



# Education Canada Brand Argument Paper

*Languages Canada Inclusion*

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Submitted by: Languages Canada Advocacy and Affiliations Committee

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## **EXECUTIVE SUMMARY**

The association was officially launched in March of 2008 to represent institutions from the **public** and **private** sectors offering French and English language training and was created through the amalgamation of the Canadian Association of Private Language Schools (CAPLS) and the Canada Language Council (CLC). Its mandate is to ensure that language training in Canada is of the highest quality and properly represents the excellent reputation Canada has within the world market for education and language instruction.

A first priority for Languages Canada has been to develop a national approach which serves to coordinate the efforts of the private and public language training industry and government to build Canada's and its respective provinces' international language training sectors. A large share of Canada's language training industry has been developed from the entrepreneurial efforts of the private sector, which understands the competitive environment of the global education economy. According to the *Conference Board of Canada*, Canada's language training sector represents a **market share of 15%**. Canada's portion of a global business that is worth over \$6.5 billion a year makes up approximately **\$1.5 billion**.

Canada ranks **third** among destinations for English training. The UK and the US rank first and second respectively with Australia, Ireland, New Zealand gaining considerable ground due to their collective efforts between private and governmental sectors.

We have identified three key arguments for inclusion of all Languages Canada program members to the Edu-Canada Brand:

### **1: Quality Assurance Accreditation Scheme and Consumer Protection**

Languages Canada's role is to ensure that language training in Canada is of the highest quality when compared to competing nations worldwide.

### **2: A Stronger Brand with Languages Canada**

The Edu-Canada Brand would be much weaker without the LC accredited Language Programs. Languages Canada members spend tens of millions of dollars annually promoting Canada internationally and their programs are already well established with and trusted by the international agent community.

### **3: Languages Canada Membership is a large and critical sector in International Education**

Languages Canada is the only Canadian association representing both public and privately operated programs with over 144 French and English accredited language member programs.

Languages Canada members collectively have annual marketing budgets totalling a minimum of **\$87 Million dollars**. This figure would represent the cost of excluding Languages Canada from participation in the Canadian education brand and this would result in a much weaker brand and representation. **The inclusion of Languages Canada and all its members would raise the profile, quality and integrity of the brand and would truly be representative of all educational options for international students in Canada.**

## **BACKGROUND INFORMATION**

Languages Canada ensures that language training in Canada is of the highest quality. The association was officially launched in March of 2008 to represent **public** and **private** sector French and English language training programs and was created through the merger of the Canadian Association of Private Language Schools (CAPLS) and the Canada Language Council (CLC).

Key players from both public and private language training programs joined forces to create Languages Canada with the goal of guaranteeing the highest quality language education for international students and of providing a single bilingual voice for all accredited members. The Languages Canada Quality Assurance Scheme and Standards guarantee that international students who come to Canada to learn English or French can expect to receive a uniform level of first-rate instruction in a well-run facility, whether at a university or college language institute or at a private language school. Languages Canada's insistence on quality and excellence ensures that language programs interested in joining must meet globally recognized stringent quality standards specific for this sector.

Languages Canada was founded with a purpose, a mission and a vision and represents **144 member programs** (130 English – 12 French) from coast to coast.

### **PURPOSE:**

To be the voice of the Canadian language training sector

### **MISSION:**

To promote quality, accredited English and French language training in Canada, both nationally and internationally.

### **VISION:**

To be internationally recognized as the symbol of excellence, representing Canada as the number one destination for quality English and French language training.

## **STATISTICAL INFORMATION**

### **National Statistics:**

Languages Canada surveyed its national membership and can state that Languages Canada accredited programs trained **123,904 students** in 2007. This number represents **1,330,939 student weeks** and in our estimation, including tuition fees, accommodations, spending on meals, retail and activities, would represent a minimum contribution of **\$1,004,858,945** to Canada's economy by Languages Canada member programs alone. In addition, there is the added contribution to the Canadian economy when it is taken into account that many of these students, recruited by Languages Canada members, will continue on into the Canadian post-secondary stream. Nor do these figures do not include the millions of dollars Language Canada schools and institutions spend annually promoting Canada internationally. It is because of their investment that Canada continually ranks in the top three destinations for language training.

## **CANADIAN LANGUAGE TRAINING SECTOR**

According to UNESCO data, close to two million higher education students are being educated outside their home countries with projections further suggesting that this number may double by 2015 and double again by 2025 and this still rings true in these difficult economic times. This trend will have a direct effect on the language training sector as demand for language training services will grow as pressure for knowledge workers increases throughout the world. Therefore, with growing demand comes growing competition and the competition is working aggressively to increase its market share.

Many of these countries have developed national accreditation schemes. To put it into perspective, the UK, our largest competitor, is well ahead of Canada due to their nationally coordinated effort and significant government support. The same is true of Australia, where the language training sector receives substantial government support in terms of dollars for international marketing efforts and visa and immigration programs that are aligned with the nations marketing goals. New destinations, such as New Zealand, South Africa, Ireland, and Malta, are all competing with Canada’s share of this lucrative market. Whether Canada can remain in the top five nations depends on how well we build our education export economy over the next five to 10 years. This will be a huge challenge because we are the least coordinated and least focused among these nations in presenting our brand to the world.

According to the *Conference Board of Canada*, Canada ranks **third** among destinations for English language training following the UK and the US. The language training sector within Canada represents a **\$1.5 billion** industry with a world **market share of 15%**. Globally the language training sector is worth more than \$6.5 billion a year. While Canada ranks among the leading nations of the world, its position is not guaranteed.

With more than **40 years** of expertise and know-how in language training, the industry provides direct employment for approximately **14,000 Canadians** embodying a collective pool of talent made up of the finest technical tools, human resources and understanding of pedagogy, for French and English language training programs in the world.

Over the years, many studies and surveys developed and published by CAPLS, CECN (Canadian Education Centres Network), Language Travel Magazine and Languages Canada state the following perceptions that international students have about studying in Canada:

PERCEPTIONS	FACTS AND STATEMENTS
<ul style="list-style-type: none"> <li>• Good value for money</li> <li>• Quality, affordable education system</li> </ul>	<ul style="list-style-type: none"> <li>• Canada’s GNP investment in education is one of the highest in the World</li> <li>• Canada’s literacy rate exceeds many advanced countries</li> </ul>
<ul style="list-style-type: none"> <li>• Safe, healthy living</li> <li>• Multicultural society</li> </ul>	<ul style="list-style-type: none"> <li>• Canada’s educated multicultural communities beneficial to foreign students as they score high in knowledge-based literacy</li> </ul>
<ul style="list-style-type: none"> <li>• Good choice of study options</li> </ul>	<ul style="list-style-type: none"> <li>• Canada’s provinces offer a diverse range of advanced study programs</li> <li>• Our governments are strongly committed to the educating people in high value jobs</li> </ul>
<ul style="list-style-type: none"> <li>• Good place to start or enhance career</li> </ul>	<ul style="list-style-type: none"> <li>• Build global economy connections: Canada is linked to USA, Europe and Asia</li> <li>• An innovative society: pathways from Language Training to other education opportunities (i.e.: post-secondary) are available</li> </ul>

Canada has a unique advantage that no other country can claim: **two official languages**. An association of high quality French and English schools, Languages Canada members are represented in all Canadian provinces. The education export industry not only generates very significant revenue for Canada, it also brings invaluable benefits to Canada’s knowledge industry, enhances our human resources and skills training activities, supports sound immigration policy and is a catalyst in generating tourism dollars. It is of vital importance that Canada capitalizes on these benefits and continues to strengthen its reputation in the global language training industry through a collaborative branding of Canadian language training and education upon the world stage.

## **AFFILIATION WITH EDU-CANADA**

By coordinating the effort of the private and public language training industry and the government, the development of a national approach to strengthen Canada as a strong international education sector is vital and is the highest priority for the industry in both the private and public sectors.

Since 2004, many requests and discussion papers were developed by the Canadian Association of Private Language Schools (CAPLS) communicating the importance of developing a national framework/brand for the education industry.

### **CAPLS "TAKING OUR BRAND INTO THE WORLD" EDUCATION CANADA DISCUSSION PAPER AND CALL TO ACTION – APRIL 2005**

*"This discussion paper is an appeal to Canada's education export industry and government agencies. It is a call to stakeholders across the education export industry to come together to form an Education Canada Working Group and to work with **federal and provincial government** agencies to establish a funded international marketing program that will develop and promote the Education Canada brand. --- The call to action invites **all stakeholders** within Canada's education export industry to participate with our associations and organizations in developing and presenting an Education Canada brand promotion proposal as an **intra-departmental, inter-governmental** omnibus proposal to federal Ministers of Industry Canada; Foreign Affairs; International Trade; Human Resources and Skills Development; Canadian Heritage, the Canadian Tourism Commission and Citizenship and Immigration Canada, together with **provincial Ministers of Education** by the fall of 2005."*

This paper was an example of the language training sector taking a leading role in inviting all stakeholders together with various levels of government to work together towards a common goal of attracting more international students to Canada. Despite efforts such as this, for the most part, the international education sector has been left to its own devices, with individual schools and public and private sector industry associations pursuing their own marketing initiatives. The results are not impressive enough and therefore the call to action was made in order to coordinate stakeholder efforts.

Following the presentation by CAPLS at the Spring 2005 NEMR (National Education Marketing Roundtable) of "Taking our Brand into the World, Education Canada Discussion paper and Call to Action", the message became very clear that a framework needed to be developed for the Education Canada Brand. The central concept for this framework was to demonstrate the ability of the education export industry to establish an Education Canada Working Group whose vision is to position Canada as a major presence in the international education area. The language training sector stated that there was a need to renew the leadership of the federal government in education marketing; coordinate across all government policy and stakeholder interests; and establish an outward face to export markets. A working group was formed to establish action items to be reviewed at the next NEMR meeting. The group met several times by conference call and a goal was set to work towards increasing our market share of education exports by 50% over the next five years.

### **The recommendations that were developed from this working group in order to support the main goal were:**

- Recommendation 1: Endorse Education Export as a working concept to support the Education Canada Brand Development and Assign NEMR Representatives to Develop an Education Canada Brand Concept Paper  
**Languages Canada participated (CAPLS/CLC)**
- Recommendation 2: Implement Market Research with Support from CMEC, HRSDC, Industry Canada, CIC, Canadian Heritage, Stats Canada, EDC, CTC, Provincial Ministries, working with AUCC, ACCC, CAPLS, CECN, CLC and others  
**Languages Canada participated (CAPLS/CLC)**

- Recommendation 3: Undertake 3 Sector-Specific Consultations with industry representatives. Undertake a 4<sup>th</sup> consultation Bringing Together Participants in the Knowledge-Based Economy, Education Exporters and Tourism Promotion Agencies  
**Languages Canada was kept informed (CAPLS/CLC)**
- Recommendation 4: Draft a full Education Canada Brand Program Budget and identify Funding Partners and their Contributions (In-Kind and In-Cash)  
**Languages Canada was consulted (CAPLS/CLC)**
- Recommendation 5: Establish the Education Canada Brand, to be fully endorsed and launched on web sites and in publications of NEMR members with sector-specific funding in place to launch the brand at agent fairs in 2007  
**Languages Canada was no longer included as other NEMR members and the Federal and Provincial governments (through CMEC) took over the process**

An "Education Canada Branding Action Plan" was presented by CAPLS at the November 2005 NEMR meeting where information was shared about the working group findings, suggestions raised for the brand development and a proposed 2006 action plan. In the said presentation and supportive document, one of the items in the action plan was:

*"NEMR will seek the support of provincial education authorities, associations, and language training institutions, through their representatives to participate in consultations focused on bringing language training educators into the Education Canada Brand. In this case CAPLS has already volunteered to host a policy consultation at its November 2005 AGM inviting the participation of associations and government agencies."*

Although the policy forum entitled "International Education – An Expanding Export Market" took place at the CAPLS Conference in November 2005, with representatives from DFAIT, Industry Canada, CEC Network, Vancouver Coast & Mountains Tourism Region as well as a number of CAPLS members who were identified as leaders in marketing participating, it was shortly after this time that DFAIT and CMEC took over the consultations on the brand development process. Stakeholders were kept informed of updates at the NEMR meetings between 2006 and 2008 but the language training sector was no longer involved in consultations.

- April 2007:** DFAIT and CMEC have worked closely through FPCCERIA to create, develop and manage the Education Brand
- May 2008:** Deputy Ministers of Education of all ten provinces approved the proposed Pan-Canadian Education Brand, with the understanding that the Brand shall be jointly managed by DFAIT and the CMEC Secretariat
- June 2008:** Minister of International Trade approved the Education Brand concept and the principle of joint governance of the Brand by DFAIT on behalf of the Federal government, and by CMEC, on behalf of the provinces
- Sept 2008:** Ministers of Education officially launched the Education Brand for Canada

In 2007, Languages Canada learned that not all NEMR members would have access to the Education Brand for Canada but more specifically that not all Languages Canada members would have access. One of the underlying principles of the Brand use policy stated that:

*"Education being a provincial jurisdiction, there is consensus between Federal and Provincial governments to limit the use of the Brand to institutions recognized by provincial governments in the first phase of the Brand's use."*

## **DFAIT'S Presentation:**

A presentation was made by DFAIT to Languages Canada members at its annual conference in February 2009. While presenting the principles of the Brand Use Policy a statement was made that:

*"The Education Brand for Canada is a **shared** Brand approach representing the delivery of educational services in Canada to prospective international students."*

This is not the case as education is under provincial jurisdiction and the provinces/territories, through CMEC, have the authority to decide which institutions and organizations will be able to use the Brand. Languages Canada members will only be considered to be included in Phase Three.

- Phase One - Government departments
- Phase Two - Institutions regulated by provincial and territorial governments
- Phase Three - Other institutions (including Languages Canada members)

## **Fragmentation of Association:**

Currently, the public sector language programs of Languages Canada will have access to the Education Brand for Canada through their parent post-secondary institutions; but, private sector members who are not governed by any provincial education or post-secondary education ministries will not. The disparity and fragmentation countermands the efforts of an association that has worked extremely diligently to defragment the language training sector and ensure that there is parity for all members. A clear mandate for the merger of CAPLS and CLC, with the implementation of a common, national accreditation scheme, was to demonstrate to all levels of government and competitor nations that the perceived question of language training quality in Canada had been addressed. A common accreditation scheme would address any quality assurance concerns of the government at both federal and provincial levels and establish the desired quality standards for the industry.

## **KEY ARGUMENTS FOR INCLUSION TO THE EDU-CANADA BRAND**

**Languages Canada** would like to highlight reasons for the inclusion of **ALL** Languages Canada members to the Education Brand for Canada.

### **1: Quality Assurance Accreditation Scheme and Consumer Protection**

**Fact: Languages Canada's role is to ensure that language training in Canada is of the highest quality.**

The LC Quality Assurance Accreditation Scheme was created in order to send a message to international students (and their agents) that language training programs accredited by Languages Canada are institutions that offer high quality French and English programs. Each individual language training program accredited by LC went through a rigorous evaluation process which examined the six areas which respond to specific international **standards: student services, teaching staff, curriculum, marketing and promotion, administration and student admissions**. Each LC accredited language training program also must abide by and reaffirm, on an annual basis, the Languages Canada **Code of Ethics** which includes regulations pertaining to: the association's rules and laws; accreditation, diversity and the **LC Program Closure Policy**.



Accreditation schemes are at the centre of all effective and coordinated national approaches to the international language training industry. Their value and significance for international language services are undeniable. These schemes provide important benefits to the industry groups that subscribe to them as:

- They set overarching standards that demonstrate a visible commitment to maintaining quality;
- They enhance the value of membership in participating industry associations;
- They give the industry added leverage in its international promotions, and
- They provide opportunities to improve services through evaluations, inspections and sharing of best practices.

Languages Canada ensures the highest quality of language training in Canada as:

- Quality Assurance is a critical element;
- All member schools are required to be accredited;
- The Accreditation Scheme operates at arm's length, is transparent and confidential;
- The Accreditation Scheme maintains the integrity and rigour of Languages Canada standards and process;
- All program reviews are done by a team of highly qualified independent professionals.

**Official national recognition of the Languages Canada accreditation scheme** was given by the Canadian Information Centre for International Credentials (CICIC), an agency of the Council of Ministers of Education of Canada; Canadian Heritage which maintain the Federal government's official lists of accredited language programs; and by the Department of Foreign Affairs and International Trade Canada, which now requires Languages Canada accreditation for participation in all Embassy-sponsored education promotion events overseas.

Another factor to highlight regarding the Languages Canada Quality Assurance Accreditation Scheme is that a comprehensive review of the scheme was conducted by George Tillman Consulting in February and March of 2008. This review was commissioned by the Federal-Provincial Consultative Committee on Education-Related International Activities (FPCERIA) and organized and funded by the Department of Foreign Affairs and International Trade Canada (DFAIT). The main reason for this review was to reassure FPCERIA that, in developing an Education Brand for Canada, the organizations that will be allowed to use the Brand are genuine, reputable educational institutions. The Committee contracted this study to determine whether the accreditation scheme of Languages Canada meets the standards of Quality Assurance that are mandated in education jurisdiction in Canada and abroad. The findings of the review were positive and are summarized below:

### **TILLMAN REPORT**

The core quality assurance principles and procedures of the LC scheme compare reasonably well to those described in the CMEC Canadian Degree Qualifications Framework, Procedures and Standards for new Degree Program Quality Assessment, and the Procedures and Standards for Assessing New Degree-Granting Institutions.

The LC accreditation scheme reflects reasonably well the standards and processes of even the most stringent provincial quality assurance regimes and qualifications frameworks.

Languages Canada has developed its scheme and standards following a review of CLC past practice, and the policies and practices of nine internationally recognized schemes in Canada, Australia, France, the United Kingdom and the United States.

The scheme is clearly defined and the procedures and standards are publicly available. Applicable LC principles: be a transparent process; demonstrate good value; maintain the integrity and rigour of standards and process; have an appeal process; have a provisional pass system (a remedy mechanism for minor issues); be timely and accurate; be managed in a professional, consistent and reliable manner.

Each program review is conducted by independent experts with experience in language studies and accreditation/evaluation.

In forming Languages Canada, its language programs have made the commitment to recognize the validity and the binding character of the process.

As a conclusion, the Tillman Report claims: *"It thus seems fair to say that the Languages Canada Accreditation Scheme, which is designed to be operated at arm's length from Languages Canada, is a sound "work in progress"."*

At the time of the Tillman review, in March of 2008, Languages Canada had just begun operation. One of the recommendations in the Tillman Report was that FPCERIA should review the operation of the LC accreditation scheme at the end of the organization's fiscal year in order to gauge the sustainability of the scheme. There have been some discussions with DFAIT to conduct a second phase review in the near future.

### **Consumer Protection - Program Closure Policy:**

Languages Canada is the **only** Canadian language training organization that has a Program Closure Policy in place that each member must adhere to and respect. In the unlikely closure of a Languages Canada Program, this policy is designed to affected students by offering alternative courses that are of an equal value, have similar content, and are in the same geographical area of Canada, to the affected student's original program.

In the past, language training programs have been more than willing to assist students. Fortunately, the reassignment of ESL students, in the event of a school closure, is perhaps easier than for those students attending private skills training institutions. ESL schools tend to locate in the larger cities such as Vancouver, Toronto and Montréal. There are usually many schools within fairly close proximity and the non-resident students are easier to relocate. Placement of these students is less complicated than those who may be attending a very specialized skills training program where there might only be one other provider of such training in the region, or even the province.

**Recent Program Closure Policy Implementation:** In the fall of 2008, Languages Canada carried the Program Closure Policy one step further when a situation occurred where globally, over 1000 students, and in Canada approximately 160 students were left on their own when the Gateway 21 Agency of Japan dropped their support to the said students. Some of these students had paid for their courses until August 2009 but the agency neglected to forward the fees to the language programs before declaring bankruptcy. The Languages Canada Program Closure Policy was implemented and thirteen members of the association offered free courses to students of the agency. We are proud to say that the Japanese Gateway 21 students in Canada were among the few of the agency's clients who received tuition support. No other country took such measures to ensure the students were looked after. Languages Canada received a great deal of positive feedback and is highly respected by the Canadian Embassy in Tokyo, the Japanese media, The Japanese Association of Overseas Studies (JAOS), the Federation of Education and Language Consulting Agents (FELCA) among others. Japan is consistently the first or second largest nation provider of language students to Canada and to BC in particular.

**\*The Languages Canada Standards and Specifications, Code of Ethics and Program Closure Policy are included in the annexes.**

## **2: A Stronger Brand with Languages Canada**

**Fact: Languages Canada is the only national association that can ensure high quality language programs compared to international competitors and is the voice of the Canadian language training sector.**

It is evident that this argument paper demonstrates strong factors to consider for the inclusion of **ALL** Languages Canada program members to the Education Canada Brand. To further emphasize these points, there are a few factors to consider if Languages Canada program members were **NOT** all included in the Brand:

- the Education Canada Brand would not be representative of all education opportunities offered in Canada and therefore would **lack legitimacy** by agents and those involved in the promotion of education in Canada;
- the brand would **lack the marketing expertise** of the private language schools, developed over the last 20 plus years, a sector of the industry which has accomplished so much without any government support;
- the brand would **lack the significant financial support** in terms of international marketing investment of private language schools;
- the brand would suffer in its credibility, support and recognition internationally as a symbol of quality assurance and consumer protection without LC endorsement;
- major competing nations with coordinated international marketing plans, including the United Kingdom and Australia, recognize the importance of the language training sector in their promotional brands. We must follow their lead to remain competitive and relevant.
- **all** members of Languages Canada adhere to a Code of Ethics which is not the case for those programs not accredited by Languages Canada;
- all Languages Canada program members are safe to work with bona fide students as they are **all** viable organizations;
- many non-credit language programs at universities are not accredited and may not provide an appropriate level of quality – this is **not** the case with Languages Canada program members;
- the language training sector and more specifically many Languages Canada program members offer seamless **pathways** to other education opportunities at the post-secondary level be that university or college and even to employment opportunities.

## **3: Languages Canada Membership is a large and critical sector in International Education**

**Fact: Languages Canada is the only Canadian association representing over 144 French and English language member programs from the public and private sectors.**

Our membership represents language programs from coast to coast and each member program must meet stringent quality assurance standards which ensure that students will receive excellent French or English language instruction and services in a well-run facility. Rigorous standards apply equally to all members – big or small, public or private. This means that students can be confident in their choice to study in Canada, since they will receive a quality experience, regardless of which member program they choose.

From national and international surveys conducted by the industry, the reasons foreign students choose Canada over other destinations are significant. A large percentage of students surveyed feel that Canada is a “safe country to study” which offers a “quality of life” that appeals to them because of its “beautiful nature”. Another very important factor is the “quality of program” that provides “value for money” which is what Languages Canada member programs offer to international students.

Another advantage is that many Languages Canada member programs (public and private, French and English) are affiliated or have agreements with some of the finest colleges and universities in Canada. This allows for a variety of educational pursuits ranging from informal language training to intensive research and post-graduate options. For this reason, students in Canadian language programs tend to be very well educated, with several years of post-secondary education, and/or professional employment experience from their country of origin, behind them. Students, by and large, appear to be the career-oriented, twenty-something population, who are looking to upgrade their language skills to enhance their advanced education or increase their employment opportunities. Recent changes to the post-graduate work permit program offer a further incentive for studying in Canada. Also, primarily during the summer months, many Languages Canada member programs cater to groups of children and teenagers from all over the world by offering summer language camps combined with activity programs. These young people often will return to Canada for future intensive language training and often post-secondary education.

Examples of types of programs offered by Languages Canada member programs coast to coast are:

- ESL / FSL Immersion programs;
- ESL or FSL for Academic Purpose;
- ESL or FSL for Specific Purpose;
- Executive / Corporate Training;
- Internship Programs; and
- Winter or Summer Activity / Camp Programs.

**A comprehensive listing of Languages Canada members and their various language programs can be found at [www.languagescanada.ca](http://www.languagescanada.ca)**

## **LANGUAGES CANADA'S ACCOMPLISHMENTS**

In its first year, Languages Canada successfully blended the cultures of the two previous organizations (CLC – CAPLS). These accomplishments were achieved through the dedication and efforts of staff and member volunteers through the activities of six internal committees: Advocacy and Affiliations, Finance, Membership and Communications, Marketing and Promotion, Quality Assurance and AGM/Conference and Professional Development.

Just to highlight a few of the association's early accomplishments:

- Full review of the Languages Canada Standards and Specifications as well as the Terms of Reference for the Quality Assurance Scheme;
- Development of an Immigration Position Paper presented at ACISI in May of 2009 and to CIC bureaucrats;
- Letter writing campaign for the inclusion of all LC program members in the Education Canada Brand (letters sent to FPCCERIA, CMEC members and Deputy and Assistant Deputy Ministers);
- Relationship building with government departments and agencies (CIC, DFAIT, Canadian Heritage, ACISI, NEMR, CMEC, Manitoba International Education Branch, BC Ministry of Advanced Education, etc.);
- Relationship building with other associations and organizations (CECN, GAELA, FELCA, ALPHE, AILIA, AUCC, NACC, CETAC, ACCC, BCCCA, BCCIE, CFIB, ICEF, CASLT, etc.);
- Development of a 5 year international marketing plan (Languages Canada visibility at a national and international levels including ICEF Berlin, GAELA, ALPHE, BMI etc.)
- Redesign of Languages Canada website and translation of basic information into eleven languages;
- Development of promotional material for Languages Canada members to help promote the association through their individual marketing efforts and trade show participation;
- Organization of its first annual AGM/Conference offering Languages Canada program members a chance to provide input into the future direction for the association and to attend professional development sessions

## **CONCLUSION**

With the reputation and quality of Canadian education at stake and with a mandate to be representative of all education opportunities offered in Canada and therefore **legitimately** promote education in Canada, **all** Languages Canada program members need to be included in the Education Canada Brand.

When comparing the Canadian language industry to many of our major competitors such as Australia and the UK, it is very evident that Canada is not experiencing the same level of growth in our international student numbers. Through research and in discussions with Study in Australia and Education UK organizations, all levels of government (federal, provincial and civic) need to consider the importance of the language training industry. In both Australia and the UK, they have included the language industry within their Education Brand. More specifically, Study in Australia gives a definition of Study in Australia brand that:

*"Australian education has a strong international reputation for excellence. Whether you study at a university, school, vocational or **English language institute**, you will receive a quality education that will form a strong foundation for your future success (this is the definition used in the brand tag line under the learn promotion: Study in Australia – Live. Learn. Grow.)."*

The Education UK website also includes lists of educational options for international students including independent schools, career based & pre-university options, undergraduate and post-graduate options as well as a list of all **accredited language institutes**:

*"The UK is a world leader in English language teaching. Over 600,000 people every year come to the UK to learn the language in its natural home. Why not join them? Here you'll find the most comprehensive listing of **accredited English Language courses** in the UK. To find a course, please use the English language search box to the right side of this page. Below, you'll find links to useful information about studying English in the UK."*

### **The Cost of Exclusion - \$87M**

Languages Canada members collectively have annual marketing budgets totalling a minimum of **\$87 Million dollars**. This figure would represent the estimated cost of excluding Languages Canada from participation in the Canadian education brand and this would result in a much weaker brand and promotion abroad.

LC surveyed its membership to determine the current marketing contribution it makes to the promotion of Canada as the world's destination of choice for international education. With only 75% of its membership reporting, the Association was able to quantify the following contribution in terms of marketing activities:

• <b>marketing staff employed in Canada</b>	<b>305</b>
• <b>marketing staff employed abroad</b>	<b>321</b>
• <b>marketing activity expenditures</b>	<b>\$13M</b>
• <b>marketing staff payroll</b>	<b>\$14M</b>
• <b>agent commissions paid on enrolment</b>	<b>\$60M</b>
<b>Total</b>	<b>\$87M</b>

By definition, the Edu-Canada Brand could not meet its objectives of promoting Canada as the world's international education destination by excluding a minimum of **626 employees and an annual budget of \$87M**. A standard SWOT analysis would conclude that the threat of excluding such a significant sector would cripple the Brand.

**Languages Canada, representing accredited French and English language training programs requests that ALL Languages Canada program members be included in the Education Canada Brand. The inclusion of Languages Canada member programs would serve to raise the quality of the Brand, its market awareness and international recognition and legitimacy as the symbol of quality in Canada. This would then be truly representative of quality educational options available to international students in Canada.**