

We are pleased to provide you with this copy of Colleges Ontario's 2007 Environmental Scan.

The Environmental Scan is a comprehensive summary of information and data of significance for colleges and other sectors, providing a detailed analysis of the landscape in which colleges operate.

This year's Scan highlights clearly the increasing importance of the college sector in equipping the current workforce and future generations with the skills needed to tackle the workplace challenges of the future: the increasing pace of technological change, the need to ensure that internationally trained and skilled workers can participate fully in the workforce, the pressures to increase productivity in the face of growing international competition, and the need for retraining as the number of older workers increases. It is also a simple truth that, based on considerable research and data, a postsecondary education is the best and clearest route to lifelong opportunity.

The Environmental Scan provides a wealth of information to support strategic planning and decision making in Ontario.

The Scan provides a full picture of college students and graduates and their contribution to Ontario. It discusses college performance trends and the perceptions of colleges held by Ontarians, which is taking on greater significance as colleges work to attract more students and produce greater numbers of college graduates.

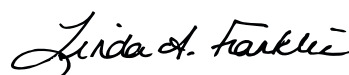
The report examines Ontario's demographic and economic prospects and the implications of each for employers and postsecondary institutions. Finally, it examines college system resources, including capital and operational funding, human resources, and student financial information, while highlighting the continuing fiscal challenges facing the college sector.

We hope you find the document a valuable resource as you work to move your organization forward. We would welcome any comments or questions you might have about this report, and look forward to continuing our work together on behalf of the students, employees, industries and communities we serve.

Sincerely,



**Barbara Taylor**  
Chair, Committee of Presidents



**Linda Franklin**  
President and CEO  
Colleges Ontario