

The Canadian Language Training Industry Technology Roadmap (2003–2007)



Industry
Canada

Industrie
Canada



National Research
Council Canada

Conseil national
de recherches Canada

ALL RIGHTS RESERVED.

No part of this document may be distributed, reproduced, recorded, photocopied, entered into a spreadsheet or information storage and/or retrieval system of any kind by any means, electronic, mechanical or otherwise without the expressed written permission of AILIA Inc.

Copyright © 2004 AILIA Inc.

Introduction

In recent years, a series of related measures have been taken to stimulate the Canadian language industry. One such measure was the establishment of a Technology Roadmap (TRM), an undertaking intended to identify future directions for industry-specific technology development, support and integration in four language industry subsectors: translation, speech processing, content management and language training. This document summarizes the first phase report of the language training subsector, defining the current state of the industry and Canada's potential positioning within this market.

Members of the TRM Committee come from industry, government and educational institutions across Canada. Their work is supported through Industry Canada and the National Research Council Canada along with the recently formed Association de l'industrie de la langue/Language Industry Association (AILIA) whose role is to unite and strengthen Canada's dynamic language industry nationally and abroad.

The Technology Roadmap (TRM) Process

- Establish statements on the purpose and goals of the TRM (2003 – 2004);
- Define the scope, including key technologies and research, of the language training industry TRM (2003 – 2004);
- Specify language training technology market drivers and their targets (2003 – 2004)
- Define the needs of the Canadian language training industry and its customers (2004 – 2005);
- Recommend to AILIA language training technology research and development support strategies (2004 – 2005);
- Define the specific skills and knowledge required by the industry's future work force to develop and implement the new technologies (2004 – 2005);
- Implement AILIA's language training technology research and development support strategies (2004 – 2007);
- Promote skill and knowledge development of Canada's future work force through business incentives and academic financial support (2004 – 2007).

Language Training Overview

Canada's Language Training Industry represents economic activity in a range of public and private sectors that include English as a second language (ESL), French as a second language (FSL), international language training, language assessment and related services¹, industry-specific language skills upgrading (in healthcare and engineering for example) as well as TESL (Teaching English as a second language) and French second language teacher training and certification.

¹ Related sectors include tourism and accommodation services for the more than 100,000 foreign students visiting Canada annually for language training services, see: http://www.capls.com/english/media/pdf/ailia_nov_03.pdf

Associations including The Canadian Association of Private Language Schools (CAPLS) and the Canada Language Council (CLC) have been formed to unite what had been a fragmented market, to unify the private language school industry (CAPLS) and to represent and market both public and private language training institutions (CLC). The CLC has developed a Quality Assurance Scheme in an effort to unite and market training programs offered by its approximate 77 members. The approximate 72 CAPLS member schools enroll over 60,000 students annually, employ about 2000 teachers and staff, and generate up to \$500 million in economic benefits every year².

Canada’s private language schools and educational institutions are working to strengthen marketing efforts to increase their market share from the approximate 12.5% of the English language training global market acquired by Canada in 2002, both in terms of student numbers and revenue. This market has been estimated at almost US\$ 1 billion³.

The Canadian language training sector includes the following markets and related training services⁴:

Sectors/Markets <i>Market size/revenue when available</i>	Training and Training-related Services
K – 12 students in provincially funded schools <i>Approx. \$3,000,000</i>	<ul style="list-style-type: none"> ▪ Second language (ESL & FSL) training ▪ French language immersion programs ▪ International language programs
International students <i>> 100,000 annually⁵</i>	<ul style="list-style-type: none"> ▪ ESL/FSL training & assessment ▪ Accommodation/tourism-related services
Corporate language training <i>Approx. \$170 million</i>	<ul style="list-style-type: none"> ▪ Second and foreign language training ▪ Language assessment ▪ Intercultural communication and relocation
New immigrants	<ul style="list-style-type: none"> ▪ Federally-funded LINC (Language Instruction for Newcomers to Canada) ▪ Industry-specific language skills upgrading
TESL - teacher training	<ul style="list-style-type: none"> ▪ Certificate and non-certificate teacher training and career placement services
Consumer language training	<ul style="list-style-type: none"> ▪ Self-study and distance education programs ▪ Consumer language training

Issues Facing Canada’s Language Training Industry

- Multi-sectored market and fragmented national industry;
- Increased global competition for the lucrative international student market - English/French language immersion programs;

² www.capls.com

³ CAPLS 2003 Policy Position Paper, www.capls.com

⁴ Language Training Subsector Stage 2 Report: Current State of the Language Training Industry Market, prepared by Tassos Theodoridis in 2004 for AILIA, Language Technology Roadmap

⁵ CEC (Canadian Education Centre Network) indicated that 106,000 international students contributed 3.5 billion annually to the Canadian economy in 1999 – 2000

- Increasing demand for training program standards/benchmarks and quality assurance;
- Constrained government use of the Canadian language benchmarks and the CLBPT (Canadian Language Benchmarks Placement Test), a complete English/French language proficiency measurement tool/assessment, comparable to the internationally recognized ACTFL (American Council for the Teaching of Foreign Languages) Proficiency Guidelines;
- Industry reluctance to accept and actively integrate language training technology.

Language Training Technology

Language training technology has been relatively slow to be developed and integrated into Canadian language training programs. There is general unawareness about the power of such technology in language training and a lack of vision of how best to integrate technological tools into language training delivery.

Questions remain whether technology can provide a complete language training solution through distance education; is it best used to complement a classroom-based approach (blended learning) or can technological tools feed enrolments and generate peripheral revenue/learning in face-to-face programs? Language teachers appreciate the relevance of technological approaches with students but often lack access to computers/technology, training in computer-assisted language learning (CALL) and training in how best to integrate technological tools into training programs and specific curriculum.

Educational institutions often have limited technological resources and are wary of investing money into the necessary infrastructure until they see the potential return on learning and revenue. Many e-learning programs and protocols follow linear learning/training design approaches, not the cyclical, adaptive and interactive approaches necessary for the unique pedagogy of language teaching/learning. Much existing language training software programs adopt a drill/practice approach, useful for developing grammatical accuracy but have limited potential in developing fluency and spontaneous communication skills. Communicative technology-based language training programs involving simulations, adaptive and contextualized learning from competitive markets in Europe, the US and Australia are beginning to appear, leaving Canada's language training industry behind. Technology used to deliver and complement language training programs include:

Low Technology:

- Pronunciation/listening audio/video cassettes and CDs often integrated with text-based materials
- Email, LISTSERVs, Web-based conferencing tools

High Technology:

- Online, interactive dictionaries, glossaries, concordances (vocabulary acquisition tools)
- Interactive, multimedia software and simulations
- Streamed audio and video
- Voice recognition software
- Audio, video & text chat, conferencing/messaging
- E-learning
- Web course management systems & distance education
- Virtual reality, simulation software & MOOs (Multiple Object-oriented systems)

Technology has the potential to streamline, individualize, maximize and increase the scalability and profitability of language training programs. Multimedia and the interactive capabilities of computer mediums offer language learners individualized, instant feedback, language assessment, engaging target language practice and opportunities to interact with learners and first language speakers in unlimited locations.

E-learning and Web-based course management systems have the potential to provide flexible, adaptive and cost-effective language training solutions to all industry sectors. Online learning is predicted to be the fastest growing method for delivering education and training to all educational sectors, representing a U.S. market of \$740 billion.⁶ Fueling this growth is the cost-efficiency in delivering training through technological mediums.⁷ Technology-based training has the potential to dramatically expand markets and increase market penetration for Canadian language training organizations.

The Canadian language training industry is exceptionally well positioned to assume global leadership in technology-enhanced language training. With exceptional teaching and instructional design resources, technological superiority in its infrastructure (connectivity, high quality networks)⁸, and recognized status as a multicultural society and global leader in language immersion training/research, the Canadian language training industry has a natural competitive advantage in the global marketplace.

Despite these advantages, however, Canada has lagged behind its global competitors in integrating technology into language training programs. To date, classroom-based training dominates the Canadian language industry in all sectors, complemented at times by low technology such as CD and audio/video cassette support. CALL (Computer-assisted language learning) approaches remain largely limited to language learning software programs, offered in computer laboratories, where the benefits of technology are constrained and integration remains disconnected from the curriculum and the learning environment.

Blended or mixed delivery systems integrating both face-to-face and technology-based learning have the immediate potential to increase market penetration and leverage the pedagogical benefits of technology with relatively little adjustment from current training delivery methods. A survey from the Canadian Society for Training and Development (CSTD) among 107 small to mid-sized companies revealed that instructor-led classroom training was the primary delivery mode indicated by 80% of respondents with only 41% using multimedia resources to complement this training. This data reflects findings in the U.S. corporate training sector demonstrating that the high cost of technology and the need of training /retraining personnel is an issue that prohibits high investments in e-learning.

Factors that continue to constrain the uptake of language training technology include:

⁶ SunTrust Equitable, *U.S. Education & Knowledge Projected Market Size* (\$Billion) retrieved from the www at <http://www.leoalliance.com/industry.htm>, March 2004

⁷ Dow Chemical went from spending an average \$95 per student/per course on classroom training, to only \$11 per student/per course with the implementation of a Web-based system.

⁸ Pursuing Excellence Through Connectedness: The Conference Board of Canada. June 2002 briefing by Natalie Gagnon, Goshu Adane Gebremichael and Brian Gurthie

- Fragmentation of Canada’s language training industry into numerous sectors and consequent lack of coordinated economic and industry support;
- Lack of industry and government vision, coordination (between federal and provincial jurisdictions) and targeted support defining the integration of language training technology into the Canadian language training industry;
- Lack of research on the benefits and options of language training technology integration and consequent industry/market unfamiliarity with these benefits/options;
- Lack of adequate language teacher training and support to use/integrate technology into language training;
- Lack of in-house expertise within educational institutions to develop/integrate language training technology;
- Lack of successful models of language training technology integration;
- Lack of instructional design, accreditation bodies to define, measure and enforce standards in language training technology that can be marketed internationally to increase Canada’s competitive advantage.

Recent efforts by AILIA and the newly established Language Technology Research Centre represent a positive step to address these constraints and facilitate development of this promising industry, affording Canada the same type of industry support granted to competitors in the United States, Europe and Australia.

In today’s global marketplace where economic activity is increasingly based on the development and exchange of information and knowledge, the need to communicate multilingually and cross-culturally is crucial for the industry to sustain its competitive advantage. Canada has the potential to position itself as a global leader in second and foreign language education given the necessary support and industry development.

Some Canadian organizations involved in research/development and delivery of language training technology:

- | | |
|---|--|
| <ul style="list-style-type: none"> ▪ Alberta Distance Learning Center (ADLC) ▪ Athabasca University ▪ Berlitz Canada Inc. ▪ Cedar–Works Software French ▪ The Centre for Language Training & Assessment Online (CLTA Online) ▪ The Canadian Language & Literacy Research Network ▪ Desire2Learn ▪ Gandy Associates ▪ Image Media ▪ Ingenuity Works ▪ Intellectum Plus Inc. | <ul style="list-style-type: none"> ▪ NAS Software Inc. ▪ The Ontario Institute for Studies in Education of the University of Toronto (OISE/UT) ▪ Open Learning Agency of British Columbia ▪ SpringHills International Education Group ▪ Strategic Transitions Inc. ▪ Stream Canada ▪ Télé-université du Québec ▪ Vital Knowledge Software ▪ WebCT ▪ Workplace Training and Services Inc. |
|---|--|

Please note that this list is only the beginning. Please notify AILIA at communication@ailia.ca to add your organization to this list.

Benefits of Joining AILIA for Language Training Organizations and Professionals

Individuals and organizations active in the language training sector are invited to join AILIA. In addition to the general advantages resulting from membership of an association of language specialists, members may:

- Receive a monthly market intelligence newsletter;
- Obtain news of trade missions, market studies and other information relevant to the language training industry;
- Inform other members of their products/services;
- Play a part in formulating and influencing strategy and policy for Canada's language training industry;
- Participate in commercial and business development activities;
- Acquire business contacts through AILIA's Web site and networking venues.

Various classes of membership exist; information can be found at the AILIA Web site: www.ailia.com