

Canadian Presence Abroad . . .

In the emerging global knowledge-based economy, intellectual capital has displaced natural resources as a primary determinant of economic strength and competitiveness. Canada's education and training services industry can play an important role in helping Canadians acquire the knowledge and skills needed to find jobs in this new economy. This Overview of the education and training services industry gives a general picture of the strengths, weaknesses and prospects of this industry sector so that providers and governments can develop practical approaches to strengthen the industry.

Canada has enormous opportunity — and the capability — to establish leadership as a world class supplier of education and training services. In particular, Canada has an international reputation in providing second language training (both English and French as a second language), petroleum industry training, management development, public administration, consulting engineering and telecommunications. Historically, however, Canadian suppliers have tended to bid on projects that have already been identified and put up for tender, rather than to work actively to develop new international markets.

On-site presence in foreign countries, combined with a more co-ordinated industry approach to the international market, is becoming necessary for countries wishing to increase sales of their education and training services. Canada's major competitors (Australia, the United Kingdom, France, and the United States) have adopted nationally co-ordinated and aggressive international marketing strategies. The United States Information Service has 211 offices in 147 countries to promote U.S. education and training services. Australia operates more than 30 overseas education offices, and in 1996 the Australian government launched a \$700 000 promotional campaign in key Asian markets, and committed \$18.5 million to promote its education and training services internationally. The co-ordinated, on-site, central approach to the international marketplace has been most successfully practised by the British Council, which has encouraged international trade in British education and training services. With 228 offices and 95 teaching centres abroad, the British Council has representation in 109 countries. It has been estimated that United Kingdom education and training exports already account for 4 percent of invisible exports. As for France, the "Alliance Française," with 1 058 associations in 132 countries, acts as an indirect marketing channel for French education and training services.