

3. INTRODUCTION

The education and training services (ETS) industry consists of establishments and organisations engaged in the delivery of education and training services mainly on a fee or contract basis for profit. These services include the commercial activities of public institutions and community based organisations, which often operate on a cost recovery basis. There are four general components within the industry :

Firms specialising in education and training programs and their accompanying products and services such as courseware, curriculum design, train the trainer programs and training needs assessments businesses in other industrial sectors (for example, accounting, engineering, management consulting and telecommunications) that provide education and training services either as a supplement to their main product or service line or on a stand-alone basis private schools and training institutions commercial activities of public education institutions such as colleges, universities and "Collèges d'enseignement général et professionnel" or "CEGEPS" (as opposed to the degree and diploma granting activities of the public education sector, which are beyond the scope of this document).

The industry focuses its efforts on providing job-related training and skills upgrading, such as management and executive development, as well as language training and computer and professional technical training. Trainees include predominantly management, professional and technical staff and some clerical and office workers.

Statistical data are lacking on the Canadian education and training services industry on both the supply and demand sides. Unlike most other service industries, the ETS industry does not benefit from an annual statistical survey, and collection of other data is very limited. While statistical data cover educational services at the aggregate level and numbers may point to certain trends, it is never clear whether these apply across-the-board to all types of educational providers including private sector firms. For example, Statistics Canada data show that the educational services industry — defined by Statistics Canada to include primary, secondary, university and non-university education — provided jobs to almost 930 000 people in 1996, with a total payroll of more than \$34 billion. But because the lion's share of educational services is held by the public education system and because Statistics Canada in its reporting of data does not