

Overall, the narrow project focus of the past is giving way to a broad sectoral approach. MDB- supported projects will focus more on institutional development, including strengthening educational administration and the regulatory framework for education, with emphasis on the integration of education within economic reform programs. Education projects are taking more account of outcomes, with greater attention being given to areas such as project monitoring and evaluation, effectiveness indicators, and cost-benefit analyses. At all levels, greater attention is being given to the education of young women as well as women in the work force.

4.3 U.S.A., MEXICO, EUROPE, GERMANY, GREAT BRITAIN, AUSTRALIA

4.3.1 Education and Training Realities

4.3.1.1 The United States

The United States is a key market for Canadian training companies, with 66 percent of exporters selling their products or services there. Since 1983, the amount that U.S. employers spend on formal training for their employees has risen by nearly 20 percent, but has not kept pace with the rising number of workers. Using U.S. Bureau of Labour Statistics data, the American Society for Training and Development (National Report on Human Resources, Washington, D.C. : ASTD, September 1996) estimates that in 1995 U.S. employers spent U.S. \$55.3 billion on training. Of that amount, U.S. \$26.4 billion was spent on direct training costs, and U.S. \$28.9 billion was spent on indirect costs including wages, salaries and fringe benefits of persons being trained while away from their job. Expenditures by the private sector accounted for the vast majority of costs : U.S. \$25.2 billion on direct training costs and U.S. \$27.1 billion in indirect costs. In 1995, U.S. federal government agencies spent an estimated U.S. \$1.2 billion on direct training costs and an estimated U.S. \$1.8 billion on indirect costs.

A 1994 study for the Canadian Embassy in Washington ("U.S. Market Report : Commercial Education and Training Services : A Guide for Canadian Firms Doing Business in the Mid-Atlantic U.S.," Washington, D.C. : April 1996) estimates that the U.S. market for education and training products that year was U.S. \$52 billion. Of this amount, commercial firms spent almost 20 percent (U.S. \$10.3 billion) on consulting training and education including seminars, computer-based training and packaged training programs. This represents a 4-percent increase over the previous year's level in training purchased from consulting education and training firms.