

large companies benefit from alliances with small independents because of their creative material.

Public/private partnering needs to be increased. As the public education system is constantly faced with budget cuts, public/private partnerships are increasingly being considered as a viable way of delivering up to date and flexible curricula to meet the work force's ever changing skills requirements.

A study of the best practices of 14 Canadian education and training firms (Hill Sloan Associates Inc., Commercial Education and Training Services Sector Campaign : Best Practices Project, Ottawa : Industry, Science and Technology Canada, 1992) indicates that the business growth strategies of these firms reflect "their organisational flexibility through participation in networks and alliances" among other key successful growth factors. Alliances enable smaller companies to compensate for their lack of the capital and accumulate know-how needed to prepare and submit tendered bids and to finance resulting projects.

4.5.6 Lack of Technological Sophistication of Users

Although the supply of learning tools available on the market is expected to increase, Industry Canada's 1996 market assessment study for NMLM mentioned above reports that the level of technological knowledge of workers, trainers and managers significantly hinders their adoption. Some industries that could represent large potential markets for NMLM still lack both the equipment and familiarity with computer based technologies. The up front costs of automating and transferring course content to new technologies, combined with the difficulties in obtaining capital for investing in courseware, are further barriers to the use of NMLM for many companies. Potential clients may also be hesitant due to a lack of awareness of the benefits of multimedia training. Raising awareness of the benefits of new media based training both with trainers and learners will be crucial in fully exploiting the possibilities offered by the technology.

4.5.7 Foreign Competition

Increasingly, U.S. suppliers are delivering their products and services in Canada, through either establishing offices, buying out local firms or investing in joint ventures. This is particularly evident in the area of technology based training, as rapid changes in technology facilitate delivery of education and training services. For example, as training authoring systems are becoming more widely available, and because entry costs to the