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The Language Training Market In Hong Kong and Macau

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THE LANGUAGE TRAINING MARKET IN HONG KONG AND MACAU

EXECUTIVE SUMMARY

Hong Kong

The government of Hong Kong intends its citizens to be bi-literate (Chinese and English) and tri-lingual (Guangdonghua,¹ Putonghua and English) within the next generation. To this end, it has evaluated the language strengths of its people, developed a strategy for improvement, provided legislation to effect systemic change and allocated funds to ensure change takes place. It has set goals, created benchmarks, developed implementation strategies, a mechanism for continuous monitoring and passed a legislative framework to ensure success. Although the issue is one of education, the business and labour sectors are working alongside communities in Hong Kong to effect change.

Supported by the government's Language Fund and driven by the recommendations of the Standing Committee on Language and Research (SCOLAR), a culture of language acquisition is developing in Hong Kong. Six major funding schemes totaling \$2.44 billion² are in place which will involve the participation of a significant cross section of the community.

The Hong Kong government welcomes the services and expertise of non-local providers (the government's term for foreign language training providers) to help Hong Kong achieve its goals. "Invest Hong Kong" is a government department created specifically to assist overseas enterprises in establishing a local presence.

Within the Asian language market as a whole, the trend is towards transnational education. In this paradigm, foreign service providers set up local offices to supply language training programs, often using non-traditional approaches. Australia, the United Kingdom and New Zealand are market leaders in this regard. In this way, Asian countries are keeping more of their currency at home while still taking advantage of the latest language training developments available on the market.

Indeed, Hong Kong aims to create 28 500 post-secondary places by 2010 in an effort to keep its students at home. To this end, the government is offering financial incentives to entice non-local providers to create more local programs, either full- or part-time.

¹ The Chinese language features many dialects and two different written scripts. In Hong Kong and Macau, people speak Cantonese (Guangdonghua in Chinese) and write using traditional script. In China, the official Chinese is Mandarin (Putonghua, in Chinese) and the written script is a simplified form developed after Mao Tse Tung became Chairman. Suppliers of language training services coming to Hong Kong will be considered respectful if they use the term used by Hong Kong's citizens. Throughout this document, Guangdonghua and Putonghua will be used.

² All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. The conversion to Canadian dollars is based on Bank of Canada rates.

Approximately 74 100 local students under the age of 25 study overseas, with Canada receiving the highest percentage. Hong Kong youth studying in Canada add \$500 million to the Canadian economy. In the future, however, the government of Hong Kong expects more students seeking a Canadian education to use the services of a local Canadian provider. To keep its market share, Canada faces a significant challenge from Australia, which is already entrenched in the local market. Canadian suppliers must therefore develop strategies for retaining existing market share while exploring other market segments.

To be successful in this market, Canadian suppliers should also understand that Hong Kong is the gateway to mainland China. Hong Kong (June 2003) and Macau (October 2003) have signed Closer Economic Partnership Agreements (CEPA) with the Chinese Mainland³; furthermore, China's Guangdong Province is expanding links with the regions of the Pearl River Delta (PRD).

The upcoming Pan-Pearl River Delta (Pan PRD) Regional Cooperation and Development Forum is a voluntary regional development strategy creating a common market encompassing 460 million people. More than 7500 overseas companies have offices in the Pan PRD, of which 3800 are in Hong Kong. Future free trade agreements could open up southern China to the world, which would require business to be conducted in English. Those considering this market should position themselves now to take advantage of future opportunities.

Macau

With respect to the language training market, Macau is largely untapped territory i.e. language suppliers seldom come to Macau, residents must travel to Hong Kong to obtain support and there is little competition. Canada is among the few countries trying to establish a local presence. At present, the \$2.5-million "study abroad" program represents the largest share of the language market. Because Macau is mostly dependent on Hong Kong for services, it can be considered a secondary market.

Forces driving the English language market in Macau include the recent opening up of the gaming and tourism industries, which has led to a boom in casino construction. The number of expatriate workers in the country is growing and the gaming industry wants its workforce to be English-speaking. English is the third language spoken by the Macanese. There is little government funding for English language training.

Nevertheless, academia is responding to the need for foreign language training, while the local government is planning a review and needs analysis of the education sector which could have a major impact on the local English language market.

With lower business costs, Macau could well evolve into another gateway to China.

³ More information on these CEPAs can be found at the following addresses: Honk Kong-Mainland China: <http://www.tid.gov.hk/english/cepa/index.html>. Macau-Mainland China: http://www.economia.gov.mo/page/cepa_c.htm

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THE LANGUAGE TRAINING MARKET IN HONG KONG AND MACAU



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MARKET OVERVIEW—HONG KONG

Background

Hong Kong has grown into one of the world's most densely populated areas, with some 6250 people per square kilometre. In 2004, the population of Hong Kong reached 6.9 million.

Although 98% of the people are ethnic Chinese, Hong Kong has a substantial expatriate community. Before the British handover, many residents had already emigrated to Canada, Britain, Australia, New Zealand and the United States. Former residents have gradually been returning as “dual citizens”, which has made it difficult to determine the precise number of expatriates. According to the Consulate General of Canada in Hong Kong, an estimated 250 000 Canadian passport holders reside in Hong Kong.

English was the official language until 1976, when Guangdonghua was formally granted official status. Guangdonghua is spoken by most people, but English is widely understood. Written Chinese follows the traditional script which has been passed down through each generation. In mainland China, Putonghua is spoken, and a simplified Chinese script is used in written text. English is spoken fluently by more than one-third of the population.

Hong Kong considers itself mainland China's “window to the West” and the major financial hub in Southeast Asia. To maintain this competitive advantage, the government is expecting the next generation of Hong Kong's citizens to be tri-lingual (Guangdonghua, Putonghua and English) and bi-literate (Chinese and English).

Education System

The Education and Manpower Bureau (EMB) acts in the same capacity as a Canadian provincial education ministry and as such is responsible for all aspects of education, including post secondary, and for implementing all of the government's education reforms, including language policy. The Education Commission (EC) advises both the EMB and the Hong Kong government about education at the community level.

In general, schools in Hong Kong fall into one of two categories: local or international.

Local Schools

Local schools are operated using the British public education model which requires children between the ages of 6 and 15 to attend full-time. Most children usually start school at age three when they enter a three-year, pre-school kindergarten program. While government legislation governs their establishment and minimum standard of operation, kindergartens are considered private schools.

Local schools fall into three main categories—government, aided, and direct subsidy—according to the type of funding they receive and the sponsoring body. These three types of schools comprise 90% of all schools in Hong Kong.

In September 2004, 397 500 children were enrolled in government and aided primary schools and 414 300 in secondary schools. There are few government schools and the government is fully responsible for them. Aided schools have historically been created and managed by religious, charitable, philanthropic, labour and other sponsoring bodies. Aided schools are now fully funded and fall within the jurisdiction of Hong Kong's education policy. Management of these schools is left to the sponsoring body that created them.

As a group, Filipino nannies are important English language providers in Hong Kong. Many parents employ nannies as caregivers for their children and typically the decision to hire is based on the English proficiency of the nanny. Over 300 000 nannies are recruited from the Philippines each year largely because of that country's high English language standards and the willingness of Filipinos to work abroad.

While nannies are expected to communicate in English and provide an English model for the children in their care, a large number of nurseries and kindergartens have been established advertising an English language environment to complement the English being learned in the home.

Students start learning English formally in kindergarten, an increasing number of which are using English as a medium of instruction. Parents wishing to educate their child in English often try to save a place in an English-language kindergarten as soon as the child is born. (Canadian International School once received an application for kindergarten accompanied by an ultra-sound image.) There are currently 737 such kindergartens in Hong Kong. The leading Canadian pre-school - kindergarten is THINK International School/Kindergarten.

Children start formal primary school at age six. After passing through primary levels one to six, which is equivalent to grades one to six in Canada, students attend seven years of secondary school, forms one to seven, which is the equivalent of grades seven to thirteen in Canada. There are 759 primary schools, of which 47 are international and 519 secondary schools, of which 23 are international. While most local schools are separated into kindergarten, primary and secondary facilities, 26 are considered "through train" schools with primary and secondary students in the same school. In Hong Kong, there are 55 International Schools. (Primary and secondary classes held in separate buildings are counted separately, which inflates the numbers.)

Expatriate (e.g. returning Chinese) children or those who have been educated in a language other than Chinese are finding it very difficult to enter the local system because few schools are equipped to accept them. Hong Kong is also facing another challenge as students newly arrived from mainland China often speak and write a different form of Chinese than is used in Hong Kong. The Education and Manpower Bureau (EMB) continues to create additional spaces for returning Chinese, non-Chinese and newly arrived students from the mainland.

A Secondary School Places Allocation System, which applies to students attending local schools, determines the group of secondary schools to which these primary students will be admitted. Secondary schools are streamed into "bands" with band one being for the brightest students and band three being for those whose ability, behaviour and work ethic are in need of greater support.

After completing form three (equivalent to grade nine in Canada) secondary students can either choose to enter a sciences or humanities stream. After completing form five (grade eleven in Canada), students take the Hong Kong Certificate of Education Examinations (HKCEE). The HKCEE is conducted in May and the results are released in the second week of August. Apart from the Chinese and English languages sections of the examination which are taken by most candidates, and other language-related subjects, all subjects may be written in either Chinese or English. The same standards are applied in marking and grading; the language medium is not recorded on the results notices or certificates.

There are currently two syllabi offered to students who will eventually be taking the HKCEE English language examination: Syllabus A and Syllabus B. Syllabus A is the less advanced; Syllabus B is equivalent to the British O-Level. A grade "C" or above in most of the HKCEE subjects is recognized as equivalent to an O-level pass (grade "C" or better) in an overseas GCE examination. Grade "E" is widely accepted in Hong Kong as a basic level of achievement for employment purposes.

Fifty-five percent of Hong Kong's form five cohort do not proceed to form six. Historically, only 18% of the students writing the HKCEE enroll in tertiary education, although this proportion increased to 22% in 2005. Acceptance by a foreign school gives students who are unable to continue their education in Hong Kong a second chance to enter a college or university. Only students with high marks qualify to continue; others choose vocational training or opt to study abroad.

Hong Kong Universities

Hong Kong is expanding its tertiary education segment significantly. Thirteen local institutions now offer degree programs, eight of which are government-funded universities, four are colleges and one is a private university offering degrees. All already have, or are considering, introducing associate degree and higher diploma programs which would provide alternatives for students wishing to continue their studies locally. These two-year programs can be articulated into full degree studies in Hong Kong and abroad.

At the end of form seven, students bound for university take a second examination, the Hong Kong Advanced Level Examination (HKALE). Government policy for the past eight years has dictated that there are only enough spaces at the tertiary level for 18% of all high school graduates.

Universities also have an early-entry program for exceptional students after form five. The Early Admissions Scheme is administered by the University of Hong Kong (UHK), Chinese University of Hong Kong (CUHK) and Hong Kong University of Science and Technology (HKUST). Candidates scoring six or more 'A's (distinctions) in the HKCEE, and scoring 'C' or above in their language subjects, are eligible to apply. Successful applicants are granted admission without the need to sit for the HKALE. Students in this category may expect Canadian colleges and universities to grant a similar concession after form five.

Hong Kong is anticipating that foreign tertiary institutions will offer their courses locally—after they have received accreditation from the Hong Kong Council for Academic Accreditation (HKCAA). Selective degree programs are either offered by foreign universities themselves or through private means. The Richard Ivey School of Business currently offers an Executive MBA program in Hong Kong.

The Hong Kong Institute of Education (HKIED) has developed partnerships with foreign universities. One program within the Centre for International Education involves integrating the Institute's immersion, exchange, and study abroad programs. These programs are offered abroad, including Canada. (The immersion program is part of the Bachelor of Education [Language Teaching]) degree.) HKIED lists the University of British Columbia and the University of Prince Edward Island as partners. A review of staff research, and language-related projects, gives an excellent overview of Hong Kong's language focus.

Ten Canadian colleges and universities are on the HKCAA accreditation list to offer degree or diploma programs in Hong Kong. Many other foreign institutions also offer credit and non-credit programs with funding assistance from several government initiatives. The Education and Manpower Bureau (EMB) continues to report a shortage of trained English teachers and welcomes additional training programs.

In response, the University of Hong Kong's Faculty of Education has launched a double degree program (B.A. and B. Ed.) in English Language Education. Chinese University's Faculty of Education has also launched a similar program.

International Schools

International Schools, which are considered private, enrolled 32 500 expatriate and local students in 2004. Although most require tuition fees to operate, some are funded by foreign governments (e.g. Korean and Singapore International Schools), while others use foreign curricula (e.g. from Canada, Australia, and the United Kingdom).

International Christian School and Concordia International School are examples of International Schools that use curricula developed by their own organizations. The International Baccalaureate is becoming more popular with a number of international schools.

English language requirements vary among International Schools. Some include a formal testing program in their admission process and will only accept fluent English speakers, while others accept students whose English level requires support.

The Civil Service Bureau's Local Education Allowance (LEA), a legacy British funding scheme, is still available to help civil service personnel educate their children in International Schools. Officers may apply for tuition assistance for children aged nine through nineteen. Under the LEA scheme, International Schools are considered "approved" schools for the children of civil service employees. A small group of officers may still receive assistance for their children's education in British schools, including tertiary education. The same conditions apply as for the LEA. This opportunity is being phased out but is still advantageous to British providers of English language training.

The largest provider of English medium spaces among Hong Kong's International Schools is the English Schools Foundation (ESF). ESF has nineteen International Schools, six of which are secondary schools. Only schools operated by the English Schools Foundation are eligible to receive government assistance.

Three International Schools in Hong Kong offer a Canadian Secondary School Diploma: Canadian International; Phoenix International; and Delia School of Canada. A fourth, P. C. Lau Memorial Christian Alliance International School, offers the Saskatchewan Diploma.

The British curriculum is the most popular, with a large number of students sitting for the International General Certificate of Secondary Education (IGCSE). Next in popularity is the International Baccalaureate and the Canadian diploma. ESF has announced its intention to switch from the British to the International Baccalaureate curriculum; other international schools are expected to follow ESF's lead in the near future.

Private Language Centres

Many types of language centres operate in Hong Kong, most providing English language training. Students progress through a series of proficiency levels that must be completed successfully for them to be certified as fluent. Some centres focus on providing required upgrading for students wishing to study abroad or to enhance employment opportunities through courses consistent with the Continuing Education Fund. Others are comprehensive Language Training Centres, offering services such as general English language training, corporate language training, translation services and test preparation. Some are locally developed, some are franchises of multinational corporations, while others are quasi-governmental, having been set up by foreign missions or developed by "study abroad" agencies that prepare students for foreign study.

Direct Subsidy and Private Independent Schools

Fifty-five private schools operate under a Direct Subsidy Scheme (DSS). The DSS was introduced by the Education Department to enhance the quality of private schools at the primary and secondary levels. A DSS school is a private school which has been granted greater flexibility in designing its curriculum. DSS schools also receive operating subsidies based on enrollment. Individual schools collect additional tuition fees to meet operating needs. While DSS schools have greater flexibility, in most cases they still follow the local curriculum.

Private Independent Schools (PISs) have recently been introduced into Hong Kong. A PIS school offers an alternative to the best International Schools. They are eligible to receive a “land and construction” grant but are otherwise financially independent and rely on tuition fees to operate. Eight have been authorized. Canadian Phoenix International became a PIS school in 2006, and will change its name to Renaissance College in 2007 when it converts from an Ontario to an International Baccalaureate (IB) curriculum.

Study Abroad

Recent census data reveal that approximately 74 100 Hong Kong students under the age of 25 study abroad and that Canada is the preferred destination by many (26.5%). The traditional capping of spaces in Hong Kong has restricted the number of students able to study at home.

Students who wish to study in Canada for longer than six months require a study permit. Unless a student holds dual citizenship (Canadian/Hong Kong), a Hong Kong student must present a Hong Kong Special Administrative Region passport or a British National Overseas passport. Either passport is accepted for entry to Canada without a visa. Students from mainland China, even with temporary Hong Kong identity cards, require a temporary visa to enter Canada in addition to a study permit.

Most Hong Kong students need to upgrade their English language skills before beginning their academic program, and an untold number of agencies have entered the market to offer this service.

Key Factors Shaping Market Growth

According to the Hong Kong Sustainable Development Index Survey, which was conducted by the City University of Hong Kong and the Canadian Chamber of Commerce in Hong Kong, education remains a high priority in Hong Kong. Nevertheless, the gap between the importance assigned to education and overall satisfaction with the educational system remains an issue.

There is a growing perception in Hong Kong, especially within the business community, that English language standards are falling among the general population. Several factors may account for this, including the growing number of expatriate English

speaking families returning home, Hong Kong citizens who are fluent in English emigrating to Western countries, and the growing emphasis on learning Chinese in Hong Kong schools.

Shortly after the British handover of Hong Kong, many local schools switched from English as the medium of instruction to Chinese (i.e. Guangdonghua). Closer ties with China also increased interest in both the public- and private-sectors in developing fluent speakers of Putonghua. Therefore, to ensure their children learn English, more parents are sending their children to International Schools. Once attended primarily by expatriate children, these schools are seeing an influx of local children whose parents are trying to ensure their children are educated in an English-speaking environment.

Educational Reform

Recognizing that effective, systemic change requires co-operation between public-sector and private-sector institutions, the government created the Standing Committee on Language and Research (SCOLAR) in 1998. SCOLAR was tasked with reviewing Hong Kong's education system, performing a workforce analysis, and updating international policy and practice. A "culture of language acquisition" is now developing in Hong Kong as a result of these efforts.

The culture of language acquisition has been supported by systemic reports and legislation with specific, official, governmental recommendations and funding directly attached to education and language training. This has enabled the private language sector to complement the public-sector initiatives being undertaken.

SCOLAR has investigated and advised on the respective roles of the government, school management, teachers, parents, employers, the mass media, and the language learners themselves in reforming the education system. Raising language training standards—particularly in English, which some in the industry believe have been compromised in recent years—is crucial.

Two major studies commissioned in 1998 provide the framework for Hong Kong's current educational reforms. The *Medium of Instruction Guidance for Secondary Schools* outlined a mechanism for determining the medium of instruction.

In 2003, SCOLAR provided the rationale for language policy and its implementation in the final version of its *Action Plan to Raise Language Standards in Hong Kong*, drafted in 2001.

The government agreed to a further review of the medium of instruction for secondary schools in the 2003/04 school year. In 2005, the Working Group on the Review of Secondary School Places Allocation and Medium of Instruction for Secondary Schools produced its review after seeking input from the community.

The most dramatic reforms are those proposed by the Education Commission. The commission recommended the replacement of the HKCEE and HKALE examinations

with a single set of examinations as well as reducing secondary schooling from four years to three by 2009. University courses would be extended from three years to four.

Traditionally, approximately 55% of students entering primary school leave after writing their HKCEE, with only 32% able to find places in forms six and seven. Only 25% of students who start school have been able to find spaces in institutes of higher education, with only 18% accepted to local universities. Many of the students leaving school two years short of matriculation end up going overseas to study. Countries providing foundation courses or other pathways to higher education offer these students a second chance to become educated.

As part of its educational reforms, the government will eliminate form seven, end form six with one test and mark graduation with the new Hong Kong Diploma of Secondary Education (HKDSE). This will mean that the last seven-year cohort under the old system and the first six-year cohort under the new system will graduate together, which will have implications for both the secondary schools and the university system and a residual effect on admission decisions to colleges and universities abroad. There will be three possible outcomes:

- local and non-local course providers will have set up more courses in Hong Kong to accommodate the large graduating cohort;
- more students will be looking for places abroad; or
- a combination of both.

Under the proposed syllabus, all students will study in a three-year secondary school program which will include compulsory English, Mathematics, Chinese and Liberal Studies as well as two or three optional subjects. Both traditional academic subjects and more career-oriented courses will be offered. A significant proportion of student evaluation will come from school-based assessment. This reform is aimed at giving more students access to a high school education that will equip them for university. This has major implications for the “study in Canada” industry at both the secondary and tertiary levels.

Hong Kong welcomes non-local involvement in the expansion of its tertiary sector, with local universities very willing to make agreements with overseas institutions. They are exploring top-up degrees whereby an overseas institution might evaluate the sub-degree or associate degree courses for the purpose of articulation to the final year or final two years of a degree program for students who meet their criteria. Hong Kong is also looking at options involving the private sector. Incentives include granting land at nominal prices, offering start-up loans and extending student finance to private institutions. The advantage of taking part in the program outside of Hong Kong has been acknowledged. The government has also explored the establishment of community colleges to accommodate students.

Over the next decade, the Hong Kong government intends to increase the number of tertiary education spaces available from 18% of the cohort year to 60%.

To this end, two-year diplomas and associate degrees similar to those offered by Canadian colleges have been introduced. The government expects articulation agreements to be forged and has begun negotiations between Hong Kong and Australian, British and U.S. universities. The intention, too, is to encourage more students from mainland China to enter Hong Kong associate degree (AD) programs or similar programs offered by Hong Kong universities on the mainland.

Applicants from China holding an AD from Hong Kong would be well-regarded by Canadian university admissions officers, particularly in cases where the Canadian university has an agreement for credit transfer with the AD provider.

Teacher Language Proficiency Training/Testing Program

Private schools have a regular turnover of qualified English teaching staff. To ensure a steady supply of trained teachers for language centres, pre-school, kindergarten and adult education, training is offered through TESOL training programs. The British Council is one of the largest providers of TESOL training.

The Advisory Committee on Teacher Education and Qualifications has developed a *Teachers Competency Framework* (TCF) aimed at raising standards for teachers. This framework takes into account the abilities, skills, knowledge and attitudes expected of teachers in different work areas and at different stages of their professional growth. The framework includes a model of teacher professional development that suggests minimum standards for professional growth over three years. The *Teacher's Competency Framework* is accessible from the EMB Web site.

The Committee on Teacher Education and Qualifications is recommending a trial period, during which its recommendations will be evaluated and refined prior to a full implementation process slated to begin in 2007. This is similar to the now-discontinued Professional Learning Program introduced by the Ontario Ministry of Education.

In its report, the Committee on Teacher Education and Qualifications emphasizes the role to be played by non-local providers. It includes the provision for overseas study, overseas conferences, workshops, and professional activities, all of which may be offered in Hong Kong or abroad.

In 2000, the Education and Manpower Bureau (EMB) introduced language proficiency assessment testing for teachers of English and Putonghua. During the first round of testing, a large number of teachers of English failed the basic language proficiency test. Data from 2003 indicate that out of 14 907 English teachers working in primary or secondary schools close to 11 000 teachers either did not hold a degree majoring in the language they taught, or had not received any teacher training in the relevant subject, or both.

To address this, the government has given all teachers of English until September 2006 to improve their proficiency. Teachers are free to choose from approved courses, either in Hong Kong or abroad, that best suit their needs. Teachers may be reimbursed up to

HK\$30 000 (\$4600) upon submission of tuition receipts and proof of successful course completion.

The Professional Development Incentive Grant Scheme for Language Teachers will continue to encourage and assist working teachers in acquiring higher professional qualifications in language teaching. To encourage teachers of Putonghua and English to enhance their subject knowledge and pedagogical skills in language training, \$46 million in additional funding has been allocated from the Language Fund.

Specific criteria for program providers are available from the EMB. Local Hong Kong universities and Australian and New Zealand universities have been accepted as providers of English language training in Hong Kong and abroad. The University of Queensland offers programs both in Hong Kong and Australia, while the Queensland University of Technology and Otago University offer programs in Australia and New Zealand, respectively.

All non-local providers must first have their courses accredited by the Hong Kong Council for Academic Accreditation (HKCAA) before offering language teacher training.

Funding Support for Institutions

Within a decade, Hong Kong's tertiary institutions will be unable to provide sufficient spaces for student applicants. Canadian providers may be eligible for land grants and start-up grants to set up programs in Hong Kong. Reimbursable grants to students who take courses are available should Canadian providers wish to offer language or other training in the future.

In the Policy Address in 2000, the government clarified its intention to work with non-local, not-for-profit, education providers while at the same time developing partnerships with entrepreneurs to improve universal access to education. The government announced four funding measures totaling \$763 million to encourage non-local providers to participate in the expansion of Hong Kong's post-secondary programs.

These initiatives include financial assistance in the short- and medium-term to post-secondary education providers. Funds will cover short-term rent; renovations; start-up equipment; a land grant for the construction of purpose-built premises for non-profit post-secondary providers; an incentive for quality secondary school providers to submit courses for accreditation to the Hong Kong Council for Academic Accreditation (HKCAA); and reimbursement for government rents and fees for post-secondary education providers.

University Grants Committee

At the post-secondary level, the University Grants Committee (UGC) has allocated funds for the creation of Teaching Development Grants in all UGC-funded institutions as part of its effort to improve the quality of teaching. Grants are intended to encourage, promote and reward innovative approaches to teaching and/or improvements to the learning environment in the UGC-funded institutions. All of the publicly funded

universities have accessed the fund and are now developing their on-line and distance learning approaches to delivering courses and supporting their students. These grants are not available to overseas providers but foreign universities that partner with Hong Kong universities can be included in projects.

Continuing Education Fund

The \$763-million Continuing Education Fund (CEF), which was established in 2002 to subsidize adult learning, has been extended. This fund has a separate focus from that outlined by the Teacher's Competency Framework. The CEF objective is to provide subsidies to people pursuing continuing education with the ultimate goal of preparing Hong Kong's workforce for a knowledge-based economy.

To be eligible, applicants must be between the ages of 18 and 60 and are reimbursed 80% of their fees, up to a maximum of \$1500, upon successful completion of an eligible course or course module(s). The fees for more than one course may be reimbursed, up to a maximum of \$1500 per applicant.

Language is one of seven major market segments eligible for subsidies. Up until September 2004, 41 900 people have been approved for language-related programs through the CEF. Currently 190 approved, reimbursable English courses are offered by 160 providers. Providers include colleges and universities, language centres, youth groups and social organizations and private companies, both local and non-local. Only 12 providers offer more than five courses; most offer only one course. As well, seven French language providers offer ten courses.

Successful completion means meeting language benchmarks recognized by the CEF. While there are several English tests listed, the most familiar being IELTS and TOEIC, the TOEFL is not listed as a benchmark test.

Non-local and local providers alike have been offering programs to support students wishing to take advantage of this government initiative. The courses must meet CEF criteria, but language providers willing to enter the market with programs in English, French, German, Japanese and written Chinese have opportunities to enhance their profiles by attracting students to their overseas Canadian programs as well.

All courses must be offered in Hong Kong. However, non-local providers as well as local providers have developed "reimbursable courses" which are delivered by international institutions in Hong Kong. Information about registering as reimbursable course providers, for all sectors, is available from the Hong Kong Council for Academic Accreditation (HKCAA).

Workplace English Campaign

The Workplace English Campaign (WEC) was launched in 2000 as part of a series of recommendations by the Standing Committee on Language Education and Research (SCOLAR) on ways to enhance Hong Kong's competitiveness as an international centre for business, finance and tourism. The WEC aims to heighten public awareness of the

importance of having a good command of English in a workplace environment and, ultimately, to improve the knowledge of English within Hong Kong's workforce.

Workplace English benchmarks have been established in certain sectors for selected jobs to serve as a reference for employers when recruiting and developing human resources. Employers within these sectors can refer to the benchmarks to specify English standards for different job types within their organization. The system helps employees understand employer's expectations with respect to English standards; employees can use these benchmarks for self-improvement and ultimately for career advancement.

The funding scheme for the Workplace English Campaign is channeling its resources to customized in-house English training commissioned by employers for their employees. Students in WEC classes demonstrate success by passing any of several specified International Business English examinations. About \$9.8 million was allocated for this purpose in 2005.

Language training programs are also available from the Employee Retraining Board as part of the Vocational Training Council's vocational education and training programs.

Quality Education Fund

Since 1997, the government has funded special school projects under the Quality Education Fund (QEF). The Fund is designed to provide incentives to encourage schools, teachers and other educational professionals (especially organizations and practitioners) to seek additional resources outside those provided under the existing system. Target areas for the QEF include improving school management, developing all-around education and implementing pilot projects on innovative curricula or teaching methods.

Funding projects fall into five categories: 1.) promoting effective learning; 2.) promoting all-round education; 3.) implementing school-based management; 4.) research into education issues; and 5.) IT applications.

Schools may develop projects in co-operation with organizations, institutions or other professionals in the private sector, in short, any entity capable of helping them achieve their goals. This fund is mainly accessible to those providers willing to establish a presence in Hong Kong. To take advantage of the QEF, Canadian language providers must therefore be willing to make this commitment and are advised to develop working relationships with schools to help them meet the objectives of the fund. Schools would in effect develop a project proposal with a provider, apply for funding based on the proposal, after which the school would contract the provider to deliver the project.

Composite Information Technology Grant

In July 2004, the Education and Manpower Bureau (EMB) merged four funding schemes into a single Composite Information Technology Grant (CITG). The CITG will continue to cover requirements for continuous implementation of IT in education

including the purchase of related consumables, resource materials for learning and teaching, and on-going professional development.

The government has also developed an Information Literacy Framework for Hong Kong students which includes a software development incentive aimed at addressing future requirements in the sector.

Schools can access the funds by submitting proposals that describe their needs. On-going matching funding will be available through the Quality Education Fund. Details of the incentive funding for developing software can also be found on the EMB Web site. Language providers must connect with schools directly and work with them to provide IT-based language services.

Medium of Instruction

The Hong Kong government is aiming for the next generation of citizens to be bi-literate (Chinese and English) and tri-lingual (Guangdonghua, Putonghua and English).

Historically, Hong Kong's government has regarded the knowledge of English as the key to becoming a successful, cosmopolitan community. As such, it places high importance on Hong Kong youth mastering English and, accordingly, has taken on the responsibility of supporting English language education.

All International Schools must offer an English stream. Those with a non-Chinese or non-English language focus (i.e. Korean, Japanese, and French International) must also offer an English language stream, in addition to the main language of the school. The British curriculum is usually the curriculum of choice.

Learning Putonghua is fast becoming as important in Hong Kong as learning English, a fact increasingly reflected in the policies and current planning for future language development. There is a perception among language training stakeholders that fluency in Putonghua has an “emotional” component i.e. learning the language of mainland China will in some measure contribute to Hong Kong's sense of belonging to an extended cultural “family”. All schools have included Putonghua to some extent in their language program offerings.

Local secondary schools are classified as either English medium (EMI) or Chinese medium (CMI) instruction schools. There are 112 EMIs, 23 International Schools, and 384 CMI secondary schools. Language providers will be interested in those students graduating from CMI schools who require further English language training. Canadian colleges and universities will also be interested in graduates of EMI schools, many of whom also require additional English language support.

Hong Kong is now completing a report on the medium of instruction, and the conclusions will provide guidance to schools, helping them determine whether instruction is to be carried out in English or Chinese, or both in the future. At present, the government is committed to the use of “mother tongue” as the medium of instruction within individual local schools.

Language Testing

Hong Kong students wishing to study abroad are required to provide their English Language Proficiency score as part of the acceptance criteria. Many small language centres, study abroad agencies, comprehensive language centres, and educational institutions offer courses in test preparation.

The government has introduced benchmark testing for teachers, as well as for its own workforce, through three government schemes: the Workplace English Campaign, the Continuing Education Fund, and the Teacher Language Proficiency Training/Testing Program. The requirement for English language benchmarks in business and industry is another indication that English testing is becoming an integral part of Hong Kong's culture of language acquisition.

The Hong Kong Examinations and Assessment Authority (HKEAA) determines the examinations that can be used for both WEC and CEF courses. Canadian providers should also note that examinations are specified for both the English and French language.

Specific language tests are approved according to the purpose for taking a course. Although there are many different language tests available, the most widely used is the International English Language Testing System (IELTS). The IELTS is owned, developed and delivered through a partnership between the British Council, IDP, IELTS Australia and the University of Cambridge ESOL Examinations. The Civil Service Bureau uses the system to assess prospective public-sector employees, while colleges and universities use it as their exit test. Students intending to study in Australia and the United Kingdom also prepare to take IELTS for admission purposes.

There are two IELTS tests available, one to assess general proficiency and a second to gauge a student's ability to study at the tertiary level. The Canadian government uses the general level IELTS as a measure of a person's English language capability for immigration purposes along with the University of British Columbia's Canadian English Language Proficiency Index Test. Less popular is the Test of English as a Foreign Language (TOEFL). TOEFL is seen, by some, to be compromised as a test, particularly when offered in China. Its use has therefore diminished as an English language test in Hong Kong although this may change with the introduction of the new version of the TOEFL.

The Canadian Academic English Language Test (CAEL) is the only Canadian test available in Hong Kong. CAEL, developed by Carleton University as a Canadian alternative to the IELTS and TOEFL, is administered by the Canadian Education Centre Network (CECN).

Foreign schools with their own tests have them proctored locally through agreements with the Hong Kong Examinations and Assessment Authority (HKEAA).

Computer-assisted Language Learning

The deployment of information technology in education is another major government focus. In 1998, the government embarked on "Information Technology (IT) for Learning in a New Era", a five-year strategy aimed at providing guidance and strategies for integrating IT into education. Shortly after, the government issued its *Information Technology for Learning in a New Era: Five Year Strategy - 1998/99 to 2002/03*. In 2003, the government began a review and consultative process and issued *Toward Technology in Education: Way Forward: March 2004*. The report assessed the accomplishments to date, provided a vision for the future, outlined plans to achieve strategic goals and suggested proposals for implementation, including funding allocations.

A 2004 assessment indicated that, on average, each primary school had 91 computers and each secondary school had 247 computers, well above the targets of 40 and 82, respectively. Although many electronic education resources have been developed, quality remains an issue in that some e-learning resources have failed to meet the needs of schools. Retrieving necessary e-resources is another problem i.e. schools, teachers, tertiary institutions and the private sector alike are finding it difficult to access quality material.

Schools typically have broadband Internet access, over 60% using optical fibre with bandwidths ranging from 10 to 100 Mbps. Over 95% of schools in a recent survey had developed Web sites and over 60% used an Intranet or learning management systems. According to a 2003 survey by the Census and Statistics Department, 91% of students aged 10 or over had a computer at home, most of which (93%) were Internet-enabled.

The five-year strategy also focused on improving the knowledge and skills of teachers. By the end of the 2002/03 school year, all teachers (about 50 600, including 4600 teaching assistants) had completed IT training at the Basic Level, 35 600 (77%) teachers completed the Intermediate Level, 12 500 (27%) teachers completed the Upper Intermediate Level and 2600 (6%) teachers completed training at the Advanced Level.

Hong Kong Education City (HKEdCity), an education portal sponsored by the Education and Manpower Bureau (EMB), promotes IT as a key element in quality education and lifelong learning. The portal is popular with students and teachers alike who enjoy sharing ideas on-line. An "English corner" on the site provides resources for teachers to encourage English language learning.

HKEdCity continues to receive government support and is now developing ways to improve its effectiveness as an e-learning and e-business platform for teachers, parents and students.

Some 20 schools in various districts are involved in setting up a territory-wide network of Centres of Excellence for IT in Education. The centres advise schools about

implementing systems and networks, teacher training and IT promotion, as well as ways to integrate IT into the curriculum. It has also become an effective platform to pilot new technology and pedagogical techniques. The government has now begun to transform the Centres for Excellence into “Learning Centres” aimed at enhancing teachers’ professional development through the sharing of best practices. Enhanced partnerships between schools and the private sector are being encouraged, e-learning is being promoted and teachers and principals continue to be trained.

The EMB’s recently published *Empowering Learning and Teaching with Information Technology* includes strategies and timelines for integrating IT even further into the learning and teaching process. The government has begun to set learning targets to equip students with the required skills, knowledge and willingness to make full use of IT for lifelong learning.

The EMB is setting up a Qualifications Framework (QF), a mechanism that standardizes quality assurance across a range of sectors in Hong Kong. The QF will clarify the standards required for courses and for course providers. The intention is to provide information to empower learners to upgrade their skills.

To consolidate ownership within the private sector, the EMB is setting up a number of Industry Training Advisory Committees to develop training specifications for individual industry sectors. Each committee will define competency standards, establish qualifications for different job levels, and develop assessment criteria. Employers, employees, and professional organizations are represented on the advisory committees to ensure that training goals are met and qualifications are widely recognized. The EMB has already carried out a pilot study for the IT sector.

At the tertiary education level, institutions have been strengthening the IT component in their programs and courses. Programs that allow specialization in particular areas, such as e-commerce, information engineering and creative media, have been introduced.

The University Grants Committee has provided funding to facilitate co-operation between three universities on MegaWeb, a development project aimed at enhancing learning, teaching, and curricula within a university-wide integrated Web-based framework. The project is co-ordinated by Hong Kong Polytechnic University for City University and Chinese University. The e3Learning project will receive funding to develop a comprehensive Web-based learning system. The project will include on-site development, the creation of new technologies (especially mobile e-learning) and will include project evaluation.

The development team has been involved with around 161 sub-projects, 76 of which have already been evaluated. Of these, 14 projects were undertaken in the language field, each aimed at replacing traditional teacher delivery methods with on-line delivery of instructional materials.

The Open University of Hong Kong (OUHK) focuses almost exclusively on on-line learning, in particular making distance education accessible to adults. Its 20 500 students include 19 900 e-learners. OUHK comprises six academic units including the

School of Education and Languages which offers various programs leading to qualifications up to the doctoral level. Each program features on-line components with both in-class tutorial and on-line support.

Eight publicly funded universities have co-operated to create a Learning Resources Community that has developed LEARNet, an on-line system for sharing quality educational resources among Hong Kong's tertiary institutions.

LEARNet has the following characteristics:

- Leverages the Internet and internationally accepted XML standards to make appropriate, relevant and credible learning materials available to educators and students.
- Provides financial, technical and pedagogical support for materials developers.
- Provides assistance, evaluation and feedback to developers and users of learning objects.

Among the resources recommended by LEARNet are two Canadian repositories: Broadband Enabled Lifelong Learning Environment (BELLE) and Campus Alberta Repository of Educational Objects (CAREO).

The government views these IT initiatives as supporting the goals articulated by SCOLAR. A number of specific items presented in the SCOLAR report are of special interest to language training providers, including two that suggest collaboration with overseas partners:

- No. 28—to enhance partnerships with NGOs, the private sector and overseas communities on programs to promote the use of IT in learning among students and to cultivate students' global perspective; and,
- No. 65—to collaborate with local and overseas communities with a view to exploring the setting up of a Hong Kong-based research centre to pioneer leading-edge IT applications and to devise creative means of incorporating IT into various pedagogical applications.

Native English Teacher Scheme

In 1998, the government launched a Native English Teacher (NET) scheme to provide all public secondary schools with native English-speaking teachers. In 2002, the government introduced the follow-on Primary Native English Teacher (PNET) scheme.

Hong Kong invested \$68 million in 2005 to finance the placement of a native English teacher (NET) in each government-funded school. More information about the NET scheme and teaching vacancies is available from the Placement and Support Section of the EMB. The Canadian Education Centre Network (CECN) has an agreement to provide NET teachers and features the NET FAQ Section on its Web site to provide additional useful information. NET teachers have also organized the Native English Speaking Teachers' Association (NESTA) which provides information on teaching and living in Hong Kong from a teacher's perspective on its Web site.

While NETs are expected to enhance students' English language proficiency, they are also expected to play a key role in supporting the professional development of other teachers in English departments. NETs will also serve to promote the on-going review and development of the English curriculum at the primary level. As such, they are expected to lead to the introduction of novel pedagogic approaches into the schools.

Initially, one NET was allocated per secondary school (currently 472) and one to every two primary schools. The EMB target in 2005 was to double the allocation for primary schools (currently 313) by providing a NET for every primary school. NET and PNET teachers are recruited mainly from Canada, the United States, the United Kingdom, Australia and New Zealand. Teachers must be certified. Training in linguistics is expected rather than TESL training without formal teacher training. There were 152 Canadian NET teachers in 2005.

The NET and PNET schemes have received mixed feedback. The government is concerned about the high annual turnover of teachers, either teachers leaving Hong Kong or using the NET scheme as a springboard to employment in International Schools. In October 2005, the EMB allocated an additional \$7 million to wages (bringing the annual budget to \$68 million) to increase teacher retention. The University of Melbourne and the Hong Kong Institute of Education are currently reviewing the results of this incentive on behalf of the EMB.

The EMB framework includes general professional development expectations for teachers and guidelines aimed specifically at language teachers. The framework addresses language proficiency training, testing and upgrading.

Those seeking qualified teachers (e.g. local schools) usually contact teacher recruitment agencies. Currently, the Canadian Education Centre Network (CECN) is directing teachers to Hong Kong schools.

Translation

The Civil Service Bureau maintains an Official Languages Division with 423 translators, 12 simultaneous interpreters and 182 calligraphists to provide translation support throughout the civil service. While the demand for translation services is extensive, it is primarily in the areas of transcription, proofreading, voiceovers, and other business-related marketing services.

Culture is a key consideration in this market segment. Understanding the fundamental difference between the business culture of Hong Kong and that of mainland China is critical. Hong Kong considers itself sufficiently sophisticated to be at the forefront of promoting products and services to the world, while the mainland is a relative newcomer on the scene. On the other hand, China is a growing presence in the translation sector because of the low cost of labour for translation and printing services on the mainland. Canadian translation companies may wish to consider partnering with companies in mainland China to provide services for the Canadian corporate sector.

Hong Kong's translation sector is focused on China's emerging consumer society—one billion potential customers—and to a lesser extent on the rest of the international community. The translation of marketing material from English to Chinese must take into account the two different Chinese scripts: one for Hong Kong and Macau (traditional Chinese) and the other for China (simplified script).

Translation services providers in Hong Kong pay particular attention to what is termed “multicultural marketing”, whereby translated documents must not only convey the same context as in English, but must allow the company to position itself culturally.

The need for interpretation is mainly among foreign business people meeting face-to-face with their counterparts in China. With the high level of English fluency within the business community, interpretation is usually handled internally through in-house translators for business meetings.

Simultaneous translation is seldom provided. Presentations are either made in English or in Guangdonghua with print and media resources available either in the language of the presentation or in a bilingual format.

A number of local and foreign companies provide a range of language services, including translation.

Four universities offer translation programs: the Department of Translation, Lingam University; Department of Chinese Translation and Linguistics, City University of Hong Kong; Centre for Translation, Baptist University; and the Department of Translation, Chinese University of Hong Kong.

The Hong Kong Translation Society is a non-profit, professional body whose mandate is to enhance the standard and professionalism of translation (both oral and written). It is an excellent contact for language training providers interested in the Hong Kong market. The Society features luncheon talks and seminars, conferences and their publication the *Translation Quarterly*, all of which are valuable sources of competitive intelligence about the special characteristics of the Hong Kong and Chinese markets.

Opportunities

Local Programs

Schools in Hong Kong seek training programs to bring an international perspective to the teaching of English as a Second Language (ESL). The Department of Education for the State of South Australia, for example, has just completed a major training phase for seventeen schools on the topic of ESL in the mainstream. The PNET scheme is currently being evaluated co-operatively by the University of Melbourne and the Hong Kong Institute of Education.

There are opportunities for both colleges and universities to access grants and other funding schemes, provided they provide training programs in Hong Kong. Most of the 28 000 new places promised in the government's Policy Address in 2000 will be at the

associate or sub-degree level. It is likely many students will want to convert their associate or sub-degrees into full degrees. Demand could start building for degree conversion as early as 2007.

With the growing numbers of students accessing degree programs, more post-graduate courses will be required. Language will continue to be an issue for many. The government wants the support of non-local providers and will provide financial incentives. Non-local providers could tie in language enhancement and the beginning stages of a college or degree program in Hong Kong with the completion of the degree in Canada. The opportunity also exists for Canadian institutions to supply post-graduate programs to students in Hong Kong.

Student Recruitment—Study Abroad

Hong Kong's study abroad market is valued at close to \$1.85 billion. In May 2002, 74 100 Hong Kong citizens aged 25 and below—almost 3% of Hong Kong's 60 900 households—were studying abroad. More than one quarter (26%) of these students were studying in Canada, 22% in Australia, 22% in the United Kingdom, and 18% in the United States.

Most students travel overseas to study because the number of spaces in senior secondary is capped. This is because of the limited number of spaces at the tertiary level.

Students intending to apply directly to college or university begin considering their options in the fall. Australian universities are the first to recruit because their school year begins in January and this gets university-bound students thinking early. Most students and parents, however, begin making their decisions either just after Chinese New Year or just after the HKCEE has been written. The advent of the lunar new year provides a certain psychological impetus for parents to seriously consider their child's next step.

Students from CMI schools and many from EMI schools need English language upgrading upon arrival. Only a few International Schools restrict enrolment to native English speakers so some international students will also need support.

Competition is coming from Australian Technical and Further Education Colleges (TAFE) where students feel that they are completing their language study on a college campus with the opportunity to go on to university. Now that Hong Kong is developing "sub-degrees" or associate degrees, students are more accepting of the community college concept which is still not the case in mainland China.

Educational institutions use a combination of approaches to recruit students:

- Most local students seek help in selecting a school in Canada from study abroad agencies. Canadian institutions make agreements with local agencies to be featured in the agency brochures which are provided to students and parents and to have their school's promotional material distributed. Agencies handle everything, including collection of tuition fees and help applying for study permits.

- Agents provide opportunities for school representatives to offer seminars to prospective clients when they visit Hong Kong. The institution does not need to be involved, except for an annual or semi-annual visit to update the agent about programs. Agencies advertise the seminars and invite clients interested in Canada to attend.
- Many schools take advantage of student recruitment fairs, which are very popular. Although fairs are sometimes country-specific, most are organized by local agencies promoting schools from many countries. Three fairs are held which are specific to Canada, two of which are organized by the CECN and a third by International Education Services. Both are headquartered in Vancouver and have offices in Hong Kong.
- The study abroad recruitment of students is becoming more competitive. A survey of the trade missions for Australia, New Zealand, United Kingdom and the United States suggests an overall decline in the number of student applications. Australia, New Zealand and the United Kingdom each have an education department attached to their missions in Hong Kong to support their education sectors. Officers are available to assist parents, students, agents and schools.

An untapped market comprises Canadian passport holders who are largely ignored by agents. Canadians do not need study permits or visas to study in Canada and are therefore not a source of revenue for agents. However, since a Canadian passport does not indicate English language fluency, language training providers are advised to find strategies to identify and target this group.

Local Chinese and English newspapers report on education and the language industry regularly. Several newspapers put out an education supplement featuring study abroad opportunities. These usually appear at times when students are considering their choices for the coming year. Most have special supplements each July.

Education supplements are published to coincide with the release of HKALE and HKCEE examination results in July and August, respectively. The English language newspaper, *The South China Morning Post* includes a Saturday education section featuring Katherine Forestier, as education writer and editor. *Shin Pao*, a Chinese language paper, includes a weekly feature on education.

Key Chinese language newspapers also include sections on education and regularly publish feature articles about student experiences with overseas schools. Most articles discuss the difficulties rather than the successes at overseas schools. Two newspapers, *Metro* and *Jiu Jik*, are distributed free-of-charge and many schools use them to advertise.

Language providers in Hong Kong will also find opportunities to provide language services to returning Chinese expatriates. A good avenue for advertising these services is on the Web sites of Hong Kong's estate agents, which are geared to incoming

expatriates. Many agents serving “expats” provide this type of information on their own Web sites as a community service.

International Schools and some local schools build in travel opportunities for their students during breaks in the school year. Both winter and summer activities with a language component would be an appealing addition to Hong Kong school excursions.

Opportunities exist throughout the academic year, as well as during the summer, for Canadian institutions to organize and/or participate in exchanges, study tours and English language-related opportunities with local schools in Hong Kong.

Teacher Training

The government’s teacher education and professional development in-service initiatives allow teachers to attend overseas conferences or participate in teacher training programs. English language teachers were required to be fully qualified by 2005 or lose their positions as language teachers. These teachers will continue to seek training. Expectations for ongoing professional development, funding to improve workplace English, preparation for benchmark testing and a system dedicated to improving English literacy will create more opportunities for future teacher training.

The University of Queensland, the Queensland University of Technology, Faculty of Education from Australia and Otago University from New Zealand have already taken advantage of these opportunities. Opportunities exist for Canadian institutions, as well, to organize programs in which Hong Kong teachers come to Canada for training.

Franchises

A well-established Canadian provider with a good reputation may want to consider working with a partner in Hong Kong willing to accept a franchise to develop the market. Educational institutions have also partnered with educational consultants in Hong Kong. The University of Queensland is partnering with F & C Consultants to offer teacher training. The Web sites of Kaplan Educational or Wall Street Institute provide information about educational franchising operations.

Students living in the New Territories or West Kowloon who choose to attend a Canadian school must travel a great distance. The alternative for these students is to choose a school closer to home but offering another i.e. non-Canadian curriculum. A feasibility study would be in order to determine the viability of establishing a Canadian school, possibly a franchise, in the New Territories.

English Language Testing/ Language Test Preparation

In Hong Kong, IELTS has developed almost a virtual monopoly. There are limited resources available to help students prepare for a test that is designed to provide an accurate assessment of their proficiency in North American English.

With support from the Canadian academic community, Canada's language proficiency test developers could establish themselves internationally. At present, Carleton's CAEL test is the most widely recognized Canadian test. Should all Canadian institutions agree to support one or two proficiency tests, the Canadian test could become an alternative to the IELTS or TOEFL.

Alternatively, many Canadian institutions have developed in-house tests for admission to their programs. Some Canadian schools now use the services of the Hong Kong Examinations and Assessment Authority (HKEAA) to list their schools for testing purposes and to use their services to facilitate the writing of tests for admission to the respective universities and colleges. Providers of admission tests may consider using the HKEAA to proctor their tests locally.

Translation

While this is not the easiest market segment to access, there will continue to be opportunities for suppliers of language services for business and industry. Canada has recently signed agreements with China to further develop the business and tourism sectors. Some Hong Kong travel agencies provide group travel opportunities for both Hong Kong and mainland China tour groups. Opportunities exist to work with the tourism sector to provide bilingual guides and tour escorts for travel to and within Canada.

Guangdong Province, the richest province in China and a major manufacturing centre, abuts Hong Kong. Translation providers should monitor the development of the Closer Economic Partnership Agreements (CEPA) between China - Hong Kong, and China - Macau. As the implementation of these agreements mature, opportunities will continue to be created. Even greater potential will arise with the Pan-Pearl River Delta (Pan PRD) Regional Cooperation and Development Forum⁴. When this common market materializes, well-positioned providers will do extremely well.

Consumers in China desire the same products as consumers in the West. Strategic alliances with Hong Kong-based translation services or advertising agencies will allow Canadian companies to provide appropriate services to their clients. Strategic alliances between Canadian and local translation services providers based in Hong Kong will open the door to opportunities with mainland China and the rest of Asia.

Actual and Planned Projects

Hong Kong is prepared for the globalization of education and as such welcomes international partners to ensure success.

Native English Teacher Scheme Recruitment

⁴ The Pan-PRD is a voluntary and less formal than the European Community or NAFTA etc. It is regional cooperation to develop the PRD economy, with a focus on 10 sectors. A good overview can be found at: <http://www.tdctrade.com/econforum/tdc/tdc050201.htm>

Canadian teachers are sought after as native English teachers (NETs). The Hong Kong government and local schools currently work with teacher recruitment agencies in various countries to recruit teachers for Hong Kong schools. There will be an additional allocation to hire approximately 300 additional primary NET teachers. Currently, the CECN recruits Canadian teachers for the Primary Native English Teacher (PNET) program.

As well, language providers might consider developing models to train NET teachers. Leadership skills are needed to develop English language models for schools, which could include implementing plans geared to changing school paradigms. Proposing such changes could prove challenging as it will take place within what is often considered to be an inscrutable cultural milieu. Nevertheless, this is an area waiting to be developed by enterprising language training providers.

The International Schools Unit/ Schools Division within the Education and Manpower Bureau (EMB) provides a list of secondary school contacts for those seeking teaching posts or those interested in recruiting teachers for Hong Kong. This information is also available from the Education and Manpower Bureau (EMB) Web site. Anyone intending to teach in a school in Hong Kong must register with the EMB. The International Schools Unit is responsible for assessing qualifications and for registration.

Other opportunities to teach English as a foreign language exist at institutions other than local schools. The British Council recruits English teachers with specific teaching qualifications and experience for its various courses aimed at non-English speaking students.

Most International Schools in Hong Kong prefer to do their own teacher recruitment. Canadian teachers and principals are highly regarded in all local and International Schools. Some Hong Kong schools send hiring teams to the annual Queen's University Overseas Recruitment Fair and the Search Associates Fair in February. Others rely on referrals from teacher recruiting agencies to fill vacancies.

Workplace English Scheme

Canada has proven expertise developing workplace English training programs. Other international providers are entering the market to take advantage of current opportunities, namely setting up programs for job-specific language training. Canadian providers could establish themselves as niche players by combining several initiatives such as teacher professional development, job specific training and language initiatives through the CEF. Canada's reputation for quality and its experience in providing ESL training would be welcomed in Hong Kong.

COMPETITIVE ENVIRONMENT

Local Capabilities

Hong Kong has made an impressive financial commitment to language development through the Professional Development Incentive Grant Scheme for Language Teachers, the Teacher Language Proficiency Training/Testing Program, the Qualifications Framework for Teachers, the Continuing Education Fund, and the Workplace English Scheme.

International Competition

Hong Kong has recognized the extent to which the study abroad sector has been an economic drain while at the same time understanding that it cannot realize its goals without foreign assistance. Through its Funding Support Measures for Institutions, Hong Kong offers incentives to attract non-local providers.

In response, Australian, British and U.S. providers are now establishing themselves in Hong Kong as has New Zealand, through Export Education. There are many opportunities for Canadian providers to do likewise.

Additional funding is available for those able to meet the criteria for language training. Canadian institutions providing a program in Hong Kong, either independently or in partnership with a Hong Kong institution, will benefit in the short term. It is the long-term "branding effect", through a local presence, however, that will bring benefits in other areas of expertise on both sides of the Pacific and will ultimately open the doors for future opportunities. Hong Kong universities will certainly welcome appropriate partnerships with Canadian institutions.

Canada's major competitors in Hong Kong are Australia, Britain, New Zealand, the United States and China.

Australia

Australia is aggressively marketing its language training capabilities in Hong Kong. Unlike Canada and the United States, Australia is pursuing a "revenue generating" approach, and treats higher education as an industry. Education is the fourth largest trade sector in Australia, generating \$4.4 billion in revenues between January and September 2004.

The Australian language industry is represented in Hong Kong by IDP Education Australia Limited (IDP), an independent not-for-profit organization which is equivalent to the CECN. Through this network, IDP provides access to Australia's education and development services, its expertise and other capabilities. IDP is owned by 38

universities in Australia and represents all education segments. For students interested in studying in Australia, IDP provides information on more than 1000 Australian institutions, including universities, vocational education and training institutes, English language colleges and schools. According to IDP, approximately 15 000 Hong Kong students studied in Australia in 2003.

IDP helps international students enroll in Australian educational institutions, supports the use of Australian education expertise internationally and assists Australian education systems abroad. IDP also manages a portfolio of projects in partnership with education institutions, corporations, governments and agencies such as AusAID, the World Bank and the Asian Development Bank.

IDP's services include student counseling, application processing, including an on-line application service (IDP Global Apply Online), visa application processing, producing student publications and Web sites in various languages, sponsoring Australian education exhibitions and promotions, and administering fellowships and scholarships.

IDP also publishes SWaP, an exciting, upbeat magazine aimed at prospective international students. SWaP magazines and webzines are tailored to specific country markets, and translated into the local languages. In Hong Kong, SWaP is published in Chinese (traditional script).

The market is dominated by universities and colleges accredited by the Hong Kong Council for Academic Accreditation (HKCAA) and accepted as course providers for the Continuing Education Fund and Teacher Education Training. There is one Australian International School in Hong Kong catering to the needs of Australian expatriates.

The English Schools Foundation (ESF) has just completed an English in the Mainstream training program delivered by the Department of Education of South Australia to the combined staff of the 17 ESF schools.

The University of Melbourne has partnered with the Hong Kong Institute of Education to assess and report on the effectiveness of the Primary Native English Teacher (PNET) program.

Australia continues to be a favourite among agencies recruiting students to study abroad. Australia is perceived as having a very flexible system with more paths to a university education than other countries.

Australia is also seen by the Hong Kong community to be very welcoming; students are encouraged to study in Australia. Legislation such as the Education Services to Overseas Students Act introduced in 2000 offers assurance that foreign students in Australia will be well cared for. The Australian Consulate has staff dedicated to assisting Australian education providers, students and parents to streamline the process of applying to study in Australia.

The Cheung Kong Group, a major business group, and the Australian government launched the Australian Endeavour Cheung Kong Scholarship Program in 2004

whereby each party will match \$3.9 million in funding over three years to provide education exchange opportunities to 420 Asian and Australian students.

New Zealand

New Zealand recognizes the trade potential of student recruitment and is pursuing opportunities for the language market abroad. Revenues generated by New Zealand's foreign student exchange segment exceeded \$1.8 billion during the 2003/04 school year. New Zealand's Ministry of Education, New Zealand Trade and Enterprise, New Zealand Foreign Affairs and Trade, and Education New Zealand are co-operating on a two-pronged strategy to promote "education as trade": 1.) students studying in New Zealand and 2.) offshore education i.e. exporting education services.

The Ministry of Education has enacted legislation to regulate language training in New Zealand industry. The New Zealand Ministry of Education Code of Practice for the Pastoral Care of International Students covers all aspects of the international student's experiences in New Zealand, from recruitment to programs and home stay in New Zealand. The Ministry has also established the International Education Appeal Authority to ensure that standards are maintained and to adjudicate complaints.

Institutions wishing to enroll international students must be a signatory to the Code of Practice. Access to government funding is therefore contingent on institutions becoming signatories to the Code.

The New Zealand Trade and Enterprise (NZTE) Exporter Education Program was created to increase the international competitiveness, profitability and capability of New Zealand's businesses and individual entrepreneurs. The program encourages education providers in New Zealand to consider education as an export commodity, and to this end offers market advice to the education sector. NZTE projects that by 2025 international education will generate \$5.8 billion in annual foreign student exchange revenue.

New Zealand Focus, which opened in September 2005, is a New Zealand-branded retail and information centre located on one of Hong Kong's busiest thoroughfares. Established by New Zealand Trade and Enterprise, it is the first New Zealand Focus concept store. Although established to promote a variety of New Zealand retail and trade interests, the centre also includes a special information zone dedicated to New Zealand education which is operated by Education New Zealand.

To promote New Zealand's language industry, Education New Zealand organizes a major education fair in Hong Kong to coincide with the release of the HKCEE results in August. It also organizes country-specific conferences for agents in New Zealand. The October 2005 edition of its popular conference for Hong Kong agents was over subscribed.

New Zealand universities are increasing their presence in Hong Kong. The University of Otago has begun an English language training program for Hong Kong teachers of English, Victoria University launched its first offshore International Master's of Business

Administration Program in Hong Kong, and the University of Auckland is supporting alumni associations in Hong Kong.

United Kingdom

The British Council has been promoting British education in Hong Kong since 1948. It is, however, regarded more as a community organization than a study abroad group associated with the British government. Located next to the British Consulate General, the staff of 200 provides services to 8000 members of the community who visit their offices in person and to an additional 40 000 on-line visitors. In addition to acting on behalf of British educational institutions, the Council organizes a range of work directly relevant to the Education and Manpower Bureau (EMB). The Council expects these efforts to contribute to the overall improvement in the standard of English in Hong Kong, as well as to the dialogue between policy makers and educational practitioners in both the United Kingdom and Hong Kong.

The British Council has accessed most of the funding opportunities offered by the Hong Kong government. Included in its activities are teacher training, continuing education, language testing, and offering reimbursable courses under the Workplace English Scheme. The Council acts as a language centre and as such offers language programs to students of all ages, TESOL training and also provides a Distance Learning Study Centre, which is a dedicated area for registered e-learners. The British Council recruits English teachers locally with specific teaching qualifications and experience for various courses aimed at non-English speaking students.

Chinese students studying in the United Kingdom contribute \$1.1 billion to the British economy.

In November 2004, the British Department for Education and Skills released *Putting the World into World-class Education - An International Strategy for Education, Skills and Children's Services*. Among the strategies mentioned in the report is the twinning of British schools with foreign schools. Hong Kong is among 30 countries that have agreed to participate in the twinning program. Funding is available for each of the schools involved, both British and foreign.

IELTS has a virtual monopoly with respect to English proficiency testing as a result of its adoption by Hong Kong universities and the Hong Kong civil service.

United States

The United States offers a range of study abroad programs, including one-year exchange programs with public schools. The Institute of International Education, a U.S. study abroad centre, provides information about U.S. schools to Hong Kong students. In 2004, 7100 students from Hong Kong studied in the United States, a 2.4% decline from 2003. Hong Kong ranks 15th as a source of international students studying in the United States.

A U.S. degree is considered prestigious by students from Hong Kong, and U.S. education fairs held in Hong Kong are always well attended. Agents sometimes seek out U.S. schools in the belief that doing so will add to an agency's reputation.

High-profile, comprehensive U.S. language centres dominate the Hong Kong market. These include the Wall Street Institute, the Princeton Review and the Kaplan Educational Center. Nevertheless, the reputations of the various secondary schools offering U.S. curricula in Hong Kong can vary widely.

U.S. students studying in Hong Kong are eligible for financial assistance in the form of Freeman Awards for Study in Asia while students coming from Hong Kong to the United States are eligible for Fullbright scholarships. A number of other scholarships originating in Hong Kong are also available for Hong Kong students in the United States. Several U.S. universities offer programs in Hong Kong universities e.g. Hong Kong University's American studies program.

Some Canadian universities and colleges rely on the U.S. TOEFL for admission purposes as well as the British/Australian IELTS. The Test of English for International Communication (TOEIC) is listed a benchmark test for the Workplace English program. Students wishing to apply to many U.S. institutions must write the SSAT or SAT examinations. The International Institute of Education proctors the SSAT examinations in Hong Kong.

China

Chinese universities have been sending representatives to Hong Kong to recruit students since 2002. Since then, interest in studying in Chinese in China has been building as more Hong Kong students view fluency in Chinese as an important business tool for the future. The entrance of China as an education destination is affecting the "study abroad in English" market by increasing competition for students. China's proximity to Hong Kong gives it a competitive advantage over Canada; more students are choosing to study Putonghua rather than English.

A study sponsored by the Trade Development Council in Hong Kong and conducted by the Hong Kong Institute for Educational Research (Chinese University) will assess the commercial and export potential of Hong Kong's education services. The study will focus on the Chinese mainland as a primary market and higher education as the main exportable service. The study will explore the potential for establishing schools or offering educational courses/programs in markets outside Hong Kong or enrolling non-resident students in Hong Kong's educational institutions and universities.

Others

Singapore and to a lesser extent France, Germany, Switzerland and the Netherlands are adding to the competitive mix in the region's language market. Singapore's aggressive marketing strategies in Asia have produced results as more Hong Kong students are choosing Singapore's institutions and are electing to study in Singapore, which is viewed as less expensive than some alternatives. Switzerland receives

students mainly in the tourism and hotel management industries. The Netherlands has added two education officers to its Consulate in Hong Kong.

Canadian Position

Known for providing high-quality education at affordable prices, and for its multiculturalism, tolerance and national security, Canada has become one of the top five destinations for the study abroad market. The Canadian share of Hong Kong's study abroad market is worth about \$500 million. Canada's environmental track record and its natural beauty also give Canadian educational institutions a competitive edge. As well, written Canadian English more closely resembles Hong Kong English and Hong Kong people find the relatively neutral Canadian "accent" to be the easiest to understand. For many residents, having a family or business connection in Canada encourages them to consider Canada as an education destination.

Studying in Britain, the United States and Australia is considered more expensive while studying in New Zealand appears to cost less, on average, than in Canada.

Hong Kong students of all ages choose to study in Canada. Typically, most arrive after writing their Hong Kong Certificate of Education Examination (HKCEE) i.e. from form five. This is because students who perform reasonably well on their HKCEE know that in Canada they will be eligible to enter university after grade twelve whereas staying in Hong Kong would entail attending secondary schooling for an additional two years.

There are 100 000 Canadian university alumni and 25 active alumni associations in Hong Kong. Over 250 000 Canadian citizens reside in Hong Kong, which represents a significant foreign presence. According to the Consulate General of Canada in Hong Kong, there are more Canadian passport holders than most other nationalities in Hong Kong. The Canadian Chamber of Commerce in Hong Kong is the largest Canadian business association outside Canada, and one of the largest and most influential business groups in the Asia-Pacific region.

Canada's major Hong Kong language markets are in the education and study abroad segments e.g. Canadian schools, Canadian NET, International Schools, and study abroad programs. A number of Canadian universities have agreements with Hong Kong institutions, particularly in research, but there are few in the language field.

Three schools (Canadian International School, Delia School of Canada and Phoenix International School) offer the Ontario Secondary School Diploma while P.C. Lau Memorial Christian Alliance International School offers the Saskatchewan Secondary School Diploma. Canadian International School and Delia School of Canada are located on Hong Kong Island. Delia has started a kindergarten program in Kowloon. Christian Alliance is located in East Kowloon. Phoenix School will be changing to the IB curriculum in 2007.

Phoenix International School, Delia School of Canada and the Toronto Board of Education have taken the initiative to organize Ontario credit courses in Hong Kong during the summer.

Three private Canadian secondary schools maintain offices in Hong Kong: Bond International College (Toronto, Ontario); Bronte College (Oakville, Ontario); and Columbia International College (Hamilton, Ontario).

Non-local tertiary institutions offering courses in Hong Kong must be accredited by the Hong Kong Council for Academic Accreditation (HKCAA). Ten Canadian colleges and universities have received local accreditation to date. Some have registered a business in Hong Kong and have received a business registration number. Most have made agreements either with educational institutions or with agencies offering other educational programs. The University of British Columbia maintains a full-time office in Hong Kong.

Canadian participation in the NET scheme represents 20% of the total number of teachers and a \$13.9-million share of the NET budget of the EMB. The cost of the NET scheme works out to an average of \$92 000 per teacher. The approximately 400 Canadians teaching in International Schools represents an additional \$36.6 million.

The Canadian University Association (HK) Ltd. fosters networking opportunities for returning Canadian graduates. It actively participates in community development projects and provides information to Hong Kong students who wish to continue their studies in Canadian universities.

Competitive Advantage through Canadian Initiatives

Citizenship and Immigration Canada provides quarterly data through their on-line newsletter *Monitor* which includes statistical data and information about Canada's current status with respect to international students and trends in citizenship and immigration.

The following organizations would make excellent points of contact for new entrants to the Hong Kong language market.

Consulate General of Canada in Hong Kong—Trade Section

The Consulate General of Canada assigns a trade officer to the education sector as part of a broader trade portfolio. The trade section does not specifically support the language segment with a direct, public presence but nevertheless would be a useful contact for those exploring the overall Hong Kong market.

Canadian Education Centre Network

The CECN established a presence in Hong Kong in 1995. Partially funded by the Canadian government, the CECN is now self-financing, receiving most of its funds from annual membership fees from client schools. In Hong Kong, the CECN advises students wishing to study in Canada, distributes member schools' promotional brochures, advertises and provides logistical support to its members wishing to conduct school seminars at its office in Hong Kong or otherwise explore the language market. CECN's

Canadian-specific education fairs are held each October (open to all schools) and March (for secondary schools) and provide a Canadian focus to the study abroad market. Secondary schools can take advantage of the "late applicant" program in August when students applying at the last minute will be directed to schools that provide that service.

The CECN maintains a research department in Vancouver. Member institutions can access the research database and receive current market analysis on their region of focus. Schools wishing to use this service must belong to the CECN.

The CECN lists selected agencies that promote Canadian education on its Web site i.e. not all agencies that work with Canadian institutions are listed. Interested non-member schools may approach the CECN in Hong Kong and purchase relevant services.

Canadian Chamber of Commerce in Hong Kong

The membership of the Canadian Chamber of Commerce in Hong Kong includes a number of education sector participants as well as a very active education committee. The Distinguished Speaker Series has featured a number of Canadian educators, including Dr. Michael Fullan, Dean Emeritus, Ontario Institute for Studies in Education, Dr. Paul Davenport, President, University of Western Ontario, and Kim Gordon, Head of School, Bishop Strachan School, Toronto.

Chinese Canadian Association (HK) Ltd.

The association promotes co-operation between Hong Kong and Canadian communities, and addresses the concerns of Chinese Canadians in Hong Kong. Primarily a social organization, the association conducts fundraising, provides scholarships and sits on the board of the Canadian International School. Connecting with this organization could yield valuable contacts in Hong Kong.

On-line Learning

Univeristas 21 Global, an on-line graduate school, names Hong Kong as one of its world wide centres. The school is a joint-venture between 17 universities from around the world (including UBC and McGill University) and Thompson Learning. The school's mission is to deliver world-class education in a flexible and cost-effective manner to working adults. By leveraging the power of the Internet, the school connects students to a global learning community of faculty and fellow students, resulting in a rich, stimulating and interactive educational experience.

Hong Kong Economic and Trade Office (HKETO)

The HKETO offices in Canada can be an invaluable source of assistance and information for providers engaged in intelligence gathering or due diligence assessment of opportunities in Hong Kong. HKETO in Canada and the Canadian Association of Journalists co-sponsor scholarships for Canadian journalism students to spend time in Hong Kong to learn about the region as part of their studies.

PRIVATE-SECTOR CUSTOMERS

The three largest language areas in the private domain are 1.) study abroad opportunities, 2.) education sector language training, and 3.) language training for the business/labour sector. Hong Kong is also experiencing an increase in demand for spaces in private nurseries, pre-schools, International Schools, language centres, corporate training centres, language testing centres, and continuing education and workplace English programs.

PUBLIC-SECTOR CUSTOMERS

Hong Kong's publicly funded educational institutions at all levels are seeking a range of services, including locally delivered language programming, NETs, language tests and test preparation.

MARKET LOGISTICS

Study Abroad Agencies

Agencies sign contracts with overseas educational institutions and recommend those with which they have formal agreements. Agencies expect a fee or commission from most institutions for each student recruited. Only at the university level might an agency recommend a student without expecting a commission. Some agencies charge students or parents a fee for assisting in completing a visa and/or study permit application for Canada.

A survey of Hong Kong agents revealed that quality and service were the two major factors influencing an agency's decision to maintain a relationship with an overseas institution. Service was gauged by the numbers of complaints from parents or students after student arrival, the degree to which parents and agents were kept informed of student progress, the extent of regular school-parent-agent contact, and the response time for solutions to problems.

The survey also revealed that an agent's willingness to promote a country as an education destination rested largely with their experiences with the immigration sections of the consulates issuing study permits and visas.

Larger agencies have staff dedicated to country-specific recruitment. In addition to assisting with general placement, these staff will handle their own portfolios of student/clients for which they are responsible.

Most agencies provide follow-up service to students they have originally recruited. Language institutes working with an agent should be aware that parents and students assume that agencies will provide on-going support to the student, even after initial

enrollment. Although services typically include assistance with obtaining a visa, and/or study permit, agencies rarely provide such services to Canadian passport holders. Many Canadian students who have lived in Hong Kong most of their lives nevertheless need help applying to an appropriate school. In such cases, students should request assistance from their school guidance counselors and the Canadian Education Centre Network (CECN).

Market-entry Considerations

Hong Kong has joined the first free trade agreement with the Chinese Mainland through the Closer Economic Partnership Agreement (CEPA) with Macau and Guangdong Province. This agreement is expanding Hong Kong's links with the Pearl River Delta (PRD) region, and furthering its position as the economic gateway to China.

The next free trade agreement—the “9 + 2”—will involve nine Mainland provinces plus Hong Kong and Macau, a relationship that could open up southern China to the world. The upcoming Pan-Pearl River Delta (Pan PRD) Regional Cooperation and Development Forum is comparable to the European Community in that it is a common market encompassing a large population, in this case 460 million people. Hong Kong is already the biggest investor, the fundraiser of choice and the business service centre for the Greater PRD population of 50 million; the opportunities in the Pan-PRD market are, at this point, incalculable.

There are 3800 overseas companies with offices in Hong Kong and over 7500 in the Pan PRD region. Opening up to the world means doing business in English. Language industry investors establishing themselves in this market now will be at the forefront of a market with boundless potential.

The following advice is aimed at market entrants seeking long-term opportunities:

- Hong Kong is an expensive city in which to maintain a presence; therefore, it is important to carefully analyze the market segment of interest and be prepared to support start-up costs. Legislation and possible start-up funding to support business activities should be investigated thoroughly. Invest Hong Kong has expertise and funding available for market analysis and initial set up.
- Hong Kong's strengths include the rule of law supported by an independent judiciary; the free flow of information; an efficient civil service; a world-class communications network; comparatively simple tax regime with low rates; no foreign exchange controls or trade barriers; and the world's freest economy.
- The Pan PRD region is projected to grow into a powerful, integrated regional economy, with Hong Kong at the centre.

Hong Kong offers certain financial incentives to Canadian providers to encourage them to set up locally, and Canadians constitute the second largest expatriate community in Hong Kong. Nevertheless, despite these positive aspects, certain factors could

negatively influence the “study in Canada” market segment (the most relevant area of language training for Canadians) in the short-term:

- Declining birthrate in Hong Kong—already one of the lowest in the world—reduces the potential pool of students studying abroad.
- Many students without a Canadian connection consider Canada too distant.
- A strong Canadian dollar increases the perception that studying in Canada is expensive.
- Obtaining a Chinese education at the finest Chinese universities is regarded as a valuable investment for the future.
- Comparatively long wait times to obtain Canadian study permits and visas have become an issue.
- Agents often choose to promote other countries rather than Canada because of misconceptions about Canadian language training policy and practice in Hong Kong.
- Hong Kong is looking to the potential pool of students in mainland China to make use of its institutions and to contribute to its economy. Chinese students consider Hong Kong a potential gateway to Canada.
- The introduction of associate degrees and diploma programs, in conjunction with incentives for non-local providers to develop a presence in Hong Kong, suggests more students could choose to study in Hong Kong in the future. Hong Kong universities and other local providers are also developing programs to meet some of the demand for language training. Students will continue to value a Canadian education, provided they can study in Hong Kong.
- Marketing by competitors is aggressive, particularly by the United Kingdom, Australia and New Zealand. Australia presents many attractive options to students.
- Lack of brand recognition e.g. in testing could act as a barrier.
- Language-related legislation is complex; significant time is needed to determine requirements and establish compliance.

Suggested Business Practices

The Hong Kong government will provide funding and set up assistance for language providers interested in accessing the local market. Dedicated staff at Invest Hong Kong can help non-local providers establish themselves. Establishing a presence in Hong Kong first helps providers gain an understanding of the culture and potential in China before setting out to explore opportunities in the mainland.

It is also worth noting that the Chinese government is aggressively promoting greater regional consolidation. Hong Kong and Macau are on either side of the entrance to the Pearl River flowing from Guangdong Province into the South China Sea. Language providers looking to future opportunities are advised to consider the Pearl River Delta area as a potential market.

Local Standards, Certificates or Regulations

Any program, no matter the educational focus, must receive government approval. This includes language centres, play groups, after-school music, art, or IT classes, indeed any program in which teaching takes place.

Strict criteria are in place for establishing formal education sections, including teacher certification, curricula and school facilities. Several government ordinances govern their establishment and operation.

Approvals are required from the Education and Manpower Bureau (EMB), and the Fire Services, Building Services, and Health Services departments. Special criteria have been established for nursery and kindergarten programs. In these cases, teachers and principals must register with the EMB. These rules were relaxed somewhat in 2004 for teachers, principals and non-local curricula; nevertheless, anyone wishing to establish a program is still required to consult with the EMB and seek the necessary approvals.

MARKET OVERVIEW—MACAU

Background

Macau was officially settled by the Portuguese in 1557 during an era of exploration initiated by Prince Henry (“the Navigator”) which consolidated Portuguese trading centres in the area. Macau held a virtual monopoly on trade between China and Japan and between both nations and Europe for many years. In 1841, the British settled in Hong Kong, about 70 km from the Macau border. Trade shifted away from Macau as more ships were attracted to Hong Kong's deep-water harbour. Macau's economic status declined further as Hong Kong developed into one of the world's major commercial centres. Macau continued to be a Portuguese colony until it was handed back to China on December 1999. Macau received the same conditions as Hong Kong in that it has become a Special Administrative Region with a guarantee that it can function as it has in the past for another fifty years.

Macau's population of 460 000 people comprises 95% ethnic Chinese with the balance being Portuguese, Macanese (mixed Chinese and Portuguese) and a few other nationalities. Macau's economy is based largely on tourism, including gambling, as well as fireworks, and textile and garment manufacturing.

Chinese (Guangdonghua) and Portuguese are the two official languages. Portuguese has historically been the language of instruction in Macau's schools although Chinese has become the medium of instruction in most schools, with Portuguese as the second language. Most Macanese now speak Guangdonghua at home. Although Portuguese has been the language of the Macau government for 400 years, official documents are now prepared in both Chinese and Portuguese, with a few being published in English for convenience. The court system still adheres to the Portuguese legal code and students at university must read law in Portuguese.

English is widely understood in hotels, tourist areas and in the retail sector. The majority of tourists come from mainland China or Hong Kong, including the clientele at Macau's casinos. Most Western tourists come to Macau as an extension of their visit to Hong Kong. In a recent survey of the gaming industry, 88.8% of the job postings required Putonghua fluency while only 54.5% required English.

Language Education—Primary and Secondary

Understanding Macau's education system is crucial to identifying opportunities for the language training industry.

Macau's education sector is the responsibility of the Education and Youth Affairs Bureau (Direccao Dos Servicos De Educacao E Juventude [DSEJ]). Macau's education system comprises 20 government schools, 111 private schools and 12 tertiary institutions, a combination of local and International Schools. In an effort to standardize education, the Macanese government has developed a universal basic education framework. Joining Macau's basic education network qualifies schools offering kindergarten through grade 12 to receive government funding. Funding includes

stipends for teachers and for students entering grade 10. Eighty-eight private schools have joined so far.

Private schools are typically established by the church, mostly Roman Catholic, and operate for the most part in Chinese. The Lutheran Synod from Missouri has set up a language centre and the Anglican Church operates an English medium kindergarten. A number of secular organizations have also organized schools with Chinese as the medium of instruction.

Schools in Macau are either government-run schools, private schools that belong to the Macau basic education network or independent private schools. Most local schools adhere to an instructional model that is similar to Canada's i.e. kindergarten followed by twelve years of public school. In practice, the system is usually divided into six years of primary, three years of middle and three years of secondary school. Other schools have adopted the Chinese model i.e. six years of primary and six years of secondary while others, mainly English medium schools, have adopted the Hong Kong model which features seven years of secondary school.

Chinese is the medium of instruction in Macau's private schools, with Guangdonghua used in up to 70% of classrooms and Putonghua used in the others. Five schools provide education in Portuguese. There are 13 schools that use English as a medium of instruction, including local schools, which offer an English section and a Chinese section, and four International Schools. There are very few pre-primary schools offering courses with English as the medium of instruction; St. Anthony's English Kindergarten is an exception. English is used in the secondary sections of seven local schools. Many of these schools also devote instructional time to teaching Putonghua.

Four International Schools in Macau use English as the medium of instruction. The School of Nations, one of the oldest, is a "through train" i.e. from kindergarten to secondary school. Sheng Kung Lai Primary School, also one Macau's original schools, is run by the Anglican diocese of Hong Kong. Both schools base their instruction on the British curriculum. Two others have a Canadian connection. Despite its name, the Canadian College of Macau is not connected in any way to Canada.

Macau's newest school is The International School (TIS) of Macau. Co-founded by the principal of the Canadian International School in Hong Kong, TIS is about to build a permanent facility at the Macau University of Science and Technology. Currently offering programs up to grade 9, TIS will be offering the Alberta Secondary School Diploma to students completing Grade 12. TIS has been working with a group of francophone parents in Macau to introduce a program that will use French as the medium of instruction.

Current student enrolment (non-tertiary) in Macau comprises 95 075 students: 10 441 in pre-primary, 35 652 in primary, 48 364 in secondary and 618 in special programs.

The number of school leavers reached its highest level in seven years during the 2003/04 academic year: 4900 left before finishing secondary school. Good employment

prospects in the gaming industry has been cited as the reason for the high attrition; approximately one third of school leavers find jobs in that industry.

Language Education—Tertiary

Tertiary institutions are the responsibility of the Tertiary Education Services Office (Gabinete de Apoio ao Ensino Superior [GAES]), a government department under the leadership of the Secretary for Social Affairs and Culture of the Government of Macau.

Macau has almost as many post-secondary institutions as Hong Kong. Of the ten institutes for higher learning and two research institutes, only three—the University of Macau (UM), Macau Polytechnic University and Macau University of Science and Technology—can be considered full-fledged universities. The others specialize in specific studies such as tourism, information technology, policing and nursing. The Inter University Institute has begun offering post-graduate degrees specializing in education.

Universities in Macau are beginning to emphasize the importance of English language skills to their students. The University of Macau (UM), which is positioning itself as an international university, offers many classes with English as the medium of instruction. UM has established The English Language Center (ELC), an off-campus independent teaching unit which helps prepare students in Macau for the international job market by improving their command of English. The university has also developed a pre-university course, which includes intensive English, to prepare secondary school students for university. UM's Faculty of Education provides both pre-service and in-service programs for teachers which include teaching English in primary and secondary schools.

Macau Polytechnic University has partnered with the Bell Educational Trust in Cambridge, U.K. to create the MPI - Bell Centre for English, which is located at the university. The Centre provides high quality EDL training including custom design training for educators and corporate staff. Its School of Languages and Translation has degree programs in Chinese - English and Chinese - Portuguese translation. In 2001, MPU started sponsoring a Macau-wide English speech contest which includes primary through university levels.

The Macau University of Science and Technology has an agreement with the University of Southern Queensland (USQ) in Australia to provide four-week intensive training programs at USQ. The pre-university program includes an intensive English component designed to improve the language skills of secondary school students before they enter the university.

The Asia International Open University is dedicated to offering distance education and has signed an agreement with the British Columbia Open University (now affiliated with Thompson River University) to offer degrees with Canadian credentials.

Non-local providers wishing to conduct courses in Macau must apply to the Tertiary Education Office for permission and registration.

Language Centres

Five formal English language centres and several tutorial centres offer services in Macau. Focus International Student Service Centre, Concordia Language Center, International Education Centre, Jingdou Language Centre and the International English Language and Training Centre offer a variety of programs for all age groups. While most provide English proficiency skill training, Focus International also provides test preparation for IELTS and TOEFL.

Translation

The government remains focused on Chinese-Portuguese translation. The Portuguese and Chinese translations of documents are official; translation into English is performed as needed.

Macau's economy is not tied to translation services to the same extent as Hong Kong's. This is because Macau's limited manufacturing base precludes the need for the type of translation services offered in Hong Kong. Many Guangdong manufacturing industries are headquartered in Hong Kong and decisions about translation are made there and outsourced there. Major hotels, through their business centres, can either provide or arrange for translation and interpreter services to be provided to visitors.

Macau Polytechnic University offers a degree program through its School of Languages and Translation—both Chinese - English and Chinese - Portuguese. The World Trade Centre provides translation services to its members and Next Vector Consultants also provides a variety of services in this area.

Key Factors Shaping Market Growth

Macau differs from Hong Kong in many ways, especially in terms of the impact its economic progress has had on the language training industry. As an economic force in Asia, Macau has had little need to focus on English.

The government intends to amend the Higher Education Law to offer associate degree programs in addition to full degree programs. The GAES Web site provides links to other jurisdictions, including links to Ontario and British Columbia education ministries.

As with Hong Kong, the status of language and its importance to Macau is reflected in its education policies. Macau is just now beginning to address education sector reforms. The government has begun to standardize the secondary school system, and will complete an assessment of tertiary education by 2007. The government is also committed to providing publicly funded education for the last year of kindergarten, and extending publicly funded education into the senior secondary level. The government has made no provision for improving standards for English in Macau's schools, and therefore no funding schemes that specifically address English language education have been put forward.

Although the Macau government has not progressed as far as Hong Kong in reforming its education system, it has, however, recently announced several initiatives that will have an impact on education:

- The Centre for Quality of Life Studies (Centro de Estudos para a Qualidade de Vida [CEQV]), a ‘think tank’ headed by the Chair of the Council for the University of Macau, will be involved in various activities in co-operation with local and foreign consultants. The focus will be on employment, academic qualifications, professional skills, remuneration and working conditions, education, health and medical care, social security and social assistance, public safety, quality of living and the environment, as well as the participation of the citizens in cultural, leisure and civic activities. So far, the CEQV has held nine consultations focused on education and academic qualifications.
- Legislation has been proposed to institutionalize Macau’s secondary education sector. The intent of the bill is to standardize the three-year secondary program (grades 10 to 12). While many schools do offer a diploma at the end of grade 12, some offer an extra year similar to the British model.
- An amendment of the law on higher education has been proposed. Under the amendment, a system will be introduced to assess the operation, instruction and research quality of higher education institutions. A monitoring mechanism will be proposed and self-management will be encouraged. Degree courses will be standardized, and tertiary institutions will be permitted to offer associate degree courses and to accept gifted students who have not completed grade 12.

The Education and Youth Bureau has received support from the Macau Foundation to carry out a program to provide computer facilities to all schools in Macau. The focus is on upgrading hardware and installing software in schools which belong to the basic education network.

Schoolteam, a Hong Kong education service provider, has teamed with a Macau telecommunications operator Companhia de Telecomunicacoes de Macau (SARL) to provide OpenBook AnyWhere, a program designed for non-native English speakers.

Opportunities

In Macau

Macau is an emerging market for language providers; there are few players and hence little competition. Workplace language training should focus on the gaming and tourism industries. The combination of limited access to spaces in International Schools and the growing expatriate population suggests that more International Schools would be welcomed. European and Australian universities are just beginning to explore partnerships. Canadian programs offered in Macau would attract both Macanese students and students from mainland China.

In the absence of official government support for English language training, Macau’s universities have themselves taken up the challenge to support English language

learning. Led by the University of Macau, each of the major institutions is providing courses to improve the standard of English.

Language providers should also consider the following potential opportunities:

- Larger market: The Macau market should be seen in the context of the Pearl River Delta i.e. opportunities for the language industry over a much wider area.
- Lack of competition: There is currently little competition.
- University partnerships: The major Macau universities are just beginning to partner with foreign institutions although there are few partnerships with Canada.
- Language and the gaming industry: The gaming industry is trying to tap into the overseas market by attracting Westerners to Macau. It is just beginning to focus on the need for English language training to enhance the pool of linguistically skilled local employees and has accordingly begun setting up in-house training programs. Interested non-local providers with experience in providing English training to the tourism and gaming industries may wish to investigate further.
- International Schools: With only two “through train” International Schools offering a secondary level, and in light of burgeoning growth in the gaming industry, additional International Schools will be needed.
- Business costs: The cost of doing business in Macau is much lower than in Hong Kong.

In Canada

Student Recruitment

The opportunities for the Canadian language industry to attract business from Macau to Canada are similar to those in Hong Kong in three areas, albeit on a smaller scale. The Macanese government does not provide the same funding incentives for language training as the Hong Kong government.

Most opportunities lie in “study abroad” and the provision of English language support to students in Macau. Secondary schooling ends after completion of grade 12 and many students attending sections with English as the medium of instruction intend to study abroad. There is no territory-wide examination and students begin early to investigate further study in foundation courses in secondary schools or language centres in post-secondary institutions.

Teacher Training

English teachers in Macau are receptive to language upgrading or in-service training and would welcome opportunities to study in Canada. Individual schools provide financial support. The International School of Macau reports that a few teachers are

applying to become teacher aides to both improve their English and learn Western methodology on the job. While interest exists on the part of the teachers, there is no systemic government support at this time.

University Partnership

Partnering with Macau institutions of higher learning will be welcomed. Canadian institutions that are located in areas of Canada where the gaming industry has a significant presence might also consider partnering with Macau's Institute for Tourism and the gaming industry itself.

COMPETITIVE ENVIRONMENT

International Competition

There is very little direct international involvement in Macau; most countries maintain their on-the-ground presence in Hong Kong. Universities in Macau have begun to partner with foreign institutions. The University of Milan has signed an agreement with Macau Polytechnic University. The University of Macau has developed a Centre for European Studies. The three major universities are exploring partnerships with Australian universities.

Portugal maintains the largest non-local presence and offers scholarships to study in Portuguese in Portugal. The British Council is exploring opportunities to work with Macau University to offer IELTS training. The U.S. presence is limited to Concordia English Language Center established by the Missouri Synod of the Lutheran Church. Chinese universities have not taken the same interest in attracting Macanese students as they have in attracting students from Hong Kong. Beyond that, there is very little competition.

Canadian Position

Canada and Portugal are the only nations with an official or semi-official presence in Macau. Most Macanese, however, travel to Hong Kong to access Canadian services and information. They travel to visit the Consulate General of Canada in Hong Kong, the Canadian Education Centre Network, the Canadian University Alumni Associations and to interact with the Canadian business community. Large scale education fairs and seminars are mostly held in Hong Kong although language providers may also consider exhibiting at future editions of IT Week held in Macau.

Operating from kindergarten to grade nine at present, The International School (TIS) will soon enter into an agreement with Alberta Learning to offer the Alberta Secondary School Diploma at the end of grade 12. TIS has also partnered with the French speaking community and began offering classes using French as the medium of instruction in 2005.

Established by the Canadian Education Foundation in 1988, the Canadian College of Macau is registered with the Education and Youth Services Bureau to offer courses to students in grades 10 to 12. No longer formally connected to Canada, the College has developed its own curriculum and offers its own diploma. About 25% of its students apply to study overseas and depend on study abroad agencies to help them with their applications to universities and visa processing.

Focus International Overseas Student Service is a Canadian-owned study abroad agency with one department dedicated to study abroad in Canada.

While not located in Macau, two associations in Canada could be helpful to language providers interested in the Macau market. The Macau Cultural Association of Western Canada (Casa de Macao em Vancouver) and Casa de Macao no Canada (Toronto) facilitate Canada - Macau relationships.

Competitive Advantage through Canadian Initiatives

The Canadian Chamber of Commerce in Macau opened in 2005. Many of its members maintain offices in Hong Kong and either have, or would like to develop, links with Macau. The Chamber is a good starting place for language providers interested in accessing the Macau market. Canada is the only country with a Chamber of Commerce located in Macau.

MARKET LOGISTICS

Market-entry Considerations

Six study abroad agencies in Macau assist students who choose to continue their studies overseas. Students holding a Macau S.A.R. passport require a visa and a study permit before arriving in Canada. Students holding a Portuguese passport only require a study permit.

Canadian language training suppliers should note that local Macau schools have traditionally organized a summer school each year. While not always compulsory, students feel obliged to attend and will therefore not be available to learn English abroad during the summer.

A number of factors are responsible for Macau being overlooked by non-local language providers:

- Time: Providers have typically found it expedient to start in Hong Kong and then proceed directly to mainland China.
- Market intelligence: Macau and Canada have not established a long-standing relationship. Macau is not generally well-known and is therefore often overlooked.

- Population: Macau is relatively unpopulated and hence a small market.
- Birthrate: Macau's birthrate is one of the lowest in Asia, almost as low as Hong Kong's.
- Government support: Little public-sector support exists for the language industry.
- Administrative complexity: The processing of business applications by the Macau government is lengthy.
- Access to Hong Kong: Most language providers, indeed the Macanese themselves, are resigned to traveling to access services.

Suggested Business Practices

Many English medium and International Schools hold school seminars at which time they recruit students directly. Students may also contact guidance counselors whose assistance can be invaluable.

More well-established schools have opened alumni offices, hold alumni dinners when the president, principal or head of a school visits, and a few have even hosted special convocations for Hong Kong graduates.

It is worth noting that many students from mainland China, particularly those with one parent working in Hong Kong, also turn to agents for help. Applicants from the mainland are interested in learning about the differences in the Canadian educational system as well as useful hints about obtaining study permits and visa applications to study in Canada.

PROMOTIONAL EVENTS

Hong Kong

While education fairs occur throughout the year in Hong Kong, the most popular are held between the beginning of June and mid-August. Fairs are held every weekend with some in August also held on weekdays. Country-specific fairs featuring Australian, U.S., or British schools are particularly well attended. All of the major agencies exhibit at fairs during this time and several Canadian secondary schools take advantage of agency fairs to recruit students.

International Education Service

International Education Service (IES) is the only study abroad agency in Hong Kong that organizes an annual country-specific fair featuring Canadian schools. Usually organized just after Chinese New Year, this fair attracts a large number of Canadian schools, mainly from British Columbia.

Institute of International Education

The Institute of International Education (IIE), the U.S. counterpart to the CECN, organizes a North American Boarding School Fair each November for Canadian and U.S. boarding schools wishing to recruit students from Hong Kong. This fair may be of interest to Canadian providers.

Education and Career Expo

The largest fair in Hong Kong, the Education and Career Expo, takes place in February each year at the Hong Kong Convention Centre.

Macau

Education fairs and seminars are seldom held in Macau, therefore agencies will have few opportunities to meet with school representatives in Macau as most go to Hong Kong.

For this reason, many students wishing to study abroad will attend education fairs in Hong Kong where they will engage Hong Kong overseas study agencies to assist them with their applications and study permits.

In September 2005, several Macau government departments, educational institutions, and academic and business organizations co-organized IT Week, the second edition of a large-scale exhibition to showcase the IT industry.

KEY CONTACTS

Canadian Government and Industry Contacts

Consulate General of Canada in Hong Kong

(also responsible for Macau)

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8 Connaught Place, Central Hong Kong, China
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Foreign Affairs and International Trade Canada (DFAIT)

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Asia Commercial Relations (WOA)

Contact: Sara-Rose Harper, Trade Commissioner

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Fax: (613) 944-3049

Business Sectors Division (BMM)

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Export Development Canada (EDC)

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Tel.: (800) 850-9626 or (613) 598-2500

Fax: (613) 237-2690

E-mail: export@edc4.edc.ca

Internet: <http://www.edc.ca>

Industry Canada (IC)

5 Place Ville Marie, 7th Floor

Montreal, QC H3H 2G2

Contact: Morris Krymalowski

Tel.: (514) 283-7828

Fax: (514) 283-8916

E-mail: morris.krymalowski@ic.gc.ca

Association de l'industrie de la langue (AILIA)

Language Industry Association

65, Sherbrooke East

Montreal, QC H2X 1C4

Tel.: (866) 330-1310 or (514) 285-1310

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E-mail: communication@ailia.ca

Language Technologies Research Centre

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Tel.: (819) 595-3999

E-mail: info@ltrc.ca

Internet: <http://www.ltrc.ca>

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Wardlaw, Chris. Deputy Secretary for Education and Manpower. Policy Address. "3+3+4 Ambitious but Necessary." October 24, 2004.

OTHER REFERENCE MATERIAL

Useful Internet Sites

Australia International School: <http://www.aishk.edu.hk>

British Council: <http://www.britishcouncil.org/hk>

Canadian Chamber of Commerce in Hong Kong: <http://www.cancham.org>

Canadian International School: <http://www.cdnis.edu.hk>

Canadian University Association Hong Kong: <http://www.cuahk.org.hk>

Carleton University. Centre for Language and Applied Linguistics: <http://www.cael.ca>

CEC Network (student exchange fair): <http://www.studycanada.ca/hongkong>

Chinese Canadian Association: <http://www.ccahk.org>

Citizen and Immigration Canada Monitor: <http://www.cic.gc.ca/english/monitor/current.html>

City University of Hong Kong: <http://www.fed.cuhk.edu.hk>

Compass Real Estate (language services advertisements): <http://www.hongkongpropertyman.com>

Delia School of Canada: <http://www.delia.edu.hk>

Educational Testing Systems: <http://www.toefl.org>

Education and Career Expo: <http://www.biztradeshows.com>

English Schools Foundation: <http://www.esf.edu.hk>

F&C Consultants: <http://www.f-and-c.com.hk>

Foreign Student Services, Vancouver and Hong Kong. International Education Service (fair information and study abroad information): <http://www.fsshk.com>

Focus International Overseas Student Services: <http://www.focus.com.mo>

HKALE: http://www.hkeaa.edu.hk/en/hkale_intr.htm

HKCEE: http://www.hkeaa.edu.hk/en/hkcee_intr.htm

Hong Kong Civil Service Bureau: <http://www.csb.gov.hk>

Hong Kong Council for Academic Accreditation: <http://www.hkcaa.edu.hk>

Hong Kong Economic and Trade Office (in Canada): <http://www.hketo.ca>

Hong Kong Education City: <http://www.hkedcity.net>

Hong Kong Education Commission: <http://www.e-c.edu.hk>

Hong Kong Institute of Education Research: <http://www.ied.edu.hk/eng/research>

Hong Kong Polytechnic University (e3 Learning Project): <http://e3learning.edc.polyu.edu.hk>

Hong Kong Translation Society: <http://www.hkts.org.hk>

Hong Kong University: <http://www.hku.hk/education>

Institute for International Education (fair): <http://www.iie.hongkong.org>

International Baccalaureate Organization: <http://www.ibo.org>

International English Language Testing System: <http://www.ielts.org>

International School of Macau: <http://www.tis.edu.mo>

Invest Hong Kong: <http://www.investhk.gov.hk>

IT Week (trade show): <http://itweek.org.mo>

Kaplan Educational: <http://www.kaplan.com.hk>

LEARNet: <http://www.learnnet.hku.hk>

Macanese Associations in Canada: <http://www.casademacau.net> (Vancouver);
<http://www.casademacau.ca> (Toronto)

Native English Teachers' Association: <http://www.nesta.com.hk>

Open University (student statistics): <http://www.ouhk.edu.hk>

P.C. Lau Memorial Christian Alliance International School: <http://www.cais.edu.hk>

Phoenix International School: <http://www.phoenix.edu.hk>

Richard Ivey School of Business (Asia) Ltd.: <http://www.ivey.ca>

Sallsmanns Residential (language services advertisements):
<http://www.sallsmannsres.com/relocation/schools>

Univeristas 21 Global: <http://www.u21global.com>

University of British Columbia: <http://www.ubc.ca>

University of Cambridge International Examinations: <http://www.cie.org.uk>

University of Queensland: <http://www.f-and-c.com.hk>

Wall Street Institute: <http://www.wsi.edu.hk>

Workplace English Campaign: <http://www.english.gov.hk>