal International Business Development (AIBD) Committee, a partnership of 28 federal government departments and agencies that share an interest in aboriginal export development and access to world markets. The AIBD Committee promotes and facilitates successful export practices among aboriginal entrepreneurs through support for and participation in such activities as the World Summit of Indigenous Entrepreneurs, the Council for the Advancement of Native Development Officers National Conference, and the Nunavut Arts Festival.

The 28 members of the AIBD Committee include the Forum for International Trade Training, the Inter-American Development Bank, the National Aboriginal Economic Development Board, Aboriginal Business Canada, and the Federal Economic Development Initiative in Northern Ontario.

A key tool developed by the AIBD Committee is the Virtual Aboriginal Trade Show (VATS)⁶. Launched in 2002–03, the VATS Web site is an Internet showcase of products and services from a variety of sectors, including arts and culture. Trade Routes is responsible for managing the arts and cultural aisle of VATS, which featured 102 companies by March 31, 2005. This role includes recruiting aboriginal arts and cultural organizations to showcase their work on the portal.

⁶ www.vats.gc.ca

International Initiative Advisory Committee

Trade Routes is also a partner in the International Initiative Advisory Committee (IIAC). Led by Telefilm Canada, the IIAC provides the private film and television sector with marketing and communications support at key international festivals and markets, with the objective of building larger audiences for Canadian film, television, and new media content abroad.

The 13 members of the IIAC include British Columbia Film, SaskFilm and Video Development Corporation, Manitoba Film and Sound, the Ontario Media Development Corporation, the Société de développement des entreprises culturelles, New Brunswick Film, and the Nova Scotia Film Development Corporation.

Since 2002–03, Trade Routes has contributed annually to the organization and staffing of Canadian pavilions at the Cannes Market, MIPCOM, MIPTV, and NATPE. These turn-key facilities are open to Canadian export and production companies on a cost-sharing basis, and offer such services as advertising, reception, audiovisual equipment, information services, market intelligence, key contacts, business leads, and information on co-production treaties.

TRADE ROUTES EVENTS

Trade Routes continues to partner in initiatives that support the Canadian presence at trade events outside Canada or that build the trade component of Canadian industry events. During its pilot period, it also developed and led its own series of events related to export preparedness and international business development.

The Trade Routes Learning Event

Trade Routes was created, in part, to enhance the current programs and services offered by Team Canada Inc, and to tailor them to the needs of Canadian cultural entrepreneurs. As a result of this mandate, a learning event was developed to provide employees in TCI departments (including Trade Routes officers) with specialized training in an increasingly complex range of export development trade services.

The Trade Routes Learning Event took place from March 17 to 19, 2003, at Ryerson University in Toronto. Although the three-day session was originally conceived as a comprehensive event that would cover all industries in the arts and cultural sector, it became evident early in the planning stages that there would not be sufficient time to cover all eight sub-sectors. Instead, the program took a multi-sectoral approach focused on a smaller grouping of sub-sectors.

More than 55 professionals from the film, television, and new media sectors who had diverse experience in the development and management of SMEs led over 20 public sector delegates through an innovative and hands-on look at their industries. Delegates in attendance included Trade Routes staff and representatives from PCH and DFAIT.

The final evaluation was positive, with delegates giving the event an average score of 75 per cent, and one calling it “one of the best training experiences” of their career.

The Canadian Forum on Cultural Enterprise: When Culture Talks Business

The Canadian Forum on Cultural Enterprise: When Culture Talks Business was held in Paris from January 12 to 14, 2004. Organized and hosted by Trade Routes, the event brought together all of the industries in the arts and cultural sector, and was the first of its kind for both Canada and the world.

By conveying the image of a creative, modern, and innovative Canada, the Forum aimed to reposition Canadian cultural exports to France, and to stimulate lasting trade relations between Canada and targeted Francophone markets in Europe and Africa.

The Forum drew 600 participants and featured a full program of plenary sessions, workshops, case studies, presentations, and pre-arranged business-to-business meetings. More than 260 such meetings took place between Canadian entrepreneurs and their European and African counterparts; approximately 100 of them on site. A number of links were established during the many networking activities, which included theme- and sector-focused lunches and cultural presentations.

The following outcomes were identified in follow-up evaluations of the event:

- 12 companies signed contracts;
- 55 companies identified potential contract opportunities;
- 241 companies met with key contacts for future business development;
- 16 companies cited possible distribution agreements; and
- 32 companies outlined future co-production opportunities.

Partners who provided financial assistance and/or content development to the event included DFAIT's Arts and Cultural Industries Promotion Division and Canada-France 2004 Program; IC; Investment Partnerships Canada; Canada Economic Development for Quebec Regions; the Atlantic Canada Opportunities Agency; PCH's Cultural Affairs, Public Affairs and Communications, International and Intergovernmental Affairs, Publishing Policy and Programs, and Film, Video and Sound Recording branches and its Canadian Culture Online and Canadian Cultural Observatory programs; TTC-CGS; TCI; the Canadian Conservation Institute; the United Nations Educational, Scientific and Cultural Organization; and Forum Francophone des Affaires.

Export Development Seminars for Music and Sound Recording

In January 2004, Trade Routes took a Canadian delegation that was travelling to the MIDEM international trade show in Cannes, France, and paired it with key music contacts in London for a series of cutting edge, pre-event music industry seminars and networking opportunities.

The seminars focused on practical and timely ways to develop international markets for Canadian musicians. Locating the event in a European cultural centre and timing it for the week prior to a major industry event provided valuable insight into how Canadian musicians could access opportunities in the United Kingdom.

The same approach was applied twice the following year. In September 2004, Trade Routes partnered with the Canadian Embassy in Berlin, ITCan, and the Canadian Independent Record Production Association to develop and deliver a seminar the day prior to the Popkomm International trade show. The event, which paired Canadian music SMEs with 46 industry participants from Germany, featured panel discussions and more than 200 pre-scheduled business-to-business meetings.

In January 2005, Trade Routes repeated the format for MIDEM in Cannes, this time pairing the Canadian delegation with 85 key industry contacts from France at a pre-show seminar in Paris. A post-event survey indicated that 88 per cent of respondents were satisfied to highly satisfied with the market information they obtained during the event; 87 per cent said they wished that a similar event would be held in Paris, Cannes, Lille, Montreal, Toronto, New York, or Los Angeles in the future.

In total, more than 100 Canadian companies participated in these strategic initiatives.

It is not often that I receive unanimously positive feedback from record industry people but it certainly happened with the pre-MIDEM music symposium at Canada House. The timing was impeccable, the programming was pertinent, and the dynamic Canada/UK information flow was invaluable.

–Brian Robertson, President, Canadian Recording Industry Association

LOOKING AHEAD

The pilot phase of the Trade Routes program has presented some challenges, as well as a number of opportunities to learn from experience. Indeed, many lessons were learned as challenges were overcome. Trade Routes is now building on four years of design and development in the promotion of Canada's arts and culture sector.

The program's focus will remain:

- To provide targeted trade support to Canadian arts and cultural entrepreneurs;
- To work with our partners in delivering the long-term strategic planning required for arts and cultural industries to compete and succeed internationally.

The four core program areas—Market Entry Support, In-Market Assistance, Contributions and Research—have proven their effectiveness during the Pilot Phase and are now established as some of the essential tools to reach and conquer international markets.

In the future, Trade Routes will endeavour to achieve greater success in a number of other strategic areas, including:

- **Emerging Markets:** Canada recognizes the immense possibilities in the emerging markets of countries such as China, Brazil and India. Trade Routes, in partnership with the TTC-CGS, will strive to identify and capitalize on the opportunities presented by these markets for Canada's arts and cultural entrepreneurs. In conjunction with these efforts, Trade Routes will work with its partners to relocate the fifth CTDO position to a new location in the Asia Pacific region in winter 2005.
- **Improving Program and Service Delivery:** Trade Routes is continuously refining its processes and deliverables to ensure that the program remains focussed on the achievement of its mandate, in the most advantageous and value-added means possible.
 - In 2005–06, Trade Routes will launch a prototype database that will capture data and performance indicators from all business lines. This centralized system will result in faster responses to internal and external information requests, and will enable the program to gather baseline data more efficiently, thereby allowing for comparative analysis from year to year;
 - A preliminary study by Consulting and Audit Canada will be conducted in Spring 2005 to establish the necessity of a full program audit; and,
 - As a follow-up to the 2003–04 formative evaluation, Trade Routes will undertake a summative evaluation in 2006–07 to assess its success, impact, cost-effectiveness, relevance, and rationale.

- **Working Closely With The Cultural Industries:** Success requires the further expansion of existing partnerships and the establishment of new collaborations. Trade Routes will support the TTC-CGS as it re-examines its mandate, communications strategy, deliverables, and membership outreach. Trade Routes will continue to work with industry and partners to identify new opportunities that offer the greatest potential benefit to the Canadian arts and cultural industries.

The next phase of Trade Routes will contribute to the enhancement of the already vibrant Canadian arts and cultural industries and support them in gaining the prominence they deserve on the international scene.

ANNEXES

Annex 1

Trade Routes Contributions Program: Recipients FY 2001–02

<i>Name</i>	<i>Funds Committed To Project *</i>
174085 Canada Inc. Productions MAJ	\$58,350.00
Association québécoise de l'industrie du disque du spectacle et de la vidéo (ADISQ) Inc.	\$26,880.00
Cheval Théâtre Inc.	\$50,000.00
Conseil des métiers d'arts du Québec	\$70,000.00
Royal Conservatory of Music (The)	\$20,000.00
Total	\$225,230.00

* Actual expenditures may vary according to projects' progress.

Trade Routes Contributions Program: Recipients FY 2002–03

<i>Name</i>	<i>Funds Committed To Project *</i>
Acacia House Publishing Services Ltd.	\$10,000.00
Alliance Numérique Réseau de l'Industrie Numérique du Québec	\$15,000.00
Association for the Export of Canadian Books (The)	\$42,275.00
Atlantic Digital Media Festival Society	\$46,125.00
Ayotte Drums Inc.	\$33,500.00
Banff Television Foundation	\$75,000.00
Beauregard & Associés Ltée.	\$19,800.00
Canadian Crafts Federation	\$24,390.00
Canadian Film and Television Production Association	\$55,850.00
Canadian Recording Studios Inc.	\$11,361.30
Catriona Jeffries Gallery	\$25,000.00
Conférence internationale des arts de la scène de Montréal (CINARS)	\$20,000.00
Corona Jewellery Company	\$15,000.00
Distraction Formats 2000 Inc.	\$34,500.00
Douglas & McIntyre Ltd.	\$18,150.00
East Coast Music Association	\$45,000.00
Éditions les Allusifs (Les)	\$20,000.00
Endless Entertainment Inc.	\$9,500.00
Entreprises Cogni-Science 2000 Inc.	\$46,000.00

Francofête en Acadie Inc.	\$43,000.00
Galerie d'Art Jean-Claude Bergeron	\$10,000.00
Galerie Éric Devlin Inc.	\$23,411.76
Galerie Gora—Art Contemporain	\$23,100.00
Gens D'R (Les)	\$15,000.00
Groundwood Books Limited	\$39,270.00
Hot Docs	\$100,000.00
IIDEX/NEOCON Canada	\$25,000.00
Impact Communications Ltd.	\$50,000.00
Key Porter Books Ltd.	\$50,000.00
KidsWeb TV Inc.	\$45,563.00
Kiss Me Baby Productions (1975) Ltd.	\$20,000.00
Kootenay School of the Arts Cooperative	\$20,000.00
Loup de Gouttière Inc. (Le)	\$25,000.00
Marché international du film, de la télévision et de la vidéo de Montréal Inc.	\$50,000.00
MC2-Extase Inc.	\$18,360.00
McIntyre International Arts Management	\$33,428.00
Montreal Electronic Groove Inc.	\$20,000.00
Music Industry Association of Nova Scotia	\$10,000.00
Novita Techne Limited	\$24,386.00
Off the Wall Productions Ltd.	\$50,000.00
Olesia Records	\$66,660.00
Plastic Buddha Inc.	\$6,198.01
Production Jeux de Mots Inc.	\$24,500.00
Prospero Entertainment Corporation	\$65,000.00
PTV Productions Inc./Releasing Inc.	\$17,350.00
Royal Winnipeg Ballet (The)	\$15,000.00
Science North	\$76,112.25
Six Stages Theatre Events	\$50,000.00
Société Nationale de l'Acadie Inc.	\$2,175.00
Someone Else International	\$40,000.00
Spectra International Distribution Inc.	\$13,176.00
Spectra International Distribution Inc.	\$45,000.00
Stringer Marketing & Media Inc.	\$50,000.00
Sulyma Productions Inc.	\$20,000.00
Sunshine Records Ltd.	\$47,700.00

Themes & Variations Inc.	\$30,000.00
Triune Productions Inc.	\$23,000.00
Vector Musical Instruments Ltd.	\$2,565.00
Vertigo Verre Soufflé Inc.	\$25,000.00
Total	\$1,881,406.32

** Actual expenditures may vary according to projects' progress.*

Trade Routes Contributions Program: Recipients FY 2003–04

Name	Funds Committed To Project *
Allan E. Kiesler Inc.	\$38,025.00
Artcore Gallery Ltd.	\$30,600.00
Association des galeries d'art contemporain de Montréal	\$35,912.00
Atlantic Presenters Association Inc.	\$48,000.00
Azure Publishing Inc.	\$35,000.00
Banff Television Foundation	\$35,000.00
Canadian Arts Presenters Association	\$38,325.00
Canadian Independent Film Caucus Vancouver	\$15,000.00
Canadian International Performing Arts Touring	\$35,000.00
Canadian Stage Company (The)	\$50,000.00
Canadian Theatre Festival Society	\$55,000.00
Chamber Concerts Canada	\$25,000.00
Cirque Eloize	\$35,000.00
Conférence internationale des arts de la scène de Montréal	\$18,250.00
Consortium Format Géant	\$15,300.00
Craft Association of British Columbia	\$20,426.00
Dance Umbrella of Ontario	\$7,745.00
Design Exchange	\$50,000.00
East Coast Music Association	\$51,150.00
Entreprises Cogni-Science 2000 inc.	\$19,680.00
Fashion Design Council of Canada	\$25,000.00
Folk Alliance Canada	\$22,000.00
Folquébec	\$21,000.00
Galerie Eric Devlin Inc.	\$14,121.00
Greater Vancouver International Film Festival Society	\$15,000.00
Groupe Analekta Inc.	\$45,000.00
Helen Zenith Gallery Inc.	\$20,000.00
Hot Docs	\$60,000.00

Hushion House Publishing Ltd.	\$45,120.00
IIDEX/NEOCON Canada	\$25,000.00
Institut du design Inc.	\$50,000.00
Key Porter Books Ltd.	\$20,000.00
KidsWeb TV Inc.	\$14,314.00
Kutoka	\$19,000.00
Loup de Goutière Inc., (Le)	\$15,000.00
Marché international du film, de la télévision et de la vidéo de Montréal	\$25,000.00
Marisol Sarrazin Productions Inc.	\$27,090.00
McIntyre International Arts Management	\$28,000.00
Media Awareness Network	\$43,414.00
Médiathèque du Design Inc., (La)	\$25,000.00
Monte Clark Gallery Inc.	\$7,500.00
Mutek	\$45,000.00
National Screen Institute—Canada	\$60,000.00
Newfoundland & Labrador Publishers Association Inc.	\$15,045.00
Nice Music Inc.	\$29,800.00
Nova Scotia Designer Crafts Council	\$84,120.00
Novita Techne Limited	\$24,387.00
Pacific Music Industry Association	\$17,625.00
Pari Nadimi Gallery	\$13,690.00
Pixcom International Inc.	\$25,000.00
Plastic Buddha Inc.	\$33,314.99
Primitive Entertainment Inc.	\$20,000.00
Public Nature Corporation	\$19,838.00
Royal Conservatory of Music (The)	\$21,309.00
Ruth Cansfield Dance Company Inc.	\$33,000.00
Smallman Records	\$22,244.00
Société Nationale de l'Acadie Inc.	\$65,000.00
Someone Else International	\$30,000.00
St. John's International Women's Film and Video Festival Inc.	\$14,900.00
Sudden Storm Productions Inc.	\$25,000.00
Themes and Variations	\$30,000.00
Triune Productions Inc.	\$12,770.00
University College Drama Program	\$13,650.00
VDC Dance Centre Society, (The)	\$30,000.00
Vector Musical Instruments Ltd.	\$19,230.00

Vues d'Afrique	\$30,000.00
Western Canadian Music Alliance Inc.	\$45,000.00
Total	\$2,004,894.99

* Actual expenditures may vary according to projects' progress.

Trade Routes Contributions Program: Recipients FY 2004–05

Name	Funds Committed To Project *
23YYZEE Inc.	\$13,000.00
9084-7344 QUEBEC INC (Éditions les Allusifs)	\$24,625.00
À l'infini Communications	\$6,000.00
Acacia House Publishing Services Ltd	\$13,300.00
Alberta Ballet Company (The)	\$6,234.00
Alca Productions Inc.	\$20,000.00
Allan E. Kiesler Inc.	\$21,275.00
Amok Artist Agency Inc.	\$18,500.00
Arbor Records Limited	\$27,500.00
Associated Designers of Canada—Theatre, Television, Film	\$37,800.00
Association of Registered Interior Designers of Ontario	\$54,000.00
Atlantic Film Festival Association	\$20,000.00
Azure Publishing Inc.	\$22,776.00
Beaverbrook Art Gallery (The)	\$19,000.00
Bell Broadcast and New Media Fund	\$20,000.00
C.O.B. Conceptual Films/1346857 Ontario	\$19,000.00
Canadian Arts Presenters Association	\$34,975.00
Canadian Country Music Association	\$43,500.00
Canadian Film Centre	\$25,000.00
Canadian Organization of Campus Activities (COCA)	\$19,946.00
Canadian Theatre Festival Society	\$35,000.00
Collections Mariouche Inc. (Les)	\$20,000.00
Collideoscope Digital Productions Inc.	\$8,798.58
Compagnie Marie Chouinard (La)	\$18,000.00
Conférence internationale des Arts de la scène de Montréal	\$20,000.00
Conseil des Métiers d'Arts du Québec	\$34,650.00
Consortium format géant	\$40,000.00
Coup de cœur francophone	\$27,000.00
DB Entertainment	\$20,000.00
Decode Entertainment Inc.	\$25,000.00

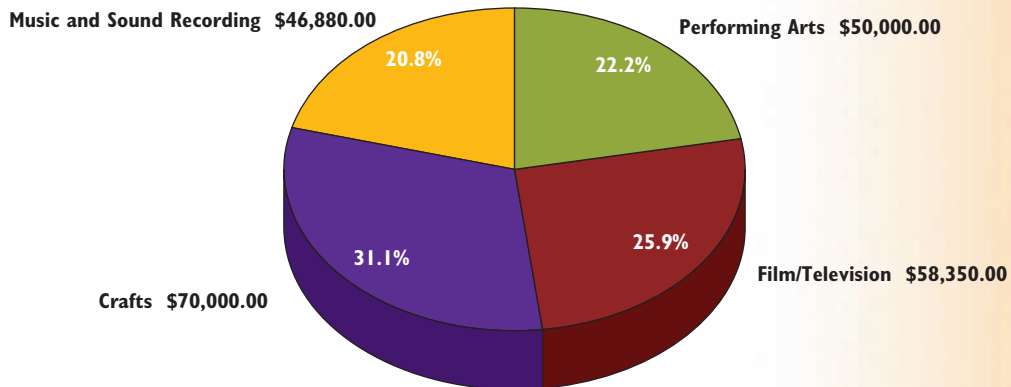
Deux Mondes, Compagnie de Théâtre (Les)	\$15,000.00
Disques Atma Inc.	\$10,000.00
Distribution Nétima Ltée (Les)	\$21,000.00
DynamO Théâtre	\$14,996.00
Earl Rosen and Associates Ltd.	\$46,200.00
East Coast Music Association	\$50,250.00
Éditions la courte échelle (Les)	\$20,000.00
Emma Scott Design Inc.	\$30,600.00
Endearing Publishing Inc.	\$18,400.00
Eponymous Productions and Art Society	\$31,698.00
Fashion Designers Council of Canada	\$25,000.00
Folk Alliance Canada	\$32,888.00
Galerie d'Art Jean-Claude Bergeron Inc.	\$6,900.00
Galerie Elena Lee /164677 Canada Inc.	\$16,500.00
Galerie Éric Devlin Inc.	\$10,000.00
Gestion Pierre Gravel Inc.	\$23,056.00
Greater Vancouver International Film Festival Society	\$15,000.00
Groupe Conseil Son et Musique (Le) (L'École du Show Business) Inc.	\$38,100.00
Hot Docs	\$35,000.00
John Lambert and Associates Inc.	\$40,019.00
KidsWeb TV Inc.	\$30,000.00
Kutoka Interactive Inc.	\$35,000.00
Lab)idéeclit!	\$25,000.00
Latitude 45 Arts Promotion Inc.	\$22,413.00
Lock-Danseurs Inc.	\$35,000.00
Marché international du film, de la télévision et de la vidéo de Montréal Inc.	\$100,000.00
Marisol Sarrazin Productions	\$19,914.00
Marquis Entertainment Inc. / 1381167 Ontario Limited.	\$20,081.00
McIntyre International Arts Management / (1383068 Ontario Ltd).	\$20,000.00
Médiathèque du Design Inc., (La)	\$35,000.00
Menno Plukker Theatre Agent Inc.	\$20,000.00
Montréal Électronique Groove Inc.	\$30,000.00
Mutek	\$34,750.00
Mystic Productions Inc.	\$25,000.00
National Screen Institute Canada—Winnipeg	\$25,000.00
New Media BC	\$15,000.00

Octant Vision Inc.	\$8,998.00
Off the Wall Productions Inc.	\$29,000.00
Okanagan Artists Alternative Association	\$7,500.00
Option Art/80799 Canada	\$15,000.00
Other Gallery Inc. (The)	\$16,050.00
Pacific Music Industry Association	\$13,000.00
Pari Nadimi Gallery / 2012112 Ontario Limited	\$11,505.00
Partners in Motion Pictures Inc.	\$35,000.00
Pixcom International Inc.	\$21,000.00
Rising Sun Productions	\$24,100.00
Second Story Feminist Press Inc.	\$10,000.00
Société Nationale de l'Acadie Inc.	\$33,817.00
Someone Else International Inc.	\$5,250.00
Spectra International Distribution Inc.	\$18,000.00
Studio B Entertainment Inc.	\$20,000.00
Tatar Gallery Inc.	\$11,750.00
Théâtre Pigeons International	\$10,500.00
Toronto Blues Society	\$9,150.00
Touchstone Theatre Society	\$10,000.00
Triune Production Inc.	\$15,000.00
Troupe du théâtre de quartier (La)	\$23,400.00
Two Planks and a Passion Theatre Association	\$35,000.00
Victoria Independent Film and Video Festival	\$13,000.00
Western Canadian Music Alliance	\$39,470.00
Total	\$2,143,134.58

** Actual expenditures may vary according to projects' progress.*

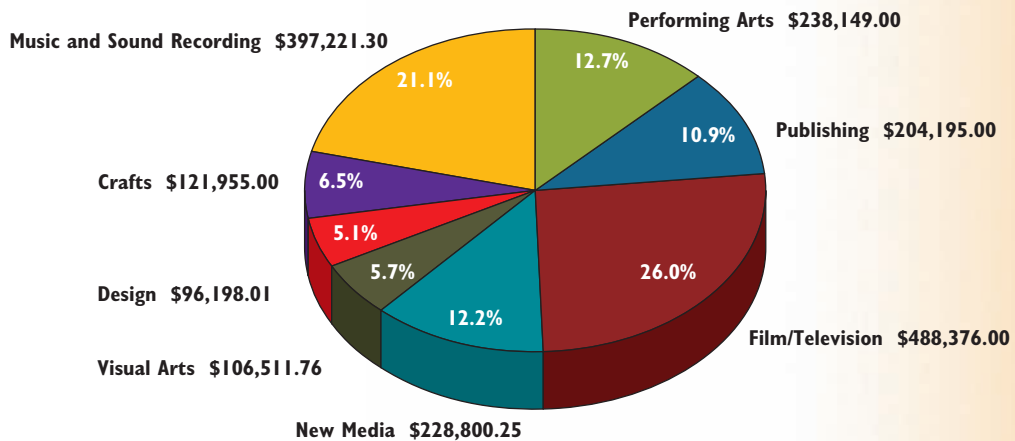
Annex 2

Trade Routes Contributions Program: Distribution of Contributions by Sector FY 2001–02



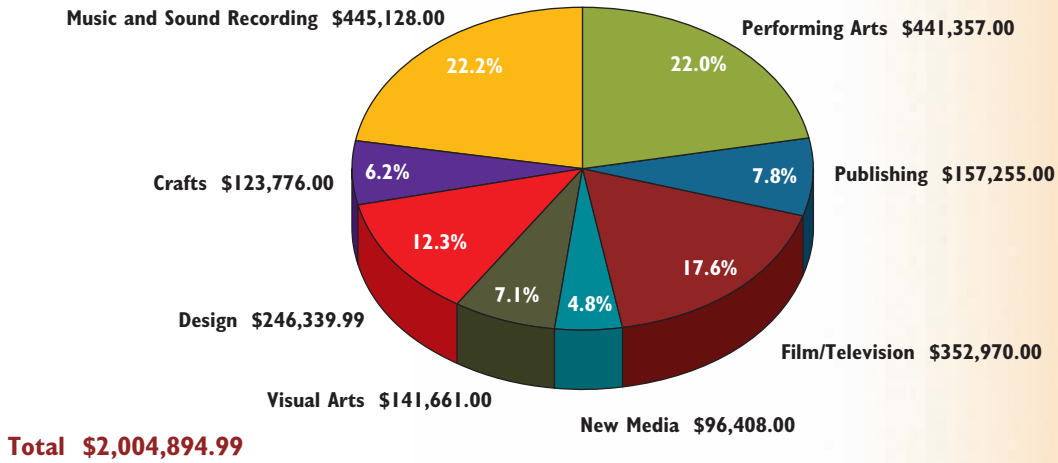
Total \$225,230.00

Trade Routes Contributions Program: Distribution of Contributions by Sector FY 2002–03

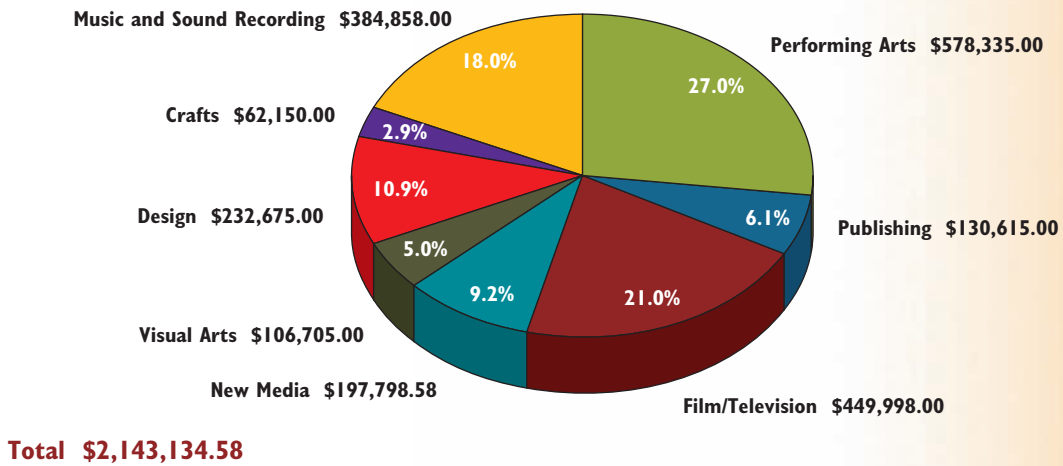


Total \$1,881,406.32

**Trade Routes Contributions Program:
Distribution of Contributions by Sector FY 2003–04**

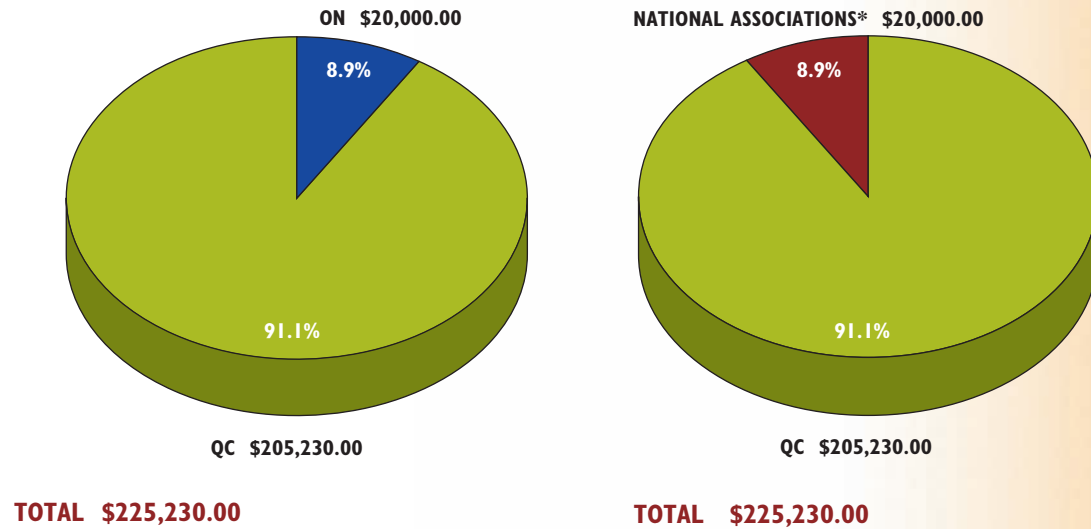


**Trade Routes Contributions Program:
Distribution of Contributions by Sector FY 2004–05**

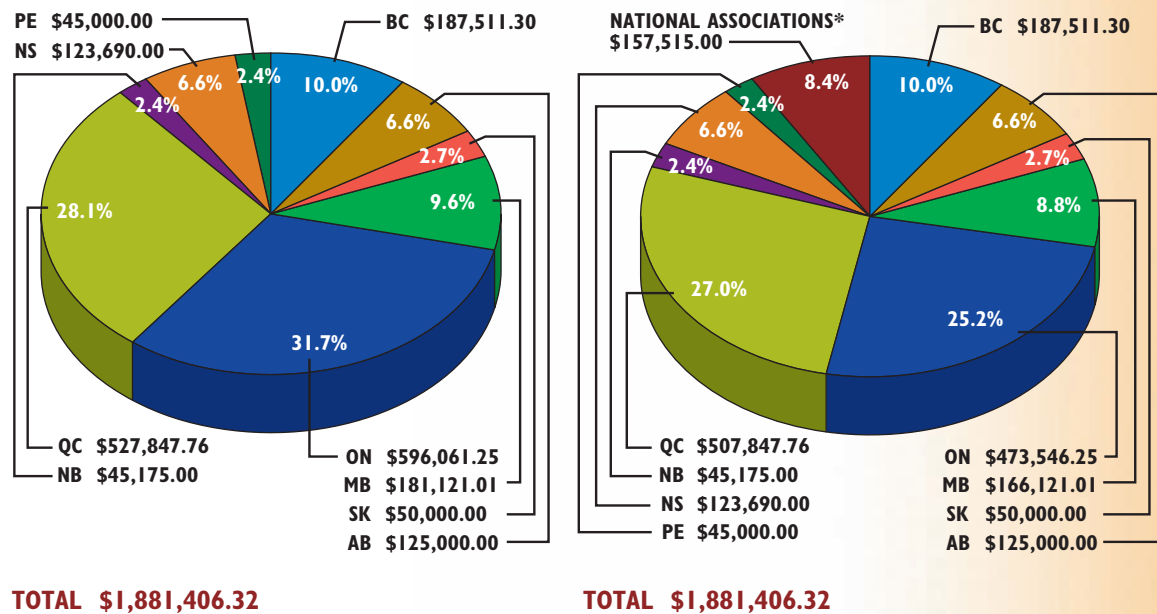


Annex 3

Trade Routes Contributions Program: Distribution of Contributions by Province FY 2001–02

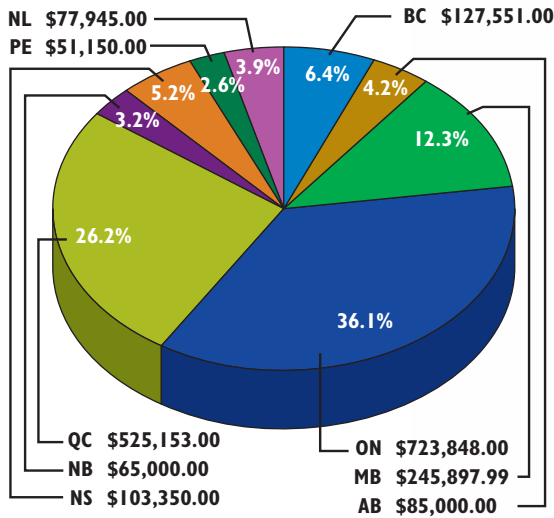


Trade Routes Contributions Program: Distribution of Contributions by Province FY 2002–03

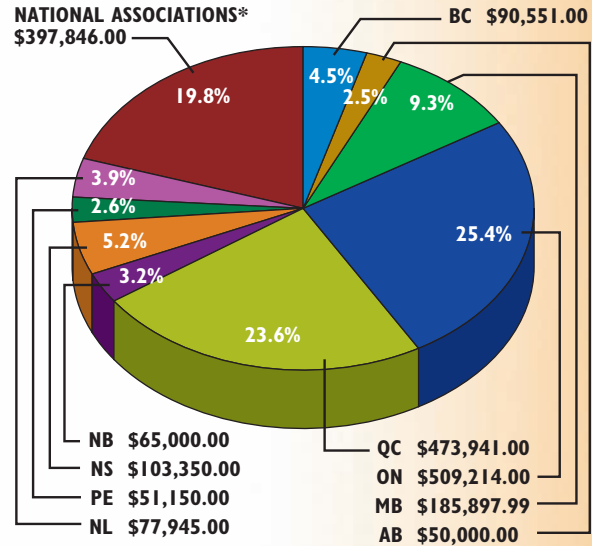


*In order to provide a more precise provincial distribution of the Trade Routes Contributions Program, contributions to National Associations, whose activities are intended to benefit a national membership, have been identified separately from their provincial category (of where their main offices are located).

**Trade Routes Contributions Program:
Distribution of Contributions by Province FY 2003–04**

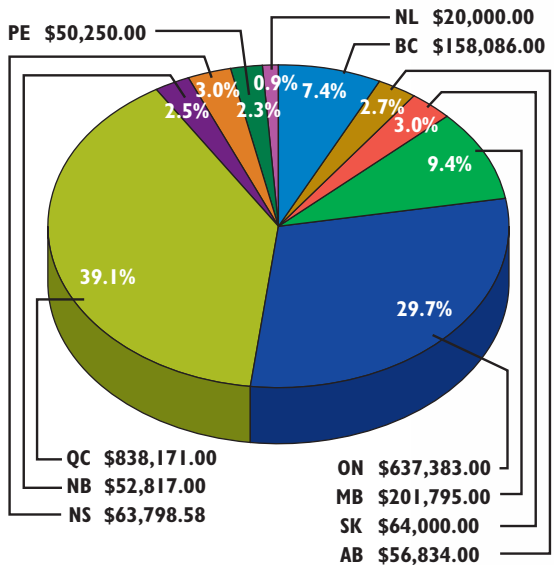


TOTAL \$2,004,894.99

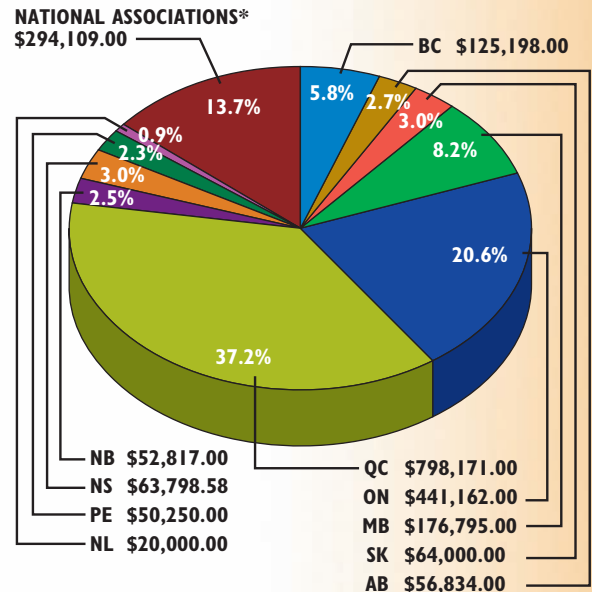


TOTAL \$2,004,894.99

**Trade Routes Contributions Program:
Distribution of Contributions by Province FY 2004–05**



TOTAL \$2,143,134.58



TOTAL \$2,143,134.58

*In order to provide a more precise provincial distribution of the Trade Routes Contributions Program, contributions to National Associations, whose activities are intended to benefit a national membership, have been identified separately from their provincial category (of where their main offices are located).

Annex 4

TRADE ROUTES RESEARCH INVENTORY (March 31, 2005)

Completed and on the TTC CGS Website

<i>Report/Study Title</i>	<i>Date</i>	<i>Description</i>
Four Cultural Trade Profiles: France, Germany, Italy and United Kingdom	December 2002	Each profile provides an overview of the country's trade and its cultural trade relationship with Canada. In addition, each one discusses cultural trade opportunities of relevance to particular sectors.
Administrative Procedures Affecting Market Access for Canadian Cultural Industries	January 2003	The report focuses on the issues faced by members of the cultural community in applying for specific visa categories related to arts occupations
Eastern United States of America – Market Study	March 2003	Focuses on the states of New York, New Jersey and Connecticut. The report defines problems/issues for cultural exporters, analyses reasons for success and discusses the competitive environment in those states.
The Visual Arts Market in the Tri-State Areas for Canadian Art Galleries – Market study	March 2003	The sections throughout the report provide galleries with an overview and history of art fairs, the New York art scene, and current trends and activities of the New York art market.
The Country Music Market in Australia – Market study	March 2003	The report provides information on general industry trends and issues; content quotas; market access issues; key players in the Australian country music business (producers, promoters, and distributors); country music radio and television programming; country music in Australia and business opportunities for Canadians.
Statistics on Canadian Music in the UK	July 2003	A short statistical report that was prepared based on data obtained from the British Phonographic Industry.

The Southern Compass: A Guide to Touring Australia & New Zealand – How-to Guide	May 2004	This how-to guide provides “How To” information on the live touring opportunities for Canadian artists in Australia and New Zealand. The guide includes a description of music genres, locations, recommended steps, general requirements, recording industries, and key contacts.
Working in the Music Industry in the United Kingdom: A practical guide for Canadian companies and artists in Rock & Pop and Folk, Traditional & World Music – How-to Guide	March 2004	This report has been produced with Canadian music professionals in mind, from artists, agents and labels to producers, publishers and managers. The purpose of this report is to foster new initiatives and business opportunities for Canadians working in two collective genres: rock & pop folk and traditional & world music.
Summary: Database of U.S. Produced Films Based on Literary Source Material, 1998–2003	Spring 2005	This summary provides Canadian book publishers and authors with insights into the market for literary adaptations while also providing Canadian film producers who specialize in literary adaptations with insights into the market for their films.

Future Reports

<i>Report/Study Title</i>	<i>Date</i>	<i>Description</i>
UK Interior Design Sector – Market study	Fall 2005	The main objective of this report is to provide relevant, current and practical market information to Canadian designers and companies interested in exporting their design products and services to the United Kingdom.
Contemporary Art Exporter’s Guide to France – How-to Guide	Fall 2005	This practical guide includes the following themes: France’s cultural policy from 1998 to 2002, the market for visual arts, galleries, how to promote Canadian works in France, national events related to visual arts, patrons and foundations, communications and media, logistics and French law, sale of original works, accommodation and hospitality, launching a gallery in France, as well as contacts and official sources.

The Cultural Industries in Argentina – Market reports	Summer 2005	The first market brief presents an overview of the cultural industries in Argentina while the other four target the following cultural sub-sectors: music, film and television, books and publishing, and performing arts. They include market overview, opportunities, trade shows, key participants, private and public sector customers, key contacts and support services, bibliography, and a list of useful internet sites.
The UK Classical Music Market	August 2005	The study is intended for Canadian music labels, producers, and musicians working in classical music and interested in the UK market.
Sound Recording (jazz) in Singapore – Market report	August 2005	This report provides an overview of the music industry in Singapore with a special focus on the jazz genre, including identifying appropriate presenters, venues and key events held throughout the year.
Performing Arts in Singapore – Market report	August 2005	The report provides an in-depth overview of the performing arts sector in Singapore and its potential business opportunities for Canadian performers and agents. It highlights the logistics required for foreign performances, consumption trends, opportunities and the key events that are held in Singapore annually. A list of the local key players can also be found.
Digital Content Industry in Korea – Market brief	August 2005	Will focus on gaming and 3D animation.
Film and Television Sector in Singapore – Market report	May 2005	The report provides a detailed overview of the film and television market in Singapore (production, distribution and theatrical exhibition) and identifies the potential business opportunities within Singapore and in the region.

Design Sector in Singapore – Market brief	August 2005	Focusing on fashion, graphic, architectural and household product design, the report will provide an overview of this sector in Singapore and its potential business opportunities, including the identification of key players and buyers.
Interior Design Trends in Asia Pacific – Presentation deck	August 2005	This presentation will identify the opportunities for Canadian service providers in this design sub-sector.
Niche Connections in Crafts – Market report	August 2005	A study of niche connections is needed to map alternative distribution channels both nationally and internationally. The challenge is to identify the events, networks, media, collector groups and themes as well as analyze opportunities.
Road Signs – How-to Guide	to be confirmed	This updated version of a touring manual that was first developed in 1987 will be more comprehensive and will provide essential information on contracts, visa, customs, transport, accommodation, medical and cargo data etc, from actual tours.
Completion Bond and Financing Tools in the Audio-Visual Industry – Market report	August 2005	The objective of the study is to determine the existence of a viable business model in the audio-visual industry for the completion bond and for financial instruments meant to increase cash flow. It is directed to Canadian private and public stakeholders of the audio-visual industry.
Design Market in New York – Market report	May 2005	The report is directed to Canadian furniture designers and manufacturers who have developed or are developing export capabilities. It provides insight and strategies for Canadian designers and manufacturers on how to access and generate sales in the New York marketplace. This report is primarily intended to be a guide for new designers entering the market.

Music Distribution in the Southwest US – Market study	July 2005	The study offers an overview of the music distribution in the U.S. Southwest, outlining options for Canadian labels and distributors. In addition, the study offers a quick-reference chart of independent distributors, with areas of specialization, labels currently handled and key contact info. Report currently being updated.
Licensing Music Used in Hollywood Films and TV Productions: Opportunities for the Canadian Music Industry – Market research	May 2005	This study is aimed to Canadian professionals working in the music, film and television sub-sectors. More specifically, the study will examine the US market with a focus on two key points of market access: Los Angeles and New York City. A list of contacts will also be included.
Niche Market of Culturally Diverse Film and TV Productions (U.S.) – Market research	to be confirmed	This study is aimed to Canadian distributors and broadcasters of the film and television industries and will cover the Southwest America market. The study will identify the distributors and broadcasters of diversity programming and will include the resources available in developing diversity-related material.
The Children’s Book Market in the United Kingdom – Market report	May 2005	This report, commissioned jointly with the AECB, will identify existing business opportunities in the UK market, present statistical data and provide practical information to publishers interested in the UK market. An appendix with key contacts will be included.
The Computer Game Industry in the United Kingdom – Market report	to be confirmed	This report should present some key information to games developers interested in exporting in Europe and in the UK in particular. The report will present statistical data and key information to better understand and appreciate existing and future opportunities in the UK gaming market.

Market Studies on
Performing Arts
in the United Kingdom
(theatre & dance)

Fall 2005

The main objective of this project is to provide relevant market information to professionals in the Canadian theatre and dance industries. The information will help them to develop their career and/or export their productions and new plays to the United Kingdom.

The Brazilian Cultural
Industries
– market studies
(performing arts, music,
books and publishing, and
film and television)

Fall 2005

These studies are aimed to Canadian cultural entrepreneurs who are interested in the Brazilian market. They target the following cultural sub-sectors: performing arts, music, books and publishing, and film and television.
