BRITISH COUNCIL

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The Future Demand for English in Europe: 2025 and beyond

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The Future Demand for English in Europe: 2025 and beyond. A report commissioned by the British Council March 2018.

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PREFACE

English is many things: it's the ultimate connecting language for business; the vehicle for some of the finest literature in the world; a door-opener for British soft power; and the source of a thriving culture and education sector within the UK and beyond.

The British Council commissioned this report from Trajectory in order to understand the health of the English Language Teaching (ELT) ecosystem in Europe today, and what actions should be taken to protect and nurture it over the years to 2025.

We hope The Future Demand for English in Europe: 2025 and Beyond will be useful to everyone in the sector: language tuition providers, ELT publishers, assessment providers and examination boards – as well as to university departments.

As a nation and a society we are entering a new and rapidly-changing environment – one in which great risks are balanced by great opportunities. The English language, both as commercial lingua franca and as cultural phenomenon, will be fundamental to navigating those changes successfully.

The major challenges facing the sector, and spelled out in this report, can be sorted into three categories: technology, demography, and geography. Each one poses some urgent questions.

Changing technology offers new and exciting ways of accessing English learning – but are we ready to make them work? Is the sector doing all it can to anticipate and meet inevitable shifts in population numbers? And what is the role of ELT in a post-Brexit UK?

I believe that if we can find answers to those questions, and base our future policy making on an honest and confident assessment of the facts, we will set ourselves on the path to success.

This report is a small step in that direction.

Christopher Rodrigues CBE
Chair, British Council

FOREWORD

The British Council has been active in English language teaching for more than 80 years, and continental Europe has been a key area of focus since our first teaching operations opened in Portugal in the 1930s.

We are entering a moment of significant change in the UK's relationship with the EU following the referendum. We also live in a world where there is debate about globalisation versus protectionism, but without doubt economies are moving and changing more rapidly than ever before thanks to advances in digital technology.

In this political and economic climate we also sensed a gathering pace of change in the demand for English language learning. We saw this as an interesting moment to take a snapshot of the demand for English in Europe and the direction it may take towards 2025.

To gain some insight into this changing environment, we commissioned Trajectory to carry out a European study, taking seven European countries as a sample; namely France, Greece, Italy, Spain, Poland, Portugal and Romania, to try to better describe the nature of this change. The methodology for the study combines study of secondary data sources, where market and demographic data is available, and makes use of in-depth interviews with stakeholders and experts across the EU to gain a qualitative overview.

We were interested in changes in:

- Education systems – is the quantity of English being taught in schools increasing? What impact is this having? How widespread is the use of English medium instruction?
- The numbers of people studying English – will demographic or other factors alter not just the quantity but also the nature of this demand? How do providers see the needs and motivation of adults and young learners evolving in a new economic and political reality?
- Employment – what exactly are employers looking for in terms of language level and certification in a world where international business and trade are dominated by the use of English?
- Political factors – what impact will Brexit or other political developments might have on the use and demand for English?
- How people are learning English – what impact is digital disruption having on the field of language learning?

The impact of technology is perhaps the most difficult to predict. For the generations of digital natives technology is something highly significant; people are interconnected and using English on an international scale unimaginable a few years ago, and the potential for digital solutions to enhance learning is an exciting phenomenon.

We were keen to publish an accessible overview, and we do hope stakeholders and colleagues from the UK ELT sector and overseas will be interested to see the findings.

Mark Robson
Director English and Exams, British Council

EXECUTIVE SUMMARY

The aim of this project was to quantify and describe the future demand for English language teaching and learning to 2025 and beyond in seven European countries (France, Greece, Italy, Poland, Portugal, Romania and Spain).

The project was carried out in late 2017 and early 2018 by Trajectory, an independent research consultancy specialising in strategic trends analysis and forecasting. The approach is mixed method combining literature review, quantitative analysis of secondary data and qualitative research.

The quantitative modelling is based primarily on the future demographic profile of each country.

In-depth interviews were carried out with 62 experts from seven European countries and international experts. Interviews were conducted with individuals representing:

- mainstream education (ministries of education, regional educational authorities, schools and universities)
- the private English language teaching market
- employers and organisations representing commerce and trade
- digital developers of English language products (such as Duolingo, Babbel and Fluentify)
- linguists and language teaching experts.

KEY FINDINGS

A fall in the total number of learners

In terms of quantifying the demand for English, because of changes in population and age (and an increase in the number of people who have studied English in school, for more hours and for longer), the total number of potential learners[1] across the seven European countries will fall by 15.3 million. Overall this is an 8.8 per cent fall between 2015 and 2025 (from 172.5 million to 157.2 million). This varies by country from a 16 per cent fall in Romania to a 5.8 per cent drop in Italy (see Figure 1).

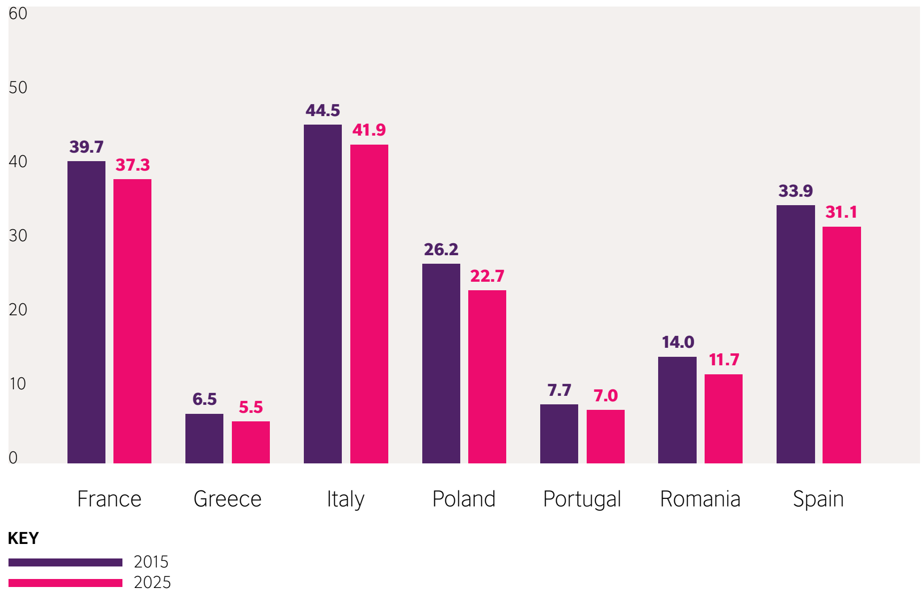
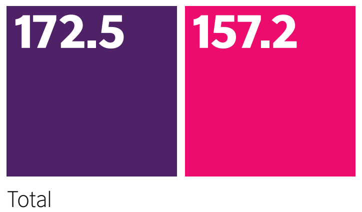


Figure 1: Number of potential English learners, 2015 and 2025, by country (millions)



Most English learners first receive instruction in school, and the demand for English in school is very much affected by the birth rate. As shown in Figure 2, the analysis of population change in the seven countries indicates that the fall in demand from the school population (generally aged six to 18) is one million (31.8 million in 2015 to 30.8 million in 2025). This represents a 3.2 per cent fall.

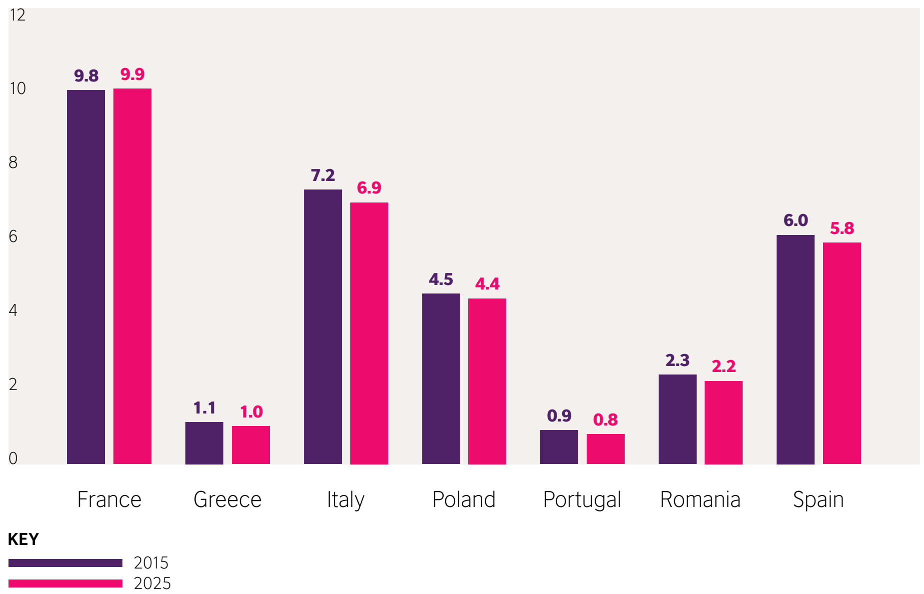
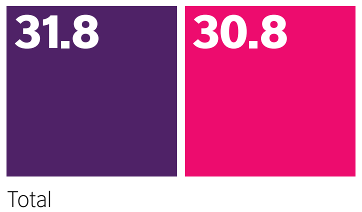
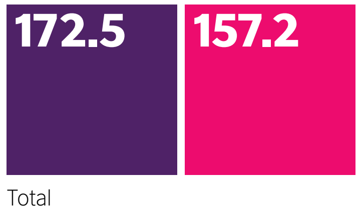


Figure 2: Number of students learning English in state education by country, 2015 to 2025 (millions)



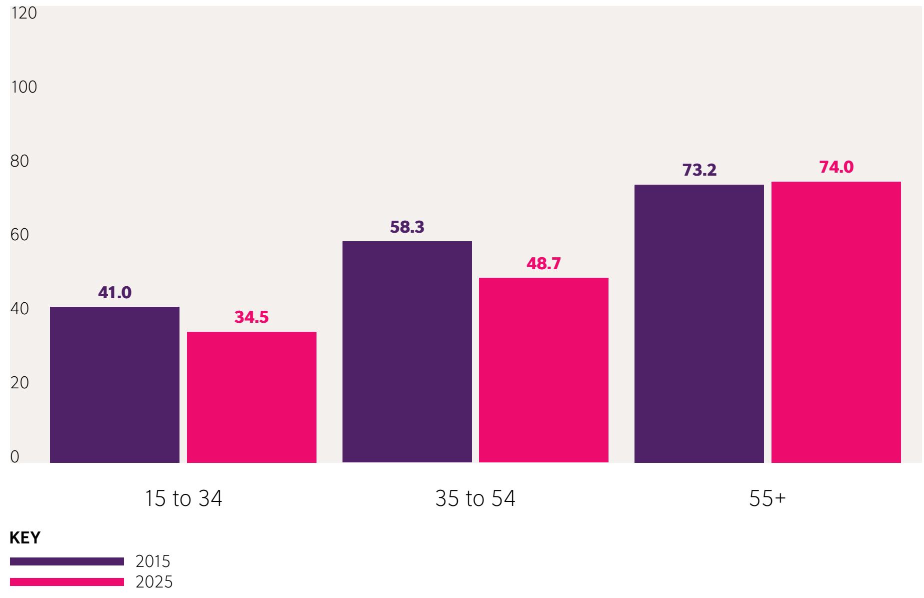
[1] See Appendix B.

Figure 3: Number of people who might want to learn English, 2015 and 2025 by age group (millions)



Changes in the age profiles of learners

Although children receive a large amount of instruction in English during their school years, some adults (and particularly working-age adults) continue to learn English. Population age profiles are changing, so we looked at how this would affect the potential demand for English by age group.



As shown in Figure 3, there are very marked differences between the different age groups. There is a significant drop in the demand for English from the under 55 age groups. The 15–34 age group drops by 15.7 per cent and the 35–54 age group drops by 16.4 per cent. There are two reasons for this. First is because of demographic changes – there is a fall in population for both these age groups. Second, because of government initiatives to improve English in schools and individuals learning English outside of mainstream education (formally or informally), the proficiency levels of people moving into these groups will increase while the numbers of beginners needing to learn English falls.

We also forecast a small increase in the number of older people wanting to learn or improve their English – this is a result of fewer proficient people in the older groups (in many countries, older adults were not taught English at all or were not taught particularly well) and a cohort effect where older people have more time and desire to learn English (for example, for travel, visiting relatives abroad or to keep themselves mentally active).

The impact of new technologies

New technology has and will continue to have an impact on the way in which English is acquired and learnt. The use of technology in language learning is well established in the formal mainstream and private teaching sectors and will continue to develop, as will technologies that allow learners to study independently outside of the classroom. Digital products will both subsitutute some aspects of language learning and enhance face-to-face learning. There is no evidence, however, that by 2025 there will be the large-scale substitution of face-to-face teaching with artificially intelligent bots or even instantaneous translation devices that will get rid of the need for second language skills.

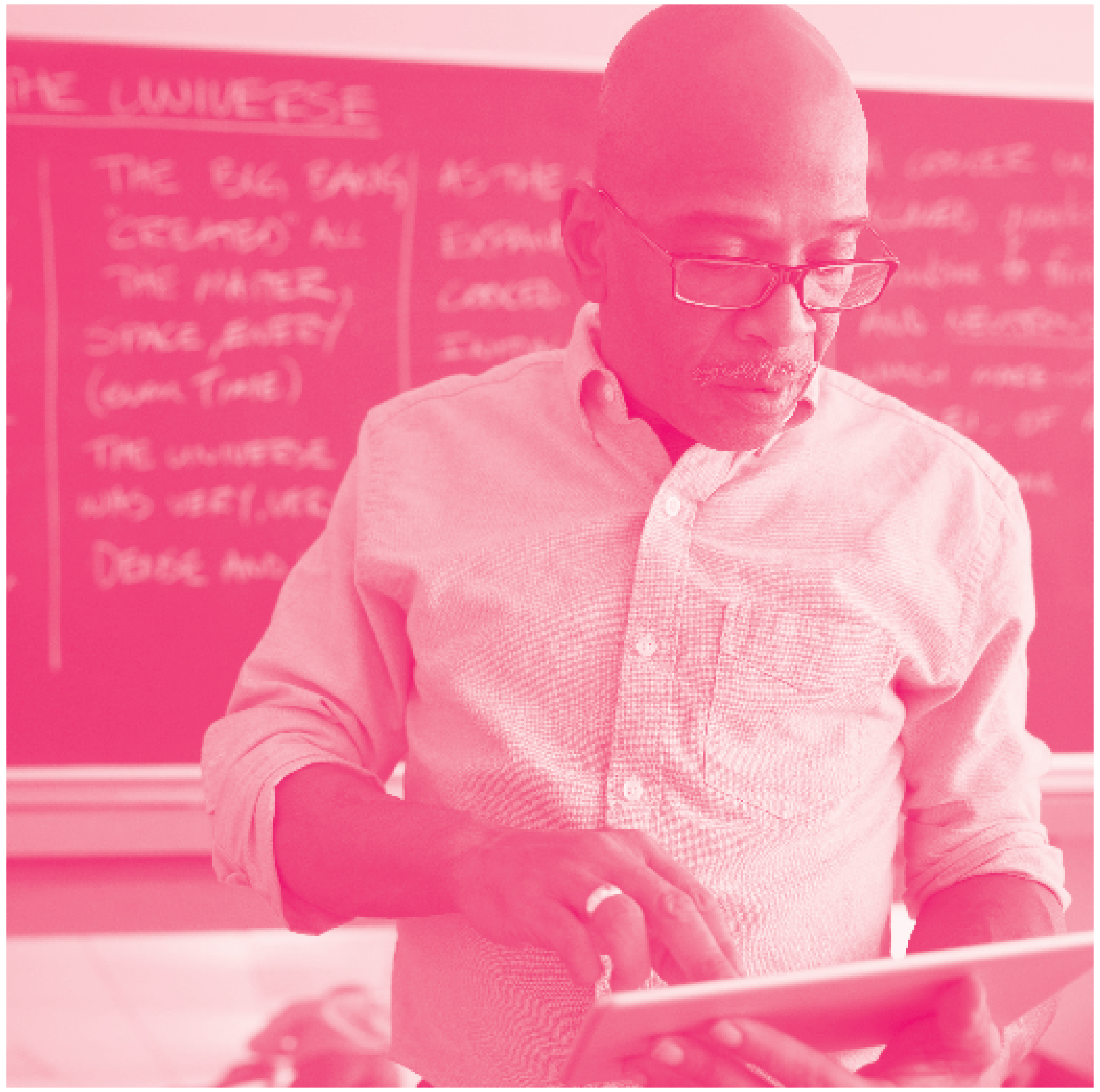
The most potentially disruptive and transformational developments that might affect the English teaching market by 2025 are those technologies that can be developed to deliver some of the wider current consumer trends and demands. 'English learners as consumers' want flexible, personalised, purpose-specific and time-effective English language learning with a smooth, personalised customer journey. These trends will see the continued decline in the inflexible 'night school' or 'weekend school' delivery model for adult learners.

At this point, there is no successful or efficient technology-based model that can effectively deliver the current consumer demand for language learning. There are many apps and digital platforms, but there is little evidence that learners follow them through to completion or that they can replace face-to-face teaching entirely – this is particularly the case at higher levels. Currently lots of technology is not as effective as face-to-face teaching (or simply substitutes it with 'screen-to-screen' teaching) and tends to be used by teachers alongside face-to-face teaching approaches to enhance courses or by individuals to refresh or consolidate what they have learned in a face-to-face setting. On the other hand, technology is being developed and used in Asia that will have a significant impact on the way in which language assessment is carried out both during the learning process and to test students at the end of a course or module. These will eventually be on offer in Europe and the ability to credibly test and accredit students' proficiency will fill a gap in the digital market.

It is only a matter of time before a successful technologically enhanced delivery model is developed that meets consumer demands for personalised, purpose-specific and time-efficient learning and tackles some of the shortcomings of current digital products. If the sector itself can work with technology developers to respond to these demands, increased uptake of these products could more than compensate for the demographic decline in the adult market for face-to-face courses and further enhance face-to-face offers.

Many expert linguists and teachers were clear that the face-to-face English language teaching sector needs to take an active part in developing technology for propagating better proficiency in English rather than being passive recipients of what technology developers and publishers think the sector needs.

Image: Teacher with digital tablet



'English is now the lingua franca. That's how it is. You have to speak English if you want to act and move in globalisation'

Édouard Philippe,
French Prime Minister[2]

English will continue to be the dominant language in Europe

Findings from the literature review and qualitative research indicate strongly that English will continue to be the dominant language in Europe and remain the preferred second language for most Europeans in 2025.

English is the global lingua franca in business, academia, diplomacy, media, social media and technology. European governments recognise its importance for cross-border trade and international competition, and consequently have introduced educational policies and invested in measures to improve English proficiency among their populations. There is no indication that this will change in the timeframe covered by this study.

English has an important role as a 'relay language' between speakers of less widely spoken languages (for example, Danes speaking to Greeks) and languages that are difficult for Europeans (for example, Mandarin). In all likelihood its global reach will increase in the time period covered because important emerging economies such as China and India already use and will continue to use English as their relay language.

These are the macro reasons for the demand for English to increase. At a micro level, individuals recognise that English is increasingly important for securing employment or improving their employment prospects in many sectors.

Compared with other languages, English is considered to be relatively easy to learn and is the most widely known second language in Europe. English has a huge presence, and many people are exposed to it because it dominates film, television and music in Western culture as well as technology and the internet. Culturally it is present on a global scale, making it easy to access, familiar and (particularly for young people) attractive to learn.

This research was carried out in a time of significant global political change, namely the debate about globalisation versus protectionism and Brexit, both of which could affect demand.

Although there may well be increased protectionism in some parts of the developed world, emerging markets still have more to gain by increasing their volume of global trade. It seems likely that the volumes of global trade will at least remain at their current levels and that this will not diminish the demand for English language teaching and learning by 2025.

Brexit is not seen as a significant threat, though the full impact of it is as yet unknown. The main drivers for the demand for English are larger than the UK. English is the language of the USA and the language that emerging large economies are using to engage with the world – this is far more important to the future demand for English in Europe than Brexit. Demand for English will remain high over the timeframe that this report focuses on.

[2] *Morocco World News.* 2 March 2018, French Prime Minister urges students to embrace English Language. See https://www.moroccoworldnews.com/2018/03/241663/french-prime-minister-urges-students-to-embrace-english-language/

Continued improvements in English teaching in mainstream education

All European governments in this study have introduced policies to improve the quality and quantity of English instruction in schools. In the long term, this will have a big impact on the English proficiency levels in their populations. This is particularly so in countries such as Spain, where bilingual education programmes are gaining huge momentum and in Italy where CLIL teaching (Content and Language Integrated Learning where teaching for subjects such as maths and science, is carried out through the medium of English) has become compulsory in upper secondary schools. The English Impact report,[3] for example, already shows significant improvement from students in the Madrid bilingual programme and in future, when students complete their entire school career in these programmes, results for school leavers are set to rise. Government policy is having a dramatic effect on the percentage of school students who study English as a foreign language. By lower secondary school nearly all students (97.3 per cent) in Europe study English.[4]

Despite this, it is unlikely that by 2025 significantly increased numbers of students will leave school with the proficiency levels needed by employers. Most European countries require the CEFR[5] levels A2 (waystage) at the end of lower secondary and B2 (vantage) at the end of upper secondary.[6] Most school leavers have a level of English which is not high enough for the workplace. The quantity of English instruction in schools is increasing and the quality of English teaching is improving, but many teachers are still dealing with classes that are larger than ideal for language teaching, mixed ability classes and, in some countries, they are continuing to use an approach focused narrowly on grammar and on passing national school leaving examinations. This contrasts with ever-increasing employer expectations in terms of proficiency and the communications skills needed for the workplace. European school leavers' proficiency is improving but it is not yet proficient enough and will not improve sufficiently by 2025 because of the time it takes for educational changes to have an effect.

To address this, governments need to continue to plan ahead and sustain their investment in resources and teacher training. There is no quick fix to raise language proficiency levels – it takes time and significant investment.

[3] https://www.britishcouncil.org/sites/default/files/g303_03_english_impact_report_madrid_web1.pdf

[4] European Commission/EACEA/Eurydice (2017) *Key Data on Teaching Languages at School in Europe – 2017 Edition*. Eurydice Report. Luxembourg: Publications Office of the European Union.

[5] The Common European Framework of Reference for Languages (CEFR) defines six levels of proficiency, from 'basic user' to 'proficient user': A1 (breakthrough), A2 (waystage), B1 (threshold), B2 (vantage), C1 (effective operational proficiency) and C2 (mastery).

[6] *Op cit.* European Commission/EACEA/Eurydice (2017).

'Lots of people need English and want to learn. The problem is time.'

Michal Zajac, Co-owner, Lublin Royal School of English, Lublin, Poland

Demand for better and more specific English

The demand for learning English to improve and to top up the skills learned in school looks set to increase. This demand comes from the parents of young learners (who recognise that their children need better English than the school system can provide) and from adults who need good English to improve their employment prospects, study or work abroad, or be able to use it for a specific purpose.

With a larger proportion of the adult population having some proficiency in English in future, it is likely that the demand for 'top-up' tuition or refresher courses throughout life will rise. Many providers in mature markets (for example, Spain and Portugal) are already seeing a demand for short, sharp courses from adults who need English for a specific work or family reason and a decline in the adult beginner market.

Increased globalisation has pushed up the demand for English in the workplace and also increased transnational mobility. This has resulted in an increase in working and studying aboard and in cross-border family relationships and the need for English in a more domestic context, for example, speaking with English-speaking grandchildren or in-laws.

The trends of living longer, life-long learning, Third Age universities and the importance of keeping mentally active as we get older suggests that more mature learners will continue to come into the market for learning English as a hobby, for personal development, or family reasons.

The shape of future demand

In some countries there has been a downturn in the number of adults enrolling for regular evening or weekend courses that run over many months or an academic year. The English language teaching market needs to respond to the wider consumer trend of increased personalisation and customisation of products and services. Adult learners want a more finessed, flexible and individualised product, focused on their needs and which fits in with busy lives. The sector has already responded to this in the corporate market where short, niche, focused courses are developed for in-house use. The sector needs to respond to the demand for adults to be able to use different modes (face-to-face, online, mobile) and with the flexibility to study at their own pace over a shorter and less rigid time period.

In terms of numbers, the number of young and teen learners (primary and secondary school age) will decline because of population change. Initiatives to improve standards in state education systems take a long time to roll through and have a positive impact on the proficiency level of the adult population. Demand from young learners will continue because, according to the employers and expert linguists interviewed, mainstream schools do not produce school leavers with the necessary linguistic skills or proficiency levels high enough for the workplace.

Our conclusion is that the future demand for English in Europe will decrease in terms of numbers of learners and the proportion of adult learners who want to learn solely in a classroom setting. This is counterbalanced by an increase in demand from learners wanting to improve their proficiency through a blend of self-directed means and shorter but intensive instruction that is likely to include a face-to-face component.

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THE FUTURE DEMAND FOR ENGLISH IN EUROPE

THE FUTURE DEMAND FOR ENGLISH IN EUROPE: MACRO TRENDS

From the different research methods used, we were able to identify a range of macro trends that will shape the future demand for English language teaching and learning. Here we have organised the trends using a PESTLE (political, economic, social, technological, legislative, educational) approach.

POLITICAL

This report is being produced at a time when free trade and globalisation are facing greater challenge and scrutiny than at any time in the last 30 years. Nonetheless, the current and immediate future environment is one in which the volume of cross-border trade is predicted to increase. Even if those arguing for greater protectionism prevail, historically large volumes of international trade will still take place.

In a globalised world, English remains the lingua franca of international business and commerce,[7] and multinational companies including Airbus, Renault and Samsung have made English their global corporate language.[8]

As a result, European governments increasingly recognise the importance of improving English proficiency in their population to compete internationally and for cross-border trade. In many countries (Greece, Poland and Romania) English became the first foreign language taught in schools after joining the EU. In the aftermath of the 2008 financial crisis, and despite harsh austerity measures in most EU countries, improving English proficiency for economic competitiveness and productivity reasons has remained a government priority. Across mainland Europe there has been a push to increase the quality and quantity of English taught in schools. Impetus for this investment in English capability has come at both the national and EU level. The 2002 European Council meeting in Barcelona invited EU countries to 'improve the mastery of basic skills, by teaching at least two foreign languages from a very early age'.[9]

Governments responded to this. In 2005 just over two-thirds (67.3 per cent) of students in primary education in the EU studied at least one foreign language. By 2014 this had risen to 83.8 per cent.[10] At an EU level, 83.8 per cent of all children in primary education study one or more foreign language, and English is the most widely learned language (79.4 per cent)[11] at this stage of education. By secondary school nearly all students (97.3 per cent) study English in their lower secondary education.[12]

In countries where studying a foreign language is compulsory, English is specified in nearly half of all countries and is often the language of choice in the others. English is the mandatory first foreign language taught in state schools in Greece, Italy and Portugal.[13] Although French and German are popular second foreign languages in European schools, they are taught at much lower levels than English. At EU level, 23 per cent of students study French in general upper secondary education while the percentage of students choosing French is falling slightly. In contrast, German is studied by 18.9 per cent and 19.1 per cent study Spanish.[14]

A strong trend has been to lower the age at which children start learning English at school. Governments in many countries (Greece, Poland, France, Italy, Spain and Romania) have lowered this to the first year of mandatory primary education (usually five to six years old) and in Spain and France, English is increasingly taught in state preschool (three to five years old).[15] National governments have also mandated that children should also learn English for longer – many now study English throughout their school career and the number of contact hours is also increasing.

There has been a trend for central and regional governments to invest in raising the quality and skills of English language teachers (improving standards and training for specialist language teachers and other generalist teachers teaching English, or specialists teaching in English) and, in the most ambitious nations, increasing the number of bilingual schools and schools providing content and language integrated learning (CLIL).[16]

[7] Dewey, M (2007) English as a lingua franca and globalization: an interconnected perspective. *International Journal of Applied Linguistics* 17/3: 332–354.

[8] https://hbr.org/2012/05/global-business-speaks-english

[9] http://eur-lex.europa.eu/legal-content/GA/TXT/?uri=LEGISSUM%3Ac11083

[10] *Op cit.* European Commission/EACEA/Eurydice (2017).

[11–15] *Ibid.*

[16] This is a programme where pupils learn a subject, for example, biology or geography, in a foreign language.

Despite this trend in government investment in English language teaching and training, many of our expert contributors pointed to the continued limitations of English language teaching in the state education sector. Large class sizes, mixed-ability classes, a focus on grammar, 'chalk and talk' teaching methods and, in some countries, primary school teachers' low levels of English proficiency remain widespread issues slowing progress. However, the overall political trend has been an increase in the provision of English in schools and initiatives to improve proficiency levels.

The implications of the UK leaving the European Union (Brexit) were thought to be small and varied according to our experts. The clear view was that the need for English is based on factors both wider and deeper than the UK's relationship with Europe. Experts were clear in their view that English remains the lingua franca not only for cross-border and international business, but also academia, international education, international media, diplomacy, new technologies and the internet. None of our experts thought that this would change in the next decade or even longer.

Interviewees, particularly employers, did not believe that the dominance of English was under threat from Mandarin or other major European languages in the coming decade. English is too widespread, too well established and perceived as easier to learn.

Indeed, in terms of the Brexit fall-out, French experts told us that France recognises that in order to lure US finance companies from the City of London to Paris, improving English proficiency in the sector is a must, and that Brexit could, somewhat counter-intuitively, result in a boost to English language teaching and learning in France. The experts interviewed even believe that English will remain the common language for conducting the business of the EU, after the UK's departure (albeit perhaps an increasingly EU version of English). This is because English is not perceived as the preserve of English-speaking nations.

English is used as the relay language between countries using less widespread languages.[17] With 24 official languages in the EU it is vital that one language remains the medium underpinning the enormous translation machine that supports EU civil servants in their daily tasks. While the number of native English speakers in the EU will drop significantly with Brexit, if English was replaced, the rearrangements and recruitment of personnel with different language skills would be enormously costly and time-consuming.

'English is the common language in Europe… it doesn't belong to the UK or the USA.'

Daniel Diez, Human Resources Business Partner, Elavon Merchant Services, Spain

[17] Jacobsen, UC (2017) English in the European Union after BREXIT: Inclusion effects of a language without an owner. *Culture, Practice and European Policy* 2/1: 9–11. See https://www.uni-flensburg.de/fileadmin/content/seminare/soziologie/dokumente/culture-practice-and-europeanization/vol.2-issue-1-2017/vol.2-no.1-jacobsen.pdf

As English use has matured among communities across Europe, it has morphed and adapted to local needs, and now more nuanced forms of English such as 'Euro-English' and 'International English' have emerged[18] (for example, using words such as 'handy' for the British term 'mobile phone', or adopting terms such as 'la newsletter'). As non-native speakers outnumber the number of native speakers in a post-Brexit EU, new linguistic norms and standards may become a regular feature of the future version of Euro-English (for example, adopting US English spellings or inventing new words with an English root). This trend is contrary to any suggestion of a rejection of English. One Swedish MEP is quoted as saying that keeping English as the main working language of the EU would make communications fairer to everyone, precisely because most of the EU states would be speaking it as a foreign language (which would not be the case with French).[19]

European governments are investing in improving their population's English proficiency because it is an indispensable tool of international commerce and global communication. The findings of this research indicated that this trend is extremely unlikely to change in the period to 2025.

[18] Modiano, M (2017) English in a post-Brexit European Union. *World Englishes* 36/3: 313–327. See http://onlinelibrary.wiley.com/doi/10.1111/weng.12264/full

[19] Steinhauser, G (2016) English Loses Currency as Europe's Lingua Franca After Brexit Vote. *Wall Street Journal* 27 June 2016. Available online at: https://www.wsj.com/articles/eu-to-say-au-revoir-tschuss-to-english-language-1467036600

Image: *(above)* Teacher's meeting
Images: *(left)* Spanish children at school

MACRO TRENDS

Image: Teaching

ECONOMIC

‘English is the number one language in the business sector.’

Barbara Baranska, Polish Banks Association, Warsaw

‘English is an essential skill for finding a job… There’s an expectation to speak English – practically in every institution, be it a chain of restaurants, or the national airport, banks.’

Professor Dr Hanna Komorowska, Head, Dept of Applied Linguistics, University of Social Sciences and Humanities, Warsaw

Interviewees’ views reflected the literature reviewed, and across the different sectors there was widespread agreement that English is and will remain the language of international trade, regardless of the debates around globalisation going into reverse. Interviewees believed that the demand for English will not decline even with rising new economies (such as Brazil, Russia, India, China) and emerging nations.

The response of China has been to learn English (analysts forecast that the ELT market in China will grow 21.9 per cent in 2017–22),[20] and despite demographic changes between English and Spanish speakers in the USA,[21] English remains the language of the US and global economy. Although Spanish is widely spoken, presently no Spanish-speaking country has enough global weight economically. Despite the economic dominance of Germany, German is perceived as difficult and not used enough globally.

Mandarin was also perceived as a difficult language to master and interviewees believed Europeans will prioritise proficiency in English, a language in which they already have a strong knowledge base, before learning Mandarin or Spanish as their third language.

English is recognised as the language of commerce, academia and diplomacy, and is used extensively in many professions and sectors (for example, aviation, media, science, medicine, technology and the internet). Even in parts of the economy and professions that are dominated by the home language (such as law), trends indicate that English will remain or become the relay language.

Employers and some important professional and commercial sectors demand proficiency in English. Our interviewees did not see this trend changing. For multinational companies, English is the day-to-day working language. This is especially true when the company first relocates, when there will be a high proportion of overseas employees. Later, when more locals are employed, the company might become bilingual. But, even then, English is still the language used in cross-national senior management meetings and for internal international communications.

The demand for English and proficiency levels within a country can be fragmented. In some countries it can vary by region (for example, in Spain and Poland) and there are often urban and rural divides. In Poland and France, the demand for English is higher in the larger cities, and German is more popular in the border areas (as Russian is along the Kaliningrad Oblast border with Poland). In Greece, the demand for English is high across the mainland and the islands because of widespread tourism.

For individuals, demand for English remains high because proficiency in English is a ‘passport’ skill to get a job, be promoted, go into management or work overseas. English is demanded in some sectors, even in otherwise low-skilled roles (for example, the hospitality and service industries, and tourism). English is now used across the board, from taxi drivers to diplomats. In some countries, proficiency in English was once the preserve of the middle class and higher economic groups; the trend is now for all socio-economic groups to be more proficient in English as more trades and vocations demand English.

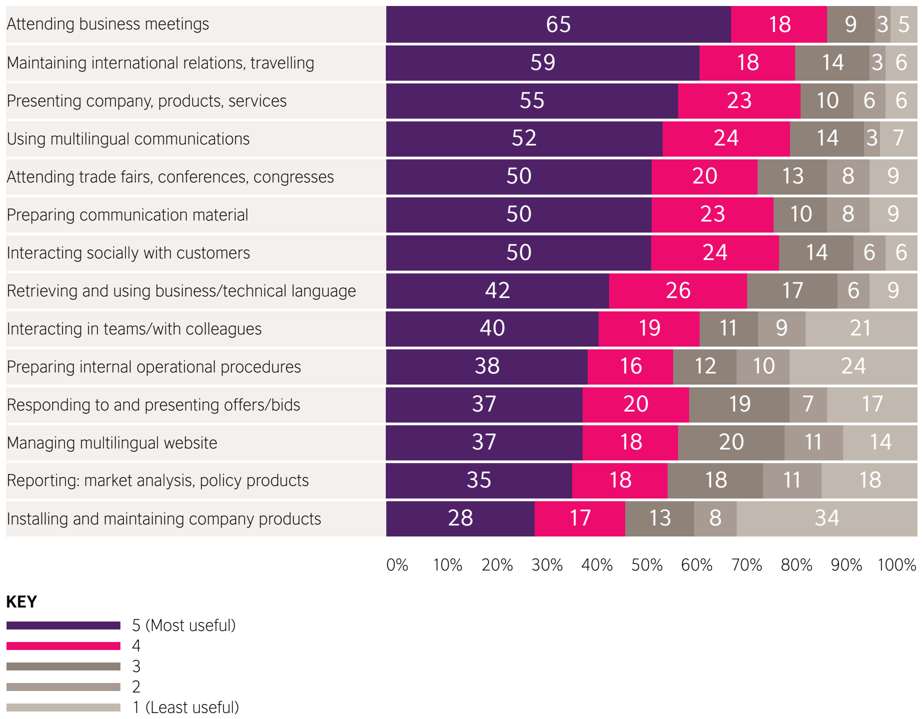
[20] https://www.prnewswire.com/news-releases/china-english-language-training-market-2017-2021---market-to-grow-at-a-cagr-of-2193-300560318.html

[21] www.pewresearch.org/fact-tank/2013/09/05/what-is-the-future-of-spanish-in-the-united-states/

The borderless workplace? European employers' perspectives

The demand for foreign languages and communication skills continues to rise steadily in the labour market in Europe, as evidence in various recent studies on the role of foreign language skills in the European labour market has shown. In countries where English is not an official language, 69 per cent of employers said that English is significant for their organisation.[22] Governments across Europe have recognised and responded to this by improving and increasing English language teaching and learning in schools, to raise the proficiency levels of school leavers, and eventually their working populations.

Despite rising proficiency in English in Europe, incorporating English as the medium of communication in a corporate setting can sometimes be an organisational challenge. Even in countries where general English proficiency is high, moving from general English to industry/sector-specific English, with the linguistic confidence for activities such as giving presentations, negotiating, participating in international conference calls, networking at events, etc., is a challenge. A 2011 European Commission study on foreign languages and employability found that attending business meetings was the activity that was seen to benefit most from a good level of spoken English (followed by travelling, maintaining international relations, and presenting company products and services).[23] Even if English is one of the working languages in a major multinational company, the English proficiency requirements differ from role to role.



Source: CELAN Final Report (2011), as cited in European Commission (2015) *Study on Foreign Language Proficiency and Employability. Final Report.*

Figure 4: Business activities where foreign languages are most useful

[22] Cambridge English (2016) *English at Work: global analysis of language skills in the workplace.* See http://cambridgeenglish.org/images/english-at-work-full-report.pdf

[23] CELAN Final Report (2011), as cited in European Commission (2015) Study on Foreign Language Proficiency and Employability. Final Report.

'Some jobs require candidates to attach a language certificate to their CV, but they are usually at a more senior level. If the role is not particularly senior, the interview may take place (partially) in English, and the hiring manager will be able to tell how good someone's English is.'

Agata Stefan, British Romanian Chamber of Commerce

Some major employers opt for in-house English courses, but this varies by country and these companies are generally in the minority across the EU. In some countries, employers or sectors tend to rely on staff being responsible for improving their English skills, or they recruit only if the candidate has a high enough level of English.

English varies across different economic sectors. In 2013, aerospace, defence, and professional services and technology scored the highest when it came to using English, while government and real estate scored the lowest.[24] Most employers interviewed thought demand would increase. The majority of global employers report that they need their staff to improve their English skills.[25] The digital sector has responded to this demand and many products are being developed for the business and corporate market. Fluentify and Myngle are digital platforms offering professional English distance learning, and are popular with the banking, IT, consulting and pharmaceutical industries in southern Europe (Italy, France and Spain). Fluentify allows staff in HR teams to track employees' progress, set tests and award certificates. The platform does not create content, but it allows for mobile and flexible high-quality tutoring that can be delivered in a company-wide setting through one-to-one teaching.

Even in the smaller, family-owned business sectors (common in Portugal, Greece and Italy), better skill and fluency in English is needed in the tourism and hospitality sectors, as more tourists come from further afield (China, Korea and Japan) and are more likely to speak English than other European languages.

In some industries, English has not traditionally been required. Yet in an increasingly globalised world this is no longer the case. For example, Diana Deleanu of the British Romanian Chamber of Commerce reported that legal English is only taught in a few institutions and is not well regulated; lack of regulatory standards and sector-specific high-quality teaching materials can have major real-life consequences, with goods or people being turned away at national borders because of poorly translated legal documents.

[24] Pearson (2013) Heightened Urgency for Business English in an Increasingly Global Workforce. A look at the 2013 Business English Index & Globalization of English Report. http://static.globalenglish.com/files/case_studies/GlobEng_BEIreport%202013_EN_A4_FINAL.pdf

[25] http://static.globalenglish.com/files/case_studies/GlobEng_BEIreport%202013_EN_A4_FINAL.pdf

Many employers interviewed were not using the well-established global certificates of English proficiency but instead were using in-house testing or third-party testing when recruiting. HR managers said that even high-level qualifications did not always guarantee fluency or the ability to use English in different work-related contexts, so this was tested as part of the recruitment process. This is not to suggest that employers do not value accreditation and certificates, but at this point they are not developed to test the language skills in contexts that matter to employers.

With an increasingly mobile European workforce, partnerships between the recruitment industry and English language testing providers are becoming more common. Michael Page recruitment in Portugal assesses candidates' English levels in-house or sends senior-level candidates to be assessed at the British Council teaching centre (often when the role involves senior-level staff, such as being an assistant to a chief executive). However, there was also evidence from the private language teaching sector that some major international employers were using them to assess proficiency and/or asking for evidence of proficiency.

In countries where unemployment remains high, such as Italy, Spain or Greece, young professionals continue to invest in skills that will improve their employment prospects. A language certificate can function as a lifelong professional requirement. For example, the Supreme Council for Civil Personnel Selection (ASEP) in Greece usually requires civil servants to know a language before hiring them.[26]

'Companies are getting far more worldly-wise about insisting on having some sort of certification to back up people's assessment of their levels of English.'

Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal

[26] Papaefthymiou-Lytra, S (2012) Foreign Language Testing and Assessment in Greece: An overview and appraisal. *Research Papers in Language Teaching and Learning* 3/1: 22–32. Available online at https://eclass.uoa.gr/modules/document/file.php/ENL259/2012-SPL-%20Foreign%20language%20Testing%20and%20assessment%20in%20Greece%20...%20%28rpltl%29.pdf

Image: Teacher and student with laptop and tablet

DEMOGRAPHIC

‘In Warsaw alone, we have more first year English Philology students than we had English students in the whole of Poland 25 years ago... there are huge numbers now.’

Professor Dr Hanna Komorowska, Head, Dept of Applied Linguistics, University of Social Sciences and Humanities, Warsaw

‘A significant difference between countries is in the way people start learning the language. In certain countries, people start to learn English when they are really, really young at school. In other countries, this is something that is 100 per cent delegated to private courses. If you look at Italy, we are in the middle because parents believe their kids are learning English at school, but then sometimes they’re not, and so when kids get to secondary school level, some of them will try to fix the problems their kids are having.’

Giacomo Moiso, Fluentify

Age, and the age structure of a population, has a significant bearing on the demand for English language learning and teaching. Younger people are growing up in a period where there is a greater political and economic emphasis placed on the importance of learning English. In addition to these ‘top-down’ drivers of demand for English among young people, there are also many ‘bottom-up’ drivers, with English being the dominant language of youth-dominated activities such as online gaming and social media.

Older age groups are far less likely to have been provided with anything like the opportunities to learn English as today’s children and young adults. In many countries, the political switch to English as the first foreign language has been the result of political upheaval (Poland and Romania changed from Russian to English after the fall of communism. Spain replaced French with English in the 1980s).

Children and young people driving demand

The number of schools in the private English language teaching (ELT) sector depends on many factors, including the cultural trend of sending children to private English classes (high in Spain, Poland and Greece, but rarer in France, where generally the sector is aimed at adults, although this is changing).

In all the countries we surveyed there is a mixed economy of state provision and the private ELT market. For children and teens, the private ELT market was described by one expert as ‘topping up’ what is happening in schools, particularly for speaking and listening skills. It was recognised by many interviewees that it was very rare to become truly proficient in English only by studying in mainstream school and that the target levels for the end of secondary education were not high enough. In Poland, for example, although students need to pass an English exam to gain their school leaving certificate (Matura), the actual pass mark for English is around 30 per cent. Even some students on bilingual programmes still opt for ‘topping up’,[27] although in Spain there is an expectation that this will fall, as cohorts work their way through the bilingual programes.

The expected minimum level of attainment at the end of upper secondary school is B2 (vantage) for France, Italy, Portugal and Romania, and B1 (threshold) in Spain and Poland. Only in Spain, France and Poland is there provision to test at the more advanced C1 level.

The impression from employers and linguists was that, generally, the school system provides a grammar-based scaffold and, though there are improvements which will likely accelerate with time, currently in no country did school leavers generally have English that was developed enough for a working environment.

[27] https://www.britishcouncil.org/sites/default/files/g303_03_english_impact_report_madrid_web1.pdf

In many countries, this often means that the best English speakers come from better-off families – though, across Europe, there was evidence that families are willing to make the sacrifice to send their children to private classes, whatever their income bracket.

Since 2013, birth rates have risen slightly in Greece, Spain, Poland, Portugal and Romania.[28] As we have seen, politically the trend is for governments to provide earlier, more and better English provision in state schools. This perhaps counter-intuitively drives up the demand for the private English language teaching sector because it 'tops up' and improves on what has been learned in school as there is more of an appetite for higher proficiency and more awareness of linguistic shortcomings. Though it needs to be noted that birth rates are predicted to fall dramatically in some European countries, as well as rise in others, over the next decade, it is often children (through their parents) and young people who fuel the demand for English.

English words have come into Polish (internetowy, multimedialny) and Spanish (piercing, tweet, post, hooligan, hacker, hobby), and the Enrichment Commission for the French Language are fighting a battle against the use of 'smartphone' instead of *le mobile multifonction* and *fibronique* for fibre optics.[29] Young people are reported to be embracing English, not just for cultural and educational reasons, but from economic necessity.

Demand for English is high when youth unemployment is particularly high and young people move abroad for work. In Greece, Portugal, Spain, Poland and Romania, many young people learn English so they can move abroad for work opportunities across Europe.

In 2016 there were 3.2 million EU citizens in the UK.[30] Between 2013 and 2015 there were 116,000 Spanish citizens resident in the UK, and around half were aged between 20 and 39 years old.[31] Similarly, there were 256,800 Romanians living in the UK between 2014 and 2016 and 90,700 (35 per cent) were estimated to be aged between 16 and 29 years old.[32] Just five per cent were estimated to be unemployed and five per cent studying.[33] English is the key for intra-European mobility and work.

'Parents have seen the need for their children to get on in life and they need English. They are willing to invest time and effort and money in their futures far more than they used to… they want their children to have a competitive edge and they need proof that their standard of English is a good one.'

Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal

'It's expensive to send your kids, but some parents make a big sacrifice to send them to English classes… Lots of parents are willing to pay for private lessons to improve their children's prospects in future.'

Justyna Martin MA, Director of Studies, Empik School Warsaw Centre (Junior), Poland

'English is a safety blanket for if you need to leave Spain.'

Alison Bancroft, Kids&Us, Barcelona, Spain

[28] http://ec.europa.eu/eurostat/statistics-explained/images/d/dd/Total_fertility_rate%2C_1960%E2%80%932015_%28live_births_per_woman%29_YB17.png

[29] Agence France-Presse (2018) Francophone: France prefers 'le mobile multifonction' to Smartphone. *The Guardian* 15 January 2018.

[30] http://ec.europa.eu/eurostat/statistics-explained/images/d/db/Non-national_population_by_group_of_citizenship%2C_1_January_2016_%28%C2%B9%29.png

[31] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/articles/livingabroad/migrationbetweenbritainandspain

[32] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/articles/livingabroad/dynamicsofmigrationbetweenbritainandtheeu2

[33] *Ibid.*

Internationalisation of families

From the interviews, another trend from this large movement of young people living outside of their home country was the internationalisation of family relationships. Young Europeans may migrate as a couple and have (or go on to have) children, who become fluent English speakers. In the UK, the most common country of birth for non-UK born mothers is now Poland (22,382 births to Polish mothers and 11,721 to Romanian mothers).[34] Having family outside of their parents' country of birth, and especially grandchildren who speak English better than their parents' mother tongue, increases the demand for grandparents to learn English. In Poland, the University of the Third Age has seen an increase in the number of people over 50 who want to learn English because they have family in the UK. In interviews, we heard about grandparents travelling from Poland, Portugal and Spain to provide childcare (particularly in UK school holidays). There is an increased demand from this older age group, who often have not previously learned English, or who have low proficiency levels, to learn English later in life for family reasons.

[34] https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/livebirths/bulletins/parentscountryofbirthenglandandwales/2016

Image: Senior man reading in library

Impact of the key population trends: young learners

Although it varies from country to country, a key dynamic operating in the overall demand for English is the fall in the number of people in the school-age population (generally six to 18).

Overall for the seven countries in this study, the population in these age groups over the ten-year forecast period falls by 3.6 per cent. This ranges from an increase of 0.6 per cent in France to a fall of 16 per cent in Portugal. This feeds directly through into the forecasts, with a 0.4 per cent increase over the ten years in the number of students learning English in French schools, to a fall of 11.7 per cent in Portugal.[35]

The change in the number of school students learning English is closely correlated to the demographic changes. In the seven countries, the numbers learning English fell by one million, from 31.8 million in 2015 to 30.8 million in 2025, with again a small increase in France and a reasonably large fall in Portugal.

While there is a fall in the overall number of students learning English, this differs across the three learning stages. There is a fall in primary and lower secondary and an increase in upper secondary (again primarily driven by demographic changes).

[35] A full explanation of the modelling used to derive the numbers in Table 2 is provided in Appendix C.

Table 1: Number of students learning English in state education, by country, 2015 and 2025 (millions)

Country	2015	2025	% change	% change (pa)
France	9.82	9.86	0.4%	0.0%
Greece	1.09	0.98	-9.6%	-1.0%
Italy	7.20	6.87	-4.6%	-0.5%
Poland	4.47	4.35	-2.7%	-0.3%
Portugal	0.87	0.77	-11.7%	-1.2%
Romania	2.34	2.17	-7.5%	-0.8%
Spain	6.02	5.81	-3.5%	-0.4%
Total	**31.8**	**30.8**	**-3.2%**	**-0.3%**

Table 2: Number of students learning English in state education, by education stage, 2015 and 2025 (millions)

Country	2015	2025	% change	% change (pa)
Primary	13.31	12.06	-9.4%	-1.0%
Lower Secondary	9.23	9.03	-2.2%	-0.2%
Upper Secondary	9.29	9.74	4.8%	0.5%
Total	**31.83**	**30.82**	**-3.2%**	**-0.3%**

Impact of the population trends: adult learners

Because of population change, along with the age and other factors, such as changing proficiency in English, the size of the 'potential' market will fall quite significantly between 2015 and 2025, from 172.5 million to 157.2 million (a fall of 8.8 per cent).

All seven countries see a fall in the potential adult market, the smallest fall being in Italy (-5.8 per cent) and the largest fall in Romania (-16 per cent).

The difference by country is a combination of the differences in population change, differences in current proficiency by age group, and the differences in the likely changes in proficiency from current levels (see Appendix C for a full explanation of the modelling approach used).

There are very marked differences by age group.

Younger age groups: there are very significant falls in the 'potential market' for the two under 55 age groups (15–34 and 35–54). This is a result of both population decreases for these age groups and the age effect of 'proficient' younger people, benefiting from improved state provision, who then move into these older age groups.

The oldest age group: we forecast a small increase in numbers potentially wanting to learn English – a combination of fewer proficient people moving into this age group, more people (as a result of an ageing population) and a reasonably large cohort effect, as older people have an increasing desire to learn English for interest, family reasons, and so forth.

Table 3: Market potential: number of people who might want to learn English, by country, 2015 and 2025 (millions)

Country	2015	2025	% change	% change (pa)
France	39.7	37.3	-6.1%	-0.6%
Greece	6.5	5.5	-15.7%	-1.7%
Italy	44.5	41.9	-5.8%	-0.6%
Poland	26.2	22.7	-13.2%	-1.4%
Portugal	7.7	7.0	-9.3%	-1.0%
Romania	14.0	11.7	-16.0%	-1.7%
Spain	33.9	31.1	-8.3%	-0.9%
Total	**172.5**	**157.2**	**-8.8%**	**-0.9%**

Table 4: Market Potential: Number of people who might want to learn English, by age group, 2015 and 2025 (millions)

Country	2015	2025	% change	% change (pa)
15-34	41.0	34.5	-15.7%	-1.7%
35-54	58.3	48.7	-16.4%	-1.8%
55+	73.2	74.0	1.1%	0.1%
Total	**172.5**	**157.2**	**-8.8%**	**-0.9%**

MACRO TRENDS

SOCIO-CULTURAL

‘The vast majority of [Greek children] attend English language classes after school… There are many small schools, however, and the quality varies.’

Dimitris Tolias, Center for Applied Linguistics and Language Studies. Hellenic American Union, Greece

English is a widely spoken second language. It has been estimated that there are 1.5 billion learners[36] across the world. In Europe, it is the most widely spoken foreign language in 19 of the 25 member states where it is not an official language (i.e. excluding the UK, Ireland and Malta).[37] In addition to the 527 million people who speak English as a first language[38] in 101 countries,[39] it is a global language, used as a shared or relay language for people in many countries.

Across Europe, we have seen that there is a trend of parents fuelling the demand for English. Younger parents (those under 40) have benefited from government initiatives that started in the 1980s or 1990s to improve English in schools. They understand that work and study prospects are improved by proficiency in English and want this advantage for their children. In many countries, parents pay for their children to attend after-school English classes to supplement what they learn in the mainstream state system.

There is a strong belief among parents that, when learning English, ‘the younger the better’. In Spain and Poland, there has been a huge increase in the number of private English classes, activities for pre-schoolers, and specialist providers entering the market, such as Kids&Us in Spain. Helen Doron English Learning Centres were mentioned by several interviewees in different countries – this franchise provider teaches children from 0 to 19 in 32 countries. Many other private companies and individuals provide sessions in kindergartens and private childcare settings. The cultural belief is that English is a must for children and it is a skill that parents are willing to invest in. Provision for the very young is normally private.

1.5bn

Estimated to be 1.5 billion English learners worldwide[36]

527m

people speak English as a first language in 101 countries[38]

Image: Early learning clock

[36] Ammon, U (2015) *The Status of the German Language in the World*, cited in Noack, R and Gamio, L (2015) The world's languages, in 7 maps and charts. *Washington Post* 23 April 2015. Available online at: https://www.washingtonpost.com/news/worldviews/wp/2015/04/23/the-worlds-languages-in-7-maps-and-charts/?utm_term=.c7342219767b

[37] Directorate-General for Communication (2012) *Europeans and their languages. Special Eurobarometer* 386.

[38] *Op cit.* Ammon, U (2015).

[39] Ethnologue. Languages of the world. Eighteenth edition. Available online at: www.ethnologue.com

English in a culturally globalised world

Outside of the work and education spheres there is an increasing globalisation of culture where English dominates television, film, online channels, gaming, the internet, social media and music.

The degree to which this happens varies. For example, in France and Italy, dubbing foreign content has historically been tied to localised and profitable media industries.[40] The rise of online streaming of video and television content, however, makes original English language content more easily available. Netflix, for example, delivers online video programming to 190 countries. In France, 387 television shows and 1,541 movies can be accessed on Netflix – with the majority being available in original-version English,[41] and in many countries (such as France, Spain and Greece) English-language films in the cinema in their original format (rather than dubbed) are increasingly available.

For teens and young people, lots of activities that have social currency take place in English – gaming, texting, vlogging, social media, chatrooms and YouTube. Polish teachers told us that students text each other in English. The popularity of HBO's *Game of Thrones* was mentioned in interviews in France, Greece, Spain and Romania. Culturally, the world is getting smaller and English is the dominant language in many spheres, particularly those using new technologies.

Image: School boy with VR glasses

'[People] are watching films in English, they're online. These days Romania is very internationalised, so most of them will have foreign friends. There will be a lot of use of English outside the workplace, in an informal context.'

Mark Percival, Business Writer, KPMG, Romania

[40] Abend-David, D (2014) *Media and Translation: An Interdisciplinary Approach.*

[41] https://www.finder.com/global-netflix-library-totals

Consumers demand personalisation

A strong cultural trend across the industrialised Western world is the personalisation and customisation of products and services. Consumers no longer want the 'standard one-size-fits-all' product. They expect services and products to be 'what I want, how I want it, and when I want it'.

The English language teaching market is not immune to this. This expectation jars with the common private English language school model of two or three classes per week, on regular days for three academic terms, and may explain some of the decline in the demand for adult classes in Spain and Portugal. Respondents from these countries did not believe the decline was the result of digital services replacing face-to-face teaching, but of wider factors.

Europeans are leading increasingly busy lives. Time is becoming more precious, as people juggle work and childcare, elderly care, continued professional training, etc. English learners are consumers who now want different products that include 'just-in-time learning' ('I have a presentation next week and need the vocabulary and phrases around X'), 'top-up learning' ('I'm proficient but haven't spoken in this context for years, so I need to practise'), or English for a specific purpose ('I'm going to work as a nurse in the UK').

Learning English competes with other priorities, and the English language teaching market needs to respond to this. In a survey carried out by UNESCO, ICDE, and StudyPortals, more than six in ten respondents gave 'improvement of career prospects' as the main reason for choosing distance learning whether digital or not.[42] Although distance learning can at times be the preferred mode of learning, the main driver behind participation in distance programmes is the notion that one can learn a skill flexibly while concentrating on career advancement.

[42] Owusu-Boampong, A and Holmberg, C (2015) IDEAL (Impact of Distance Education on Adult Learning) project – the potential. Report 3. Available online at: http://unesdoc.unesco.org/images/0023/002351/235171E.pdf

MACRO TRENDS

EDUCATIONAL

There is a trend of 'top-down' government policies and 'bottom-up' social demands increasing the demand for English. National education policies have introduced mandatory foreign language learning at a younger age and made it a compulsory subject for longer. Parents want English for their children as it has become an essential skill, teens and young adults want it for social currency, and older teens and adults want it for work and study necessity and opportunities. English is the foreign language learned by most students during primary and secondary education.[43] It is a mandatory foreign language in Greece, Italy, Portugal and Romania, but in other countries it is the de facto language where there is regional, school or parental choice.

Nearly all students (97.3 per cent) studied English during the entire period of lower secondary education in 2014. The percentage is lower in primary school (79.4 per cent) because, in some countries, foreign language learning is not part of the curriculum during the first years of school. In upper secondary education, on the other hand, the percentage is 85.2 per cent because students following vocational routes are less likely to study foreign languages (though there are Europe-wide initiatives to address this) and also because in upper secondary more foreign languages are on offer.[44]

Figure 5: Percentage of lower secondary school pupils learning English by country

Source: European Commission/EACEA/Eurydice (2017) Key Data on Teaching Languages at School in Europe – 2017 Edition. Eurydice Report. Luxembourg: Publications Office of the European Union.

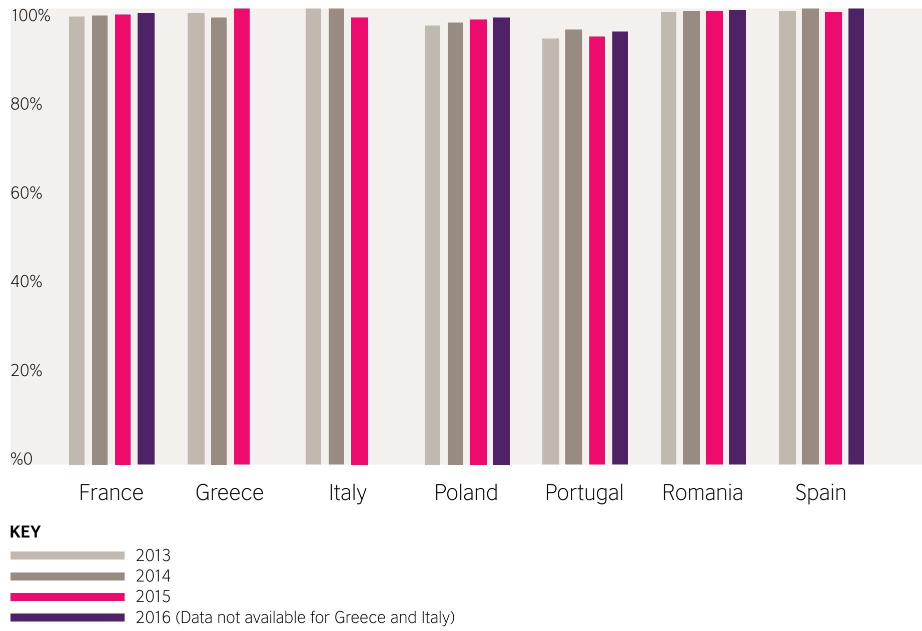
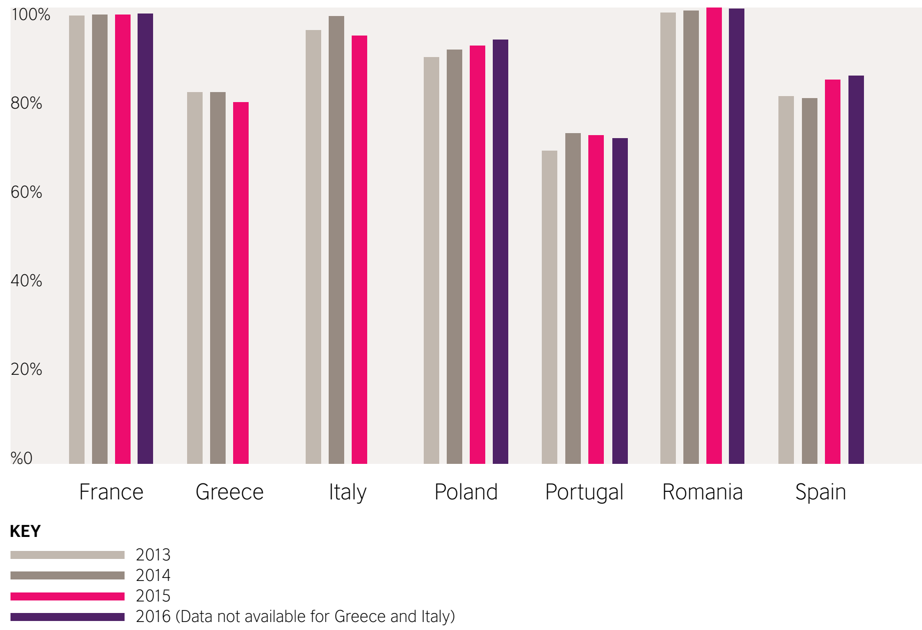


Figure 6: Percentage of upper secondary school pupils learning English by country

Source: European Commission/EACEA/Eurydice (2017) Key Data on Teaching Languages at School in Europe – 2017 Edition. Eurydice Report. Luxembourg: Publications Office of the European Union.



[43] *Op cit.* European Commission/EACEA/Eurydice (2017).

[44] *Ibid.*

In most countries, education authorities issue recommendations for the minimum instruction time for foreign languages. The number of recommended hours is lower in the lower grades in most countries. In Romania, children only receive 20 hours of English per year in their first years of primary school,[45] while the highest amount of time per year is in Spain at 85 hours. In secondary schools, the recommended minimum number of hours per academic year for compulsory foreign language teaching varies from 102 in Portugal to 176 in France.[46]

Those countries where foreign language teaching lasts longest (number of school years) do not necessarily have the highest total amount of instruction time, because the number of hours devoted per year are low.[47] Although great strides have been made in the number of years children study English in school, the share of teaching time dedicated to English, although increasing over time, remains modest at around five to ten per cent of total time. In Greece and Spain this is slightly higher, at 11.4 per cent and 10.8 per cent respectively.[48]

In Spain, children receive the longest instruction time (987 hours), followed by France (936 hours), and Italy (891 hours). Poland does not specify a minimum number of hours, and in Portugal and Romania the recommended hours are 617 and 520 hours respectively.[49] Where English is taught as the second foreign language, the number of hours is usually fewer.

Interviewees from the education sector reported that the number of contact minutes per week, and over the course of the entire school career, is often lower than what is needed to attain a good knowledge of English.

[45] *Ibid.*
[46] *Ibid.*, Figure E2.
[47] *Ibid.*
[48] *Ibid.*
[49] *Ibid.*, Figure E3.

Table 5: Trends in the recommended minimum number of hours of compulsory foreign language teaching during a notional year in primary and full-time compulsory general secondary education, 2010–11 and 2015–16

	Primary hours 2010–11	Primary hours 2015–16	Secondary hours 2010–11	Secondary hours 2015–16
France	43	54	176	176
Greece	70	66	98	90
Italy	79	79	139	139
Poland	61	*	113	113
Portugal	27	37	105	102
Romania	30	34	118	116
Spain	64	85	105	119
Average	**53**	**59**	**122**	**122**

*Compulsory subject with flexible time allocation.

KEY
Primary hours 2010–11
Primary hours 2015–16
Secondary hours 2010–11
Secondary hours 2015–16

Source: European Commission/EACEA/Eurydice (2017) *Key Data on Teaching Languages at School in Europe – 2017 Edition*. Eurydice Report. Luxembourg: Publications Office of the European Union.

'We are striving for all English teachers to be C2.'

Dr Thomaï Alexiou, Department of Theoretical and Applied Linguistics, School of English, Aristotle University of Thessaloniki, Greece

'We made the political decision to implement CLIL [Content and Language Integrated Learning] methodology as early as in primary school. With CLIL, you have the teaching of English as a subject and you also have subject teachers with good competence – C1 in upper secondary and B2 in primary. This means there are more teachers exposing students to languages in immersion classes. When becoming a CLIL teacher, one has to change the whole methodology of teaching – CLIL, after all, is a specific way of developing innovative classroom activities.'

Gisella Langé, Inspector for Foreign Languages, Ministry of Education, Italy

English and teachers' language qualifications

Although the trend is for children to start learning English earlier, at primary school it is sometimes taught by a general teacher rather than a specialist English language teacher. In Greece, Spain and Portugal only language specialists can teach English, and in Poland specialist English teachers are used after the third year of primary school. In Italy, general primary school teachers need to demonstrate their proficiency in English.

In secondary school, English teachers are language specialists, usually with a bachelor's or master's degree in English. In Spain, France, Italy, Portugal and Romania, a master's degree is required to teach in secondary school. However, the language skills of graduates can vary in different countries, and the length of time to acquire a language degree can vary, from three years in Poland to six years in Italy.

Combining language skills with subject matter

Used in an increasing number of countries, CLIL (content and language integrated learning) is a teaching method where a foreign language is used for teaching non-language school subjects (for example, science or geography). The aim is to improve the learner's language by increasing the opportunities for language learning and practice, without increasing the curriculum time and specialist language teacher time allocated to language learning.

The quantity, quality and frequency of CLIL programmes across the seven countries vary, with differing degrees of take-up. In Spain, where CLIL and bilingual education are well established in many regions, there is strong evidence of the positive impact of these programmes on children's language competences compared to standard foreign language programmes.[50]

Italy has taken a positive and ambitious step in introducing CLIL earlier in the education system.

CLIL provision is not homogeneous across the EU, and its ranking on the government's educational agenda is not as high in Portugal as it is in Italy, for example. In Portugal, while there are small-scale experimental programmes that teach certain subjects in French, English language CLIL-style classes are not offered at a national level nor incorporated in a public school syllabus.[51]

CLIL has been developed significantly in Spain since the early 1990s (particularly in and around Madrid, but also other regions).[52] In Italy, CLIL has been present in the education system since 2003, when a Reform Law made the programme mandatory for all upper secondary school pupils,[53] ensuring that the country could start falling into line with other European countries. In France, Poland and Portugal, only those students with a good level of English and good subject knowledge may study through CLIL. Greece, meanwhile, has started a pilot programme. As can be seen, CLIL provision varies across Europe, with factors such as school readiness and assessment influencing educational settings and goals.[54]

[50] Dobson, A, Pérez Murillo, MD and Johnstone, R (2010) *Bilingual Education Project Spain. Evaluation Report. Findings of the independent evaluation of the Bilingual Education Project Ministry of Education (Spain) and British Council (Spain).*

[51] Ravelo, LC (2014) Demystifying some possible limitations of CLIL (content and language integrated learning) in the EFL classroom. *Latin American Journal of Content and Language Integrated Learning* 7/2: 71–82. Available online at: http://laclil.unisabana.edu.co/index.php/LACLIL/article/view/4105/3581

[52] Manzano Vázquez, B (2015) CLIL in three Spanish Monolingual Communities: The Examples of Extremadura, Madrid and La Rioja. ELIA: *Estudios de Lingüística Inglesa Aplicada* 15. Available online at: https://www.researchgate.net/publication/297653278_CLIL_in_three_Spanish_Monolingual_Communities_The_Examples_of_Extremadura_Madrid_and_La_Rioja

[53] Cinganotto, L (2016) CLIL in Italy: A General Overview. *Latin American Journal of Content and Language Integrated Learning* 9/2: 374–400. Available online at: http://laclil.unisabana.edu.co/index.php/LACLIL/article/view/7177

[54] Ravelo, LC (2014) Demystifying some possible limitations of CLIL (content and language integrated learning) in the EFL classroom. *Latin American Journal of Content and Language Integrated Learning* 7/2: 71–82. Available online at: http://laclil.unisabana.edu.co/index.php/LACLIL/article/view/4105/3581

In some countries, teachers must have an additional qualification to teach CLIL, and an upper intermediate to advanced language proficiency level (B2 to C1). Other countries appoint CLIL teachers based on an individual authority's decision and the teacher's perceived readiness to teach a particular subject.[55] While in Spain there is strong evidence that bilingual schools and CLIL has a positive impact on language acquisition,[56] some critics of bilingual education continue to voice concerns about the impact on subject learning and equality of opportunity.[57]

There has been a trend towards increased investment in specialist English language teachers and improving the proficiency of subject specialists teaching in English in the CLIL programme. Some countries insist that CLIL teachers have a qualification in English as well as in their subject area (Spain, France, Italy, Romania and Poland), although the level of proficiency demanded can vary from B2 (vantage) to C2 (mastery). In some autonomous communities in Spain, teachers need to attend specific training courses on CLIL methodology. In France, CLIL teachers must pass an oral examination to demonstrate their ability to use the target foreign language in their specialist subject, and in Romania teachers must have attended a CLIL methodology course.

Alongside CLIL in the education system, the demand for bilingual schools has increased. In the Madrid area, almost half of state schools are bilingual. British and American Schools (where pupils follow the teaching style and curriculum of overseas schools) thrive in many major cities in Europe, and their intake is often very heavily skewed in favour of the national population. In Spain, an estimated 70 per cent of students in British Schools are from Spanish families, and over 50,000 pupils are receiving an education modelled on the UK system.

Tertiary education

It is common in some countries to study English as part of an undergraduate degree or for English (or another foreign language) to be an admission requirement. In Poland, students must pass English as part of their school leaving examination needed for university. Most universities in Spain have requirements about foreign language proficiency and provide their own language centres to support students achieve these. In Italy, undergraduate students must study a foreign language (unless they have met the language requirement beforehand) in order to graduate.

Even though there may be no requirement from the university to attain proficiency in English to graduate, many students will still want to have achieved a high level of English before graduating, to improve their employment prospects. In some degree courses the need for English is recognised and incorporated into the curriculum.

The importance of English is recognised in tertiary education, not only because it reflects employer demands and improves graduates' employment prospects, but in academia most leading journals are published in English – all of the top 50 journals are published in English on the Scimago Journal Rank (this ranks scientific journals by prestige, based on the citations their articles receive).[58] Outside of academia there is still a demand for English, particularly in global industries and sectors, where new information and influential papers are usually published in English.

'Even universities that teach the subject in question in Italian will ask for a certain level of English or a certification, because this means that you don't then have to attend the English courses. Every university, no matter what subject you are studying, has English as a subject, and you have to pass an exam. However, if you have a certificate, you can skip the exam, or at least the written part.'

Palmina La Rosa, Director, International House, Catania, Italy

'A significant number of my MA students found jobs abroad because they were graduates of a programme taught completely in English. They found very good jobs with great companies.'

Professor Octavian Roske, University of Bucharest, Romania

[55] Vilkanciené, L and Rozgiené, I (2017) CLIL Teacher Competences and Attitudes. *Sustainable Multilingualism* 11. Available online at: http://uki.vdu.lt/sm/index.php/sm/article/download/187/147

[56] Dobson, A, Pérez Murillo MD and Johnstone, R (2010) *Bilingual Education Report Spain: Evaluation Report.* Available online at: https://www.britishcouncil.es/en/partnerships/success-stories/bilingual

[57] Seikkula-Leino, J (2007) CLIL Learning: Achievement Levels and Affective Factors. *Language and Education* 21/4: 328–341.

[58] www.scimagojr.com/journalrank.php?category=0&area=0&year=2014&country=&order=sjr&min=0&min_type=cd

Number of Erasmus Plus students studying abroad in other European countries[61]

11,135	Italy
9,893	Spain
9,075	Poland
8,495	Romania
5,776	France
4,238	Portugal
3,907	Greece

The internationalisation of tertiary education

This has had, and continues to have, a positive impact on the demand for English in Europe. There are an estimated 70,000 undergraduate and graduate degree programmes taught across the world in English.[59] This includes degrees taught in English, in English-speaking countries (the USA, Canada, Australia, Ireland and the UK), as well as degrees taught in English (English-taught bachelor's degrees) in non-English-speaking countries. For example, Spain has over 400 degrees taught in English in 27 institutions, and Italy offers 230 degrees taught in English in 28 institutions.[60] Studying for a degree in English is an attractive option for many young people – it improves their employment opportunities and ability to work internationally.

The Erasmus+ Programme is popular among young people, allowing them to study in another European country. In 2015, Italy sent 11,135 young people to another country, Spain 9,893, Poland 9,075, Romania 8,495, France 5,776, Portugal 4,238 and Greece 3,907.[61] Many of our interviewees in the state and private language sectors mentioned that students needed a good level of English to take part in the Erasmus+ Programme, either to study in an English-speaking country or to take a course taught in English in a non-English-speaking country.

Image: Erasmus+ student Adwoa

[59] https://www.timeshighereducation.com/student/news/find-every-english-taught-degree-top-university-interactive-map

[60] https://www.timeshighereducation.com/student/news/find-every-english-taught-degree-top-university-interactive-map#survey-answer

[61] http://ec.europa.eu/programmes/erasmus-plus/resources/documents/erasmus-annual-report-2016-statistical-annex_en

The rise and proliferation of English-taught bachelor's degrees

To attract foreign students (and aided by funding aimed at the internationalisation of European education systems), an increasing number of higher education institutions in the EU are offering taught degrees entirely in English, with the number of English-taught bachelor's degrees (ETBs) having doubled since 2012. These degrees do not necessarily provide formal instruction in English as a language, but students are taught in English so that their day-to-day exposure to and use of English is increased.

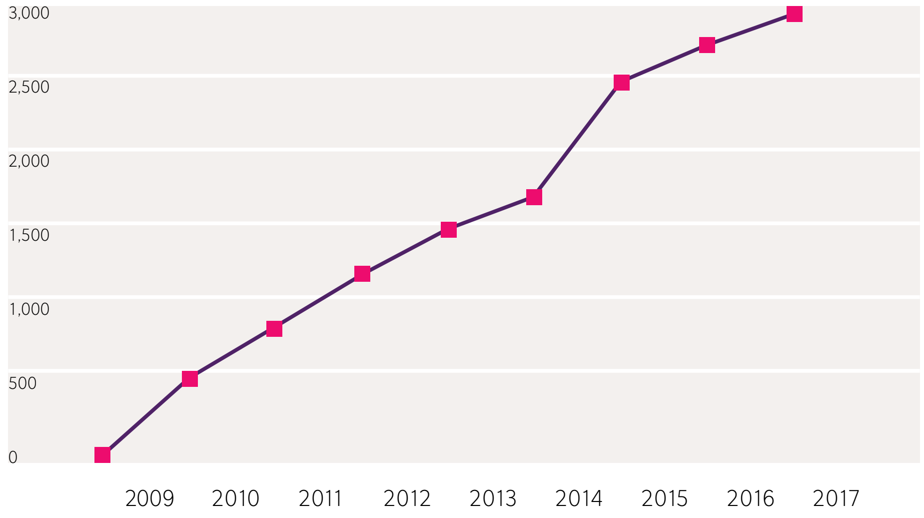


Figure 7: Growth of English-taught bachelor's degree in Europe 2009-17

Source: Sandström, A-M and Neghina, C (2017) English-taught bachelor's programmes: Internationalising European higher education. Available online at: https://www.studyportals.com/wp-content/uploads/2017/09/EAIE-StudyPortals-English-taught-bachelor-programmes-Europe.pdf

In some countries, higher education institutes teach in English with the explicit aim of attracting students from other countries. Examples include degrees in medicine in Poland, attracting students from across Europe as their fees are lower, and Greek universities attracting students from the Balkans.

The most popular subject areas for ETBs are business and management, and engineering and technology, reflecting the globalisation and internationalisation of these sectors.

The trend for ETB provision is set to expand.[62] However, the degrees on offer will also have to become more specialised as demand grows for education catering to a more diversified and international student body. Growth is not restricted to undergraduate degrees. There has also been a huge increase in the number of postgraduate degrees taught in English – the total number has increased by 42 per cent since 2011.[63]

[62] ICEF Monitor (2017) Fifty-fold increase in English-taught bachelor's degrees in Europe. See http://monitor.icef.com/2017/09/fifty-fold-increase-english-taught-bachelors-degrees-europe/

[63] www.iie.org/Research-and-Publications/Publications-and-Reports/IIE-Bookstore/English-Language-Masters-Briefing-Paper-2013-Update

Table 6: Summary of numbers relating to English-taught bachelor degrees by country

Data taken from Sandström, A-M and Neghina, C (2017) *op cit.*

Country	Total number of higher education institutes in the country	Number of students	Number of international students	Number of HEIs offering ETBs	ETBs	Number of ETBs (100 per cent English)
France	323	1.4 million	260,000	41	95	82
Italy	215	1.8 million	70,000 (4%)	34	125	107
Spain	81	1.8 million	60,000 (3%)	30	241	219
Portugal	133 (public and private)	N/A	N/A	N/A	N/A	N/A
Greece	49	360,000	25,000 (7%)	12	161	161
Romania	90	1 million	17,000 (2%)	8	32	32
Poland	282	1.469 million	46,000 (3%)	40	131	131

The evolving role of the private sector

The private English language teaching (ELT) market in many countries is made up of hundreds of small independent schools or chains, often located within a town, region or country – for example, Speak Up has over 25 centres in Poland. Internationalisation and franchising in the private English language teaching market is a growing trend, where global franchises are operating across countries and borders. Wall Street English has 70 centres in Italy, 49 in France, 34 in Portugal and two in Spain. Berlitz operates in France, Greece, Italy, Poland, Portugal and Spain. Many franchise operators are actively recruiting for investors in growing markets (Speak Up, Wall Street English, Direct English, Berlitz). There is no reliable source of data for this sector. Figure 8 brings together results from a variety of sources (sector associations, directories, English language school search websites, etc) in an attempt to estimate the number of individual language schools for each country (for chains with multiple outlets, each school has been counted).

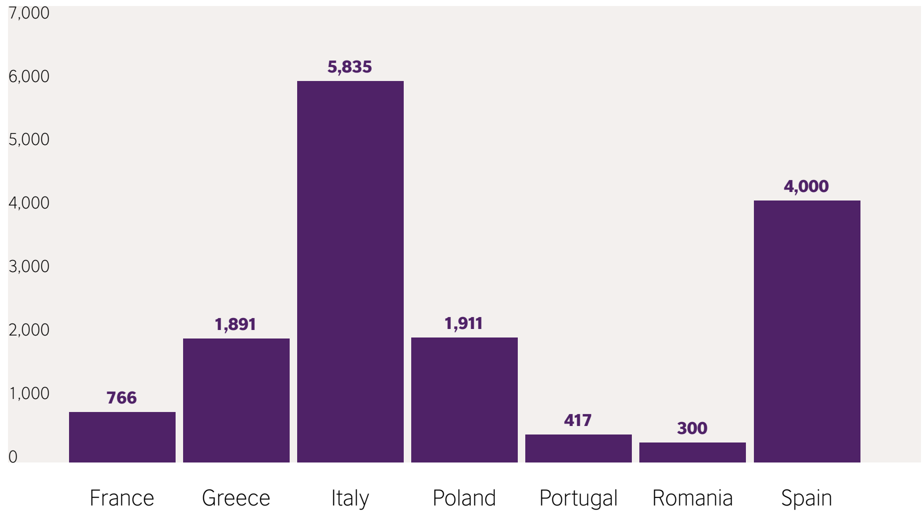


Figure 8: Estimated number of private English language schools by country

Interviewees suggested that the private language school sector thrived because many school systems still take an old-fashioned approach, emphasising grammar and formal English, rather than teaching students to speak the language confidently, with good listening skills and the ability to use appropriate language styles for different contexts.

In the private language teaching sector, class sizes tend to be smaller and streamed by ability and age. Private sector teachers tend to make more use of English in the classroom and encourage spoken communication set in 'real-life' situations.

‘In France there is an analytical approach to learning the language of schooling, i.e. French, which some teachers build on when teaching foreign languages. There are not many hours allocated to the pedagogy of foreign language teaching and learning in teacher training courses.’

Gail Ellis, Adviser, Young Learners and Quality, British Council, France

‘They [learners] don’t want ‘old school’ teaching, like explaining grammar … they want to take it to the next level, very communicative teaching, conversation …’.

Michal Zajac, Co-owner, Lublin Royal School of English, Lublin, Poland

Private language schools were often described as shoring up the mainstream school system by addressing many of its shortcomings (large mixed ability classes, teaching to the curriculum), and employing different and more modern methodological approaches. This is seen as more useful in preparing students for a professional career later in life and giving them confidence for fluency activation.

Private English language schools often employ a mixed staff of home (non-native speaker) and native English speakers, and can offer other facilities (libraries, magazines, online self-study and digital activities) in English. In Spain, Portugal, Poland and Greece, many experts believed that a good level of proficiency in English was often underpinned by attending a private language school. In this respect, in some countries (Spain, Italy and Poland), it is the norm to attend a private language school for many years (from primary school until late teens) to achieve a good standard of English for further study or employment purposes.

In Spain and Portugal, interviewees from private English language schools reflected on how the balance between adult and younger learners had changed. The children’s market was strong but the adult market had declined, particularly for courses that needed a commitment of attending two or three times a week over an academic year. In Poland, Romania and France, evening courses for adults were still buoyant.

Native English speakers versus home (non-native speaker) teachers

Before the fall of the Communist regimes in Poland and Romania, English was rarely taught in schools and universities, so it was unusual (as well as difficult) for native English speakers to work there. Spain, Greece, Italy and Portugal have historically attracted large numbers of qualified (and unqualified) native speakers of English, who were seen as best placed to teach in flourishing markets in the 1980s and 1990s. Since the early 20th century, France has had a language assistant programme where native speaker students work in French schools.[64]

From interviews with representatives from the private language teaching sector and English teacher training departments in universities, the view in the 1980s that the best English teachers were always native speakers has changed. This is because of various factors. In Poland, Romania, Greece and Spain, the levels of proficiency required of specialist English teachers in the public school systems have improved dramatically. Many countries (Spain, Greece and Poland) now expect English language graduates, and master's graduates, to be C2 (mastery). In some countries a 'home' or national teacher is seen as having a better insight into the difficulties and challenges of learning English. Teacher training experts talked about specialist language teachers having a much better understanding of how to teach languages effectively and of language acquisition than in the past. And, generally, teachers are now much better supported and resourced – there is now much greater access to English both formally (text books, online resources) and informally (films, television, music, online, etc.).

There is, however, still demand for native speakers. In Portugal, for example, experts said that some learners worried that Portuguese teachers might have an accent and that they preferred native speakers. In the private English language teaching sector, native speakers are used extensively, particularly in the business sector. Native speakers are sometimes perceived as being better at counteracting some of the shortcomings of the school system, to produce fluent and confident learners who can communicate well in a wide range of contexts. But the expectation from the private language sector and employers is that simply being a native speaker is not enough – there is now, and rightly so, an increasing recognition that good linguistic as well as pedagogical skills are required to teach English well, and native speakers need these as much as home teachers.

In some countries in the past, where native English speakers were plentiful, they had an advantage over home teachers because they provided the only opportunity for a student to engage with a native speaker or to access English. This has changed with technology – the internet, social media, the globalisation of culture, and the ability to download films, television, print and online media.

[64] www.ciep.fr/en/foreign-language-assistants-in-france/programme-history

International English exams not reflecting what employers need to test

Many of the employers interviewed did not use the well-known examinations and certificates to assess ability in English, preferring instead to use in-house assessment or third-party assessment to assess task or skill based linguistic competence. This was because a pass grade in many of even the high-proficiency examinations did not always guarantee the interviewee's ability to use English confidently in a sector-specific environment.

No employer interviewed was using the recognised English certificates for recruitment or assessment purposes. The common approach in the private sector was to interview in English or set tasks in English (presentations, written proposals, etc.), which were assessed in-house as part of the recruitment process.

To fill the English competence gap in their staff, in some countries (Spain, Portugal and Italy), companies contract private language schools or individual teachers to provide bespoke courses for their employees (and, more rarely, pay for staff to study intensively abroad). Firms know that their staff often need 'niche' and specialised courses that address how they need to use English in their day-to-day work, their particular language needs, and the specialised English used in their sector. These courses are often short, specific and provided on a one-to-one or small group basis, so they address the issues effectively.

Image: Teachers talking

TECHNOLOGICAL AND DIGITAL

'We still believe that the teacher, the coach, the tutor, whatever you want to call them... they will be there. The flipped classroom is something that is already happening. Digitalisation will indeed be there. Students will learn faster, but there will be a need to talk to real people.'

Giuseppe Romagnoli, VICTORIA International House Ancona, Jesi, Italy

Digital tools have been used in language learning for many years. What is available now has evolved as technological developments, such as the widespread availability of mobile internet and machine learning. These have allowed developers to deliver products that are mobile and flexible. Digital platforms now frequently offer human contact (such as digital tutoring or platforms that allow 'penpals' or 'buddies' to connect online). What the market currently lacks is a digital solution that covers all the essential stages of learning (from grammar, vocabulary, pronunciation and conversation to assessment and feedback), which is successful and replicable on a mass scale. Separately, however, many of the elements taught in a traditional face-to-face learning process (such as vocabulary, grammar and pronunciation) can be taught and practised digitally and at the learner's own pace and convenience. In this way, digital tools can be used to enhance face-to-face learning.

There are now a large number and range of products and services on offer, and the sector continues to grow and develop. Ambient Insight[65] estimates the global annual growth for digital English language learning products at six per cent and revenues of $3.8 billion by 2020, up from $2.8 billion in 2015.

Four categories of digital English language learning products have been identified:

1. **Digital reference-ware** (e-textbooks, e-phrasebooks, audio books, digital videos, test prep and digital translation dictionaries).

   These are dominated by well-known providers and publishers (such as Macmillan or Pearson) but also exist more locally for exam preparation. Resources are designed to be used alongside standard coursebooks or alone. Pearson's 'ResultsPlus' tool analyses students' performance in exams and advises teachers on what areas of teaching could benefit from additional emphasis. Cambridge English offers a range of digital materials (worksheets, vocabulary lists, quizzes and sample papers).

2. **Mobile learning apps and services**

   Engaging content, gamification and analytics-enabled customisation (this is when the application or programme keeps a log of the learner's strengths, weaknesses and other characteristics based on past results, and then builds content around the individual learners' needs) have made mobile and web apps and services successful around the globe. User numbers are huge – there are a claimed 200 million registered users on Duolingo[66] and one million Babbel subscribers.[67] Apps can be used for ad-hoc purposes (for example, basic English to understand signs on a holiday) or longer-term objectives (preparing to emigrate). Traditionally seen as 'vocabulary trainers', they are now moving into the business and corporate space, providing bespoke company-tailored content and issuing certificates.[68] Babbel B2B is a digital training package aimed at companies to give employees as a 'perk'. The package comes with analytic tools to allow HR directors to monitor the most popular lessons.

   Digital language learning providers often emphasise to learners that they provide more efficient language learning. However, studies measuring the results and outcomes of mobile learning apps and services are scarce. Babbel's 2016 Efficacy Study, conducted on a sample of 325 Spanish-learning Babbel users, found that 21 hours of study across a period of two months was the equivalent of one semester of Spanish language teaching in a face-to-face setting.[69] The study was conducted by providing Spanish language lessons through the Babbel platform and comparing a pre-study language placement test to post-study test results.

   Another major mobile app service, Duolingo, has made the use of 'corpus principles' one of its differentiating factors (using 'real world' examples of text rather than 'invented' text often found in conventional text books). When DuoLingo partnered with media outlets such as CNN and Buzzfeed to translate high volumes of articles through its user community (Portuguese and Spanish

[65] www.ambientinsight.com/Reports/DigitalEnglish.aspx

[66] https://expandedramblings.com/index.php/duolingo-facts-statistics/

[67] http://tech.eu/brief/berlin-based-language-learning-app-maker-babbel-hits-1-million-paying-customers/

[68] See for example McGraw-Hill Certification offered by Busuu, or Duolingo's English Test for Business.

[69] Vesselinov, R and Grego, J (2016) *The Babbel Efficacy Study*. Available online at: https://press.babbel.com/en/releases/downloads/Babbel-Efficacy-Study.pdf

speakers learning English by translating articles), the crowdsourced work meant that the community of learners received phrases and texts that they would encounter in the real world.[70] Duolingo also use chatbots to simulate a variety of experiences (such as a taxi ride or a shop visit) to expose the learner to different language and situations.

3. Self-paced e-learning (off-the-shelf courseware)

This offers maximum flexibility and is aimed at learners who want to improve their skills or learn certain types of English. Berlitz's CyberTeachers or Rosetta Stone allow the learner to access course materials at any time and on any device. Many packages incorporate a 'live' or interactive element to improve learner motivation. Pitman English distance learning provides a choice of different 'modules' based on what specific subjects the student wants to tackle (for example, talking about sports, art or world news).[71] The learner receives 40 continuous professional development points and a Pitman Training certificate.

Although the self-paced learning can be efficient for learners who are self-motivated and want materials they can access whenever they want and wherever they want, learner motivation is one of the principal challenges of attaining positive learner outcomes. To overcome this, France-based English lesson provider Gymglish provides self-paced elements (daily content is delivered to the user's email, although it is up to them whether they participate in the lesson), but it also offers the option to get in touch with a pedagogical team to ask questions.[72]

4. Collaboration-based learning (flexible live online classes and live online tutoring)

Busuu is a social network for learning languages. It offers free independent learning through a website and app, and access to a network of native speakers. The collaboration element is based on 'every user of Busuu is also a tutor', and supply and demand for languages are adjusted via internal algorithms that ensure a balanced flow of inter-user conversations.

MOOCs (massive online open course) are usually developed with universities or other education institutions. There is usually one main lecturer, and learners complete tasks and discuss them with others on the MOOC's forums. Premium options offer students the option of accessing the course material indefinitely and obtaining 'micro-accreditation'. The partnership between FutureLearn and the British Council uses actors and Shakespeare experts around the world to provide a free course to learners in the world of the author by exploring common themes across five plays.[73] Whether students choose to simply watch the courses or take part in the in-course assessments often depends on time, assessment requirements and levels of motivation.

Take up of MOOC style courses for exam preparation has been high in the case of 'Understanding IELTS', a collaboration between digital education platform FutureLearn and the British Council. More than 200,000 learners enrolled and there were over 85,000 active learners during its first week. While it was aimed at learners taking the IELTS test, it also offered general tips on improving knowledge and proficiency. A significant proportion of learners stated they enrolled to learn flexibly and hear examples of spoken English from native speakers, and over 60% of respondents to the post-course survey said that, as a result of the MOOC, they had either booked or intended to book, an IELTS test.[74]

Examples of collaborative software and websites that provide screen-to-screen contact with real people are Verbling, a digital tutoring platform where learners can take lessons with a professional teacher, advertised to be available 24/7,and Fluentify, a tutoring programme that emphasises personalised learning plans and access to native speakers of English.

'It's one thing to have a lot of resources at your disposal, and another thing entirely to actually learn and retain.'

Benjamin Levy, co-Founder and CEO of Gymglish

[70] Olson, P (2013) Language App Duolingo To Translate More Sites After Buzzfeed And CNN. Forbes 13 November 2013. Available online at: https://www.forbes.com/sites/parmyolson/2013/11/13/language-app-duolingo-to-translate-more-sites-after-buzzfeed-and-cnn/z

[71] https://www.pitman-training.com/our-courses/career-development/learn-english

[72] https://www.gymglish.com/en/english

[73] https://www.futurelearn.com/courses/explore-english-shakespeare

[74] British Council – Understanding IELTS – Post-Course Summary.

'People like to certify their language skills. There are obviously some more "high-stakes" examinations out there, but some people may not have the time or money to undergo this kind of testing. People are looking for other forms of certification and we are able to create a co-branded certificate that is earned following a bespoke, adaptive test which confirms one's level of English within 15 minutes.'

Bernhard Niesner, CEO, Busuu, London, UK

It is clear that a wide variety of digital tools already exist and are being developed and used both independently and together with face-to-face learning. However, the challenge of knitting together combinations of different digital and face-to-face interventions into a personalised and seamless customer learning journey, which delivers effective learning, remains to be successfully resolved.

Personalisation

Digital teaching has the additional advantage of data-capture-facilitated personalisation. The programme or app can 'learn' what mistakes the student is making (or what they find easy) and tailor its content accordingly. In a traditional classroom, the teacher may not be able to monitor the progress of every student; capturing data around the individual learning process and how learners master concepts over time can facilitate a quicker and more robust route to fluency and learning.[75] This development reflects the wider consumer trend of wanting products or services tailored 'just for me'. Potential future developments may result in digital learning increasing its advantage in this respect.

Personalisation in the digital market often means adaptive learning (lessons are adjusted for the learner's level and ability to learn or memorise). But personalisation is also a core component of digitally delivered or online tutoring, where verified tutors (often native speakers) are provided through Skype or another platform and at an affordable price. Online tutoring is fast becoming the norm and is especially popular with learners who do not want to, or cannot, participate in classroom-based lessons.

Digital accreditation

Digital providers are expanding their offer to include accreditation. These certificates may not serve the same function as CEFR-based awards, but they have the advantage of being able to test and award a certificate on request (rather than waiting for an examination date), and can be designed for niche areas such as medical or business English. Babbel currently offers an online assessment powered by Cambridge English, which provides evidence of learners' progress from level A1 (beginner) to B1 (intermediate).[76]

Increasingly, educational institutions and employers are interested in digital provision that can test and accredit, particularly in niche areas or after short courses. Digital providers are responding.

'We launched the test about a year ago and we currently have about 250 institutions that accept the scores. Most are either universities, boarding schools or business partners. For example, Uber – if you are an English speaker in a foreign language and want to ensure that your driver speaks English, you can pay a small premium to get a certified Uber driver. That Uber driver also gets a small bonus for being qualified and they use the Duolingo English test as the way of qualifying.'.

Burr Settles, Staff Scientist and Software Engineer, Duolingo, USA

[75] European Commission (2014). *Report to the European Commission on New modes of learning and teaching in Higher Education*. High Level Group on the Modernisation of Higher Education. Available online at: http://ec.europa.eu/dgs/education_culture/repository/education/library/reports/modernisation-universities_en.pdf

[76] Babbel and Cambridge English Set the Pace in Online Language Assessment. Available online at: https://press.babbel.com/en/releases/2017-08-16-Babbel-and-Cambridge-English-Set-the-Pace-in-On-line-Language-Assessment.html

In addition to micro accreditation capabilities, mobile app services can make assessments more accessible to learners who want to postpone or are unable to sit more expensive or formal assessments.

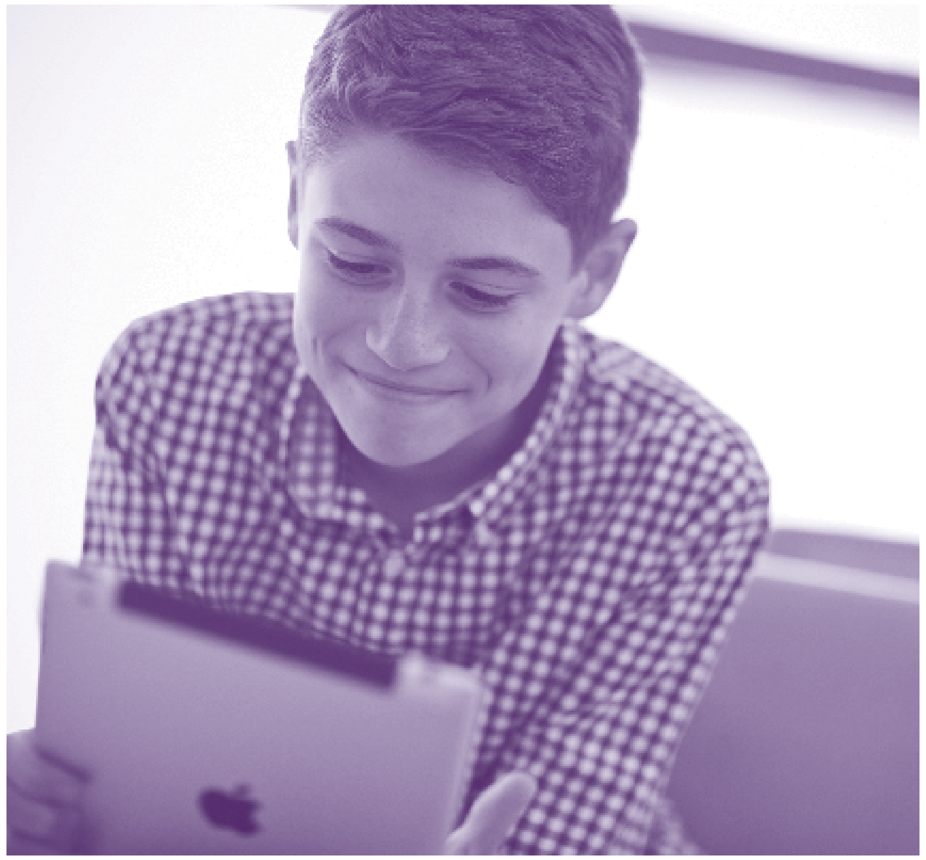
Flexibility for the employer market

Employees often need to top up their English or learn specific English for a work-related context or event. In some countries, employers provide in-house training in small groups during the working day, but these can be difficult to arrange and difficult to catch up with if a session is missed. Digital providers have seen the opportunity to develop self-paced online products and courses that employees can follow when it is convenient to them and at their own pace.

Engaging the shy or rusty learner

Digital products meet the needs of less confident learners who do not want to be in a classroom or face-to-face environment, or for those for whom it has been a long time since they learned English. As interest in learning English increases in older age groups, developments in this area may thrive.

Image: Boy using tablet



'Digital technology will open up the market as well, and it will be especially interesting for business classes. You've got very busy people, and it can be difficult to organise meetings around their schedules. There's no need for face-to-face meetings. Since a lot of these professionals will be using and speaking English online, it's better to deliver the teaching online as well, because that is the actual context in which they work.'

Russell Stannard, Educational Technologist and Consultant, London, UK

'A lot of people who aren't experienced language learners may associate learning languages with failure because they didn't succeed in learning a language at primary or secondary school. They may associate it with fear and embarrassment, so there is an element where an app where you speak into your phone could perhaps be ... at the lower levels, an easier, and more comfortable way to learn a language. At the moment, however, there is no chatbot that's good enough to give you the sense that you're having a real conversation.'

Zachary Sporn, Babbel, Berlin, Germany

Digital ELT from an assessment perspective

Digital innovation is also having a significant impact on language assessment. Professor Barry O'Sullivan, Head of Assessment Research and Development at the British Council, distinguishes between two different types of language assessment: assessment *of* learning, and assessment *for* learning and says that technology is changing how we approach these two different areas. Although fast developing in Asia and North America, we can expect to see technology finding its way into language testing in Europe in the near future.

- **Assessment of learning:** this has traditionally been the dominant use of technology. Both the content learners use to prepare for tests and the tests themselves are delivered online. Examination providers have been incorporating automated elements to the scoring side of the assessment for a long time. For example, ETS, the owners of the TOEFL system, have introduced an automated second rating of their writing papers and developed a working tutor system for their speaking papers. Similarly, Pearson's PTE Academic Test uses automated and machine scoring in the speaking and writing sections of its assessment. Although this scoring system is based on correctness and quality of the response, more recent developments in the field of deep learning mean that the ability of automated systems to deliver more nuanced scoring for more 'high stakes' examinations is improving rapidly.[77]

  Automated components could soon make their way into formal assessment of pupils in mainstream state education. In China, iFLYTEK (a major educational tech company) plan to start delivering auto rating of speaking and writing at the Zhongkao (senior high school entrance examination) and Gaokao (equivalent of A-Levels) examinations in the coming year.

  There is also significant interest in scenario-based testing. This assesses participants in a theme-based environment, such as having to fact check a resource to formulate conclusions about a particular topic. This type of test format was originally developed in the UK in the 1980s and remains a popular form of testing. The rapid pace of technological advancements, however, means that the scenario-based format could soon be enhanced by the addition of technology, to develop and deliver the content of the test, as well as scoring it.

- **Assessment for learning:** formative assessment (done during the learning process, to provide feedback and identify learner strengths and weaknesses) is also an area of interest for the organisations mentioned above, as well as major providers such as Cambridge English and Benesse in Japan.

  Although currently focused on the automated generation of feedback for writing assignments, it is expected that major players will soon also focus on providing feedback on speech and speaking exercises. Liulishuo, a China-based education company, currently has around 30 million registered users and 600,000 paying customers. It has implemented a digital tutoring system and is exploring the IELTS market, with the aim of developing an IELTS Practice mobile app offering personalised feedback.

  A collaboration between China's iFlyTek (sometimes referred to as the Chinese version of Siri) and major language school group New Oriental will see a new AI-powered product, which will assist in the marking of students' essays in English by having learners upload a photograph of their work to the platform.[78]

[77] Pearson PTE Academic Test – How is the test scored? Available online at: https://pearsonpte.com/the-test/about-our-scores/how-is-the-test-scored/

[78] Soo, Z (2017) Teaching Aid: Alibaba tests AI system that can spot errors in written Chinese essays. *South China Morning Post* 7 December 2017. Available online at: http://www.scmp.com/tech/innovation/article/2123204/teaching-aid-alibaba-tests-ai-system-can-spot-errors-written-chinese

Digital natives

Anyone born during the last 20 years is a 'digital native' – that is digital technology has always been part of their world. This age group uses technology with ease and expects to use it in all areas of their lives, including school. Increasingly, teachers themselves are digital natives and may in many respects be keener than older teachers to use technology in the classroom. This expectation from students and digital-native teachers will also push up the demand for, and enthusiasm to use, more digital technology in language teaching and learning.

Digital to deliver niche and organisation-specific content

There is a growing trend of schools and teaching centres building their own digital platforms to deliver tailor-made modules aimed at a specific client audience. For example, Romania's SNG (National School of Registrars) partnered with the British Council in summer 2016 to deliver an online 'English for Legal Purposes' course that is accessed through the school's website.[79] The initiative was aimed at providing Romanian registrars with the opportunity to enhance their professional skills by equipping them with an understanding of legal English.

The limitations of digital provision

Babbel and the 'language learning social network' Busuu target learners whose level of English is somewhere between A1 (complete beginners) and B2 (intermediate). It is possible to deliver advanced learner content through subscription-based software; both providers agree that higher levels require face-to-face guidance to facilitate writing longer texts or having more nuanced conversations.

The demand for a more digital model (where a real person is not involved) in language learning is still counteracted by the need for 'screen-to-screen' interaction and opportunities to speak with real people on screen, even if they are remote. This is especially relevant where the learner is at an advanced level and needs more nuanced supervision or guidance to correct subtle errors. These are the trends that will shape the future demand for English language teaching and learning. In the next chapter we discuss the overall conclusions.

'Most of our schools are well equipped as far as new technology is concerned. Students who are digital natives also demand the use of technology from their teachers, and teachers are usually open to exploring uses of technology, but some of them have to be pushed by students. It results in much livelier classes than they used to have a while ago. This includes the use of mobile, video, blogging, and others.'

Alberto Gaspar, President, Portuguese Association of English Teachers

'I struggle to see how AI or robots would be able to deliver emotional intelligence and humanism. I want to continue investing in teachers as coaches, as guides, in addition to investing in technology.'

Giuseppe Romagnoli, VICTORIA International House
Ancona, Jesi, Italy

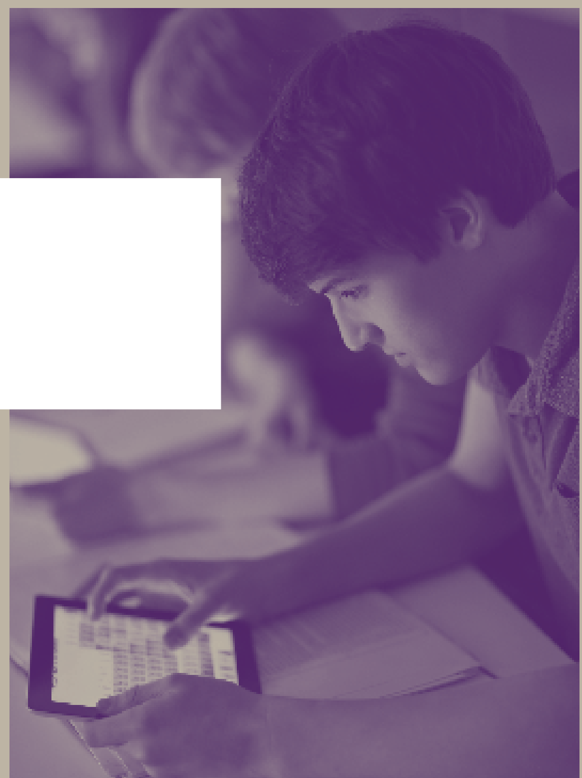
[79] Available online at://instruire.grefieri.ro/

'Apps don't have the capacity to replace face-to-face teaching at higher levels – not at the moment. It's not a limit of technology, it's a question of pedagogy. No one has figured out how to improve someone's skills at the upper intermediate or advanced levels, or how to create content at a higher level that is engaging and truly self-directed.'

Zachary Sporn, Babbel, Berlin, Germany

Image: Integrated circuit

20



3

THE DEMAND FOR ENGLISH IN EUROPE 2025 AND BEYOND

OVERALL CONCLUSIONS: THE FUTURE DEMAND FOR ENGLISH IN EUROPE – 2025 AND BEYOND

Demographic shrinkage of demand

Because of population change, along with the age and cohort effects, the size of the 'potential' market in the seven European countries will fall quite significantly between 2015 and 2025, from 172.5 million to 157.2 million (a fall of 8.8 per cent or 15.3 million).

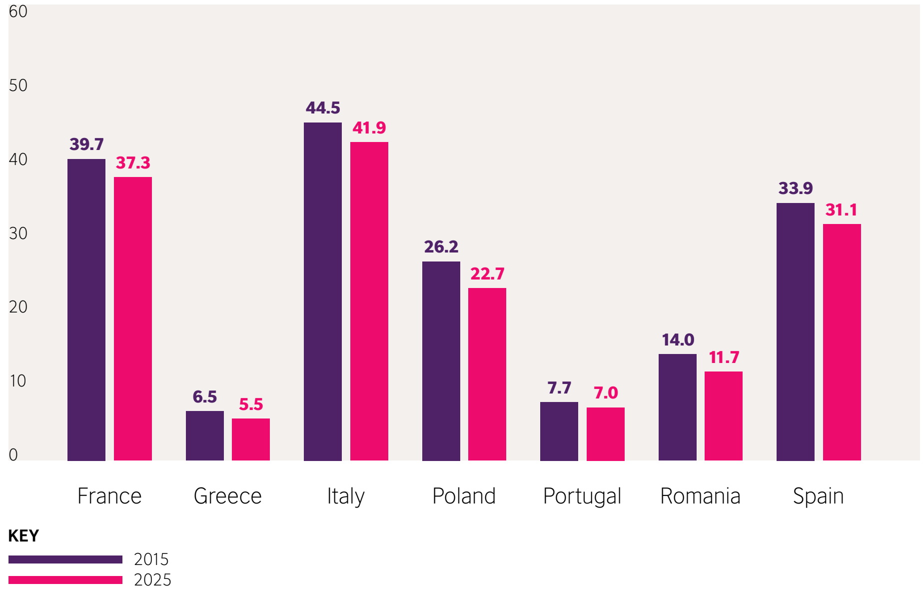
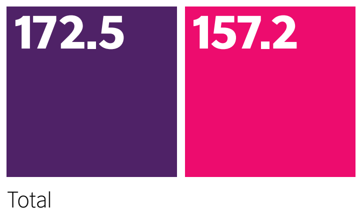


Figure 9: Number of potential English learners by country, 2015 and 2025 (millions)



Economic and cultural bolstering of demand

However, as we observed earlier, this demographically driven fall in the supply of potential students for English language teaching will be offset by several factors. There is near-universal acceptance throughout the literature review and the qualitative research undertaken especially for this report that the demand for English language teaching among the smaller future population will increase.

- English will remain the chosen second language for most Europeans for a great variety of factors such as:
  - its role as the lingua franca in business, academia, diplomacy, media, social media and technology
  - ease of learning
  - its role as a 'relay' language. Perhaps more importantly, for the time horizon covered by this report, English will be the relay language for Europeans seeking to engage with important emerging economies such as China and India.
- Having a second language (especially English, for the reasons outlined above) is increasingly important for securing employment and/or increasing employment prospects.
- The amount of cultural output (in both traditional and new media) in English makes it an attractive language to learn. This also increases familiarity with English, so making it easier to learn.
- In terms of education reforms having a measurable impact, the timeframe we are looking at in this report is short. Although proficiency levels are likely to improve, it seems unlikely that state education will improve sufficiently by 2025 to significantly increase the numbers of children leaving school with the proficiency levels required by employers. Educational reforms can take a whole school career to take effect, and other challenges faced in state education (such as large and mixed classes) need to be addressed, to meet ever increasing employer expectations in terms of proficiency.
- The age profile of those learning English will transform over time. With smaller numbers of children in the population, the average age of those learning English looks set to increase. Beyond the demographic effects, there are other reasons to expect older people to study English in larger numbers:
  - the demand for adult English language learning to improve and top up those skills learned at school looks set to increase
  - the formation of family relationships across international borders means that older people have an incentive to learn English to aid communication with in-laws and grandchildren from another country
  - the increased recognition of the 'third age' as a time for personal development, and the trend towards lifelong learning, suggest greater uptake of many forms of learning, including language learning, later in life
  - with a larger proportion of the adult population having some proficiency in English in future, it is also likely that the demand for 'top-up' tuition throughout life will increase.

Technological and 'consumer' transformation of demand

Demographic, economic and cultural trends suggest a transformation in the size, shape and composition of the market for English language teaching and learning to 2025. However, perhaps the biggest changes and challenges in future provision comes from the combined effects of the technological and 'consumer' trends observed in the literature review and desk research.

We have outlined in some detail a range of technological developments that will alter the way in which English language skills are taught and assessed. In the time period for this report we are not forecasting some of the more outlandish predictions that can be seen on this subject, such as the wholesale substitution of face-to-face learning with artificially intelligent agents, or accurate, instantaneous translation obviating the need for second language skills altogether.

Rather, what strikes us as the most potentially disruptive and transformative developments to 2025 are those that will see established or establishing digital technologies deliver some of the 'consumer' trends and demands highlighted in this report. By 'consumer' trends we mean the trends for students to demand personalised, purpose-specific, time-efficient and effective English language learning (the latter point including more of a focus on effective conversation, perhaps at the expense of grammar in some cases).

These trends will see the continued decline of the 'night school' delivery model for adult language learning. They may also have some impact on the continued evolution of school tuition, but only to the extent to which state education provision has sufficient investment to embrace the latest developments. These traditional models of learning will be gradually replaced by a proliferation of teaching models embracing and integrating digital technology to differing degrees.

However, from the research undertaken in this report, we think it is just as important to highlight the less often discussed 'consumer' demands driving this change, as it is to highlight the more commonly discussed technological drivers. The most successful technologically enhanced delivery models will be the ones that deliver consumer demands for personalised, effective, purpose-specific and time-efficient learning.

Formally and accurately quantifying the uptake of these new modes and models of teaching is impossible (we have no trend data to work with, and to a large extent it depends on the ability and willingness of the sector to respond to the consumer demand). Despite this, it seems highly likely that, if the sector can effectively respond to the consumer demands, increased uptake of courses could more than compensate for the demographic depletion of the market.

Global political change is less significant

The research for this report is taking place at a time of significant political change. Two specific political developments were thought to be of relevance to the future demand for English language teaching and learning: the debate about globalisation versus protectionism and Brexit.

Despite the suggestion that there may be increased protectionism in some parts of the developed world, emerging markets still have more to gain by increasing the volume of global trade. This should result in a situation where the volumes of global trade remain at least at current levels. Indeed, the most likely scenario is that the most those wanting greater protectionism can achieve is a slowing of the rate of growth of global trade, rather than a decrease. On this basis, we see no great threat from this trend to the demand for English language teaching and learning to 2025.

Similarly, Brexit is not seen as a significant threat, despite Jean-Claude Juncker stating 'Slowly but surely English is losing importance in Europe'.[80] Put simply, the main drivers of demand for English language learning transcend the UK, and to a large extent they also transcend Europe. That the UK (the original home of English) is leaving the EU has little bearing on the demographic, economic, cultural and technological factors that dominate this report. English is the established global language. The reasons why people choose to learn English have for a long time been decoupled from the status or actions of the UK. That English is the language of the USA, and the language that China and India (for example) are using to engage with the world, is much more important to the future demand for English language teaching and learning than Brexit.

In any case, the impact of Brexit is far from obvious. As we have seen, just as Brexit might reduce the demand for English in some markets, such as Poland or Romania which have provided migrants to the UK, it might also increase demand for English in those markets such as France (and Germany) which are seeking to attract international employers who may be moving operations out of the UK.

'It is the language that links us to the whole world.'

Vasia Chanioti, Human Resources Manager, Eurolife EBR Insurance, Greece

'There is no way that Spain will lose its enthusiasm for English; this is a skill that you simply need to have if you travel or do business. We need to work with all nationalities, and to do that we need English.'

Rafael Cubero Saiz, Human Resources Manager, Tecnatom, Spain

[80] Rankin, J (2017) Brexit: English is losing its importance in Europe, says Juncker. *The Guardian* 5 May 2017. Available online at: https://www.theguardian.com/politics/2017/may/05/brexit-english-is-losing-its-importance-in-europe-says-juncker

25

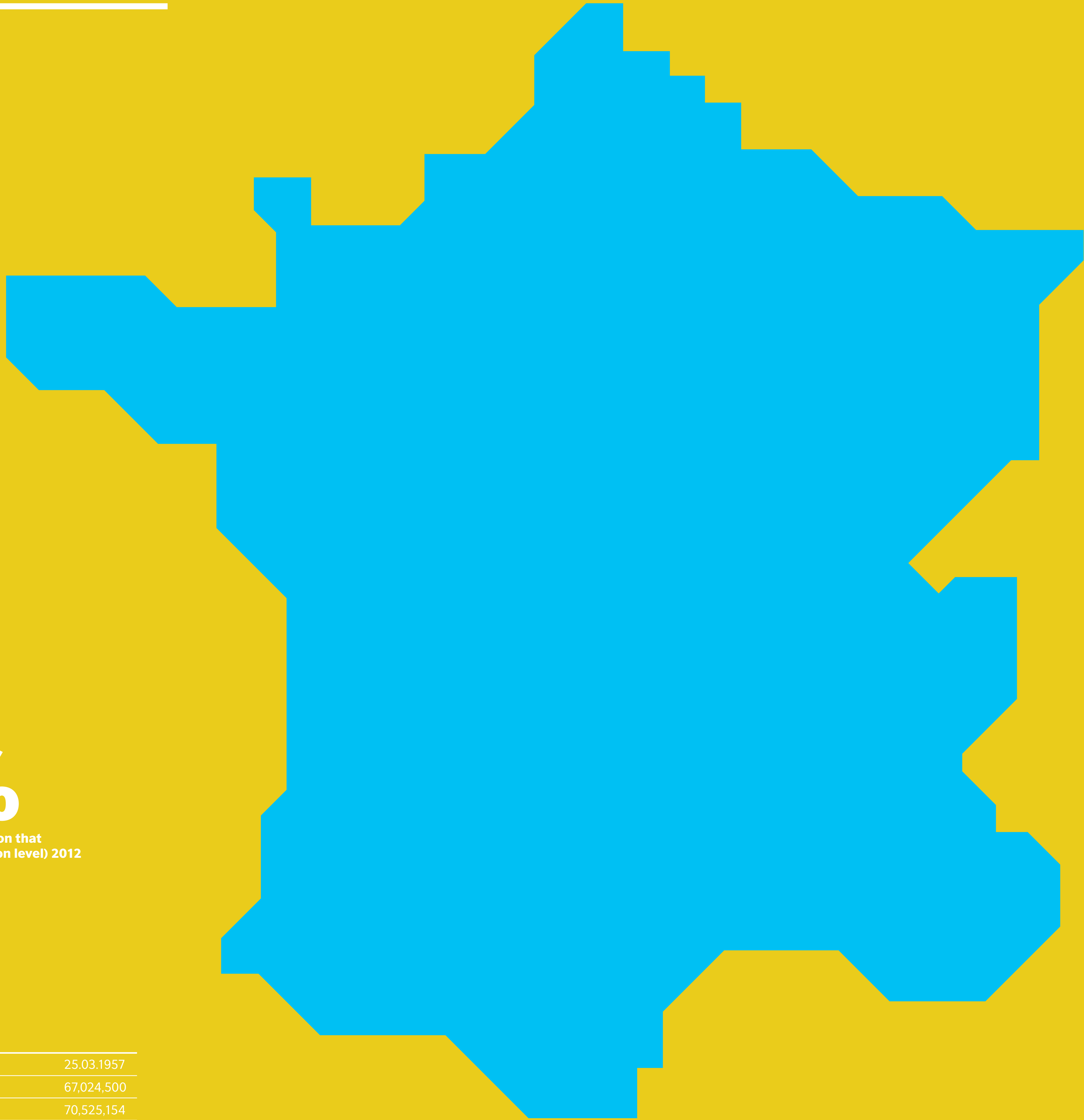
4

COUNTRY-SPECIFIC FINDINGS

The purpose of this section is to highlight points of interest and distinctive characteristics of the English learning and teaching market in each of the seven countries covered by the report.

France
Greece
Italy
Poland
Portugal
Romania
Spain

COUNTRY FRANCE



39%

Percentage of the population that speaks English (conversation level) 2012

766

Private English language schools

Date joined EU	25.03.1957
Size of population (2017)	67,024,500
Projected population (2030)	70,525,154
Population growth rate 2015–30	6.19%

FACTS AND FIGURES

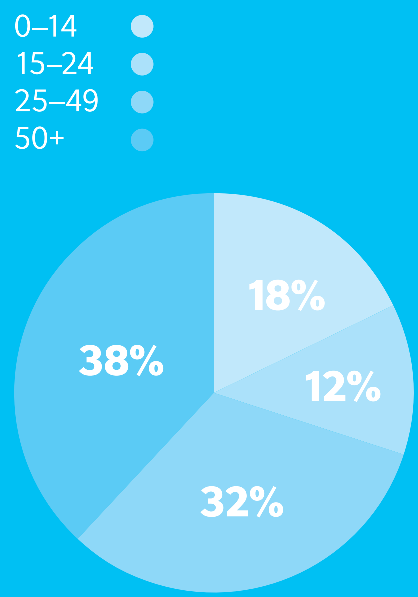
Economy

GDP per capita 2016	€31,700
Economic growth rate 2015	1.20%
Projected economic growth rate 2018	1.70%
Unemployment rate 2017	9.4%
Youth unemployment rate 2017	23.0%
Household dispensable income growth rate 2015	0.45%

Education

Mandatory school start age	6 years
Mandatory end-of-school age	16 years
Number of students in tertiary education 2015	2,424,200
Mean PISA score for reading in 2015	499
Number of students in Erasmus Programme 2012	33,269
Percentage of adults in education and learning 2016	18.8%

Breakdown of population by age (2015)



Foreign languages

English the mandatory second language in schools	Yes
Age at which students start learning first foreign language	7 years
Age at which mandatory learning foreign language ends 2016	18 years
Percentage of primary school pupils learning English	93%
Percentage of secondary school pupils learning English 2015	100%
Percentage with proficient knowledge of best known foreign language 2016	19%
Cambridge English Key (KET) pass rate 2016	98%
Percentage of lower secondary pupils learning two or more languages 2017	57%

Technology

Percentage of population with access to computers from home 2017	84%
Percentage of population with access to internet 2016	86%
Mobile phone penetration for internet use as percentage of internet users 2016	72%

See appendix for sources.

FRANCE

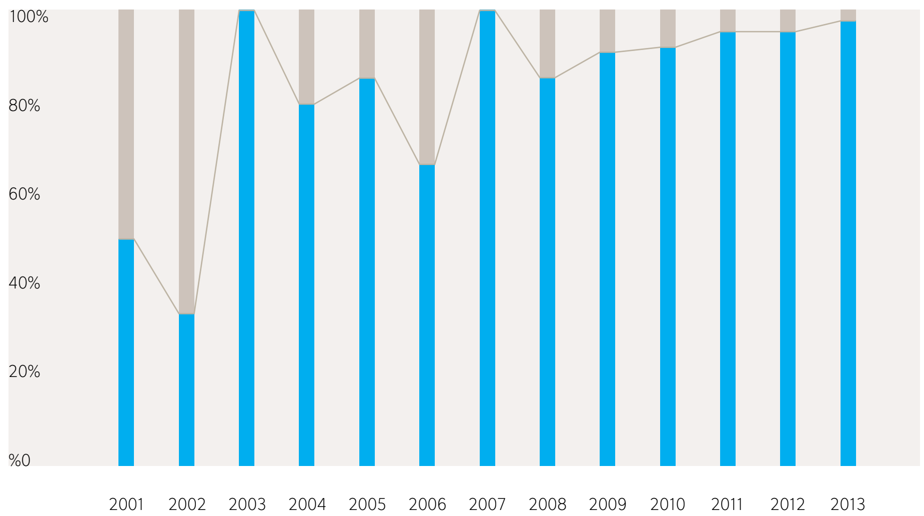
From competition to acceptance

France is unique among the seven countries included in this report in that, within living memory, its own language competed with English for dominance and influence around the world. This is reflected in our findings for both Spain and Portugal, where English has replaced French as the most commonly taught second language in the last 30 years or so.

As a result, for those over the age of 20, French governments did not always implement policies designed to increase their nation's understanding and use of English. Often policy was defensive, promoting the use of French and limiting the use of English (for example, the famous regulations limiting the amount of English language music played per hour on French radio stations).

However, it is fair to say that this attitude of competition with English has transformed into something closer to acceptance since the turn of the millennium. In recent years, the French government has introduced a range of policies that seek to increase English language proficiency for both children and adults.

Currently, however, most schools (around 92 per cent, according to Gail Ellis at the British Council in France) teach English as the first foreign language during compulsory education. Regionally, however, there are a few exceptions – for example, in Alsace and Lorraine, German will usually be the first foreign language taught in compulsory education due to the region having spent long periods under German influence.



KEY
Equivalent
Smartphone

'… the young generation here speaks English now – look at the example set by the President of the Republic who speaks English (with a bit of an accent). He is the first ever president who speaks it and as such he sets an example to young people here.'

Mary-Anne Spekhorst,
Training Manager, Penelope Agency,
Paris, France

Figure 10: Relative frequency of use of the English term smartphone and its official equivalents (telephone intelligent et ordiphone)

Source: Kim, M (2015) L'anglicisme et l'intervention linguistique gouvernementale: étude de l'implantation terminologique en francophonie. *ELIS - linguistic exchange in Sorbonne ELIS – échanges linguistiques en Sorbonne* 3/3: 79–102. Available online at: http://lettres.sorbonne-universite.fr/IMG/pdf/Kim2015_elis.pdf

'20 years ago, very few people spoke English in shops, restaurants, etc. and you'd be frowned at if you attempted to speak in accented French or English. The attitude now has completely changed and the French are no longer afraid to take the risk of speaking English.'

Gail Ellis, Adviser,
Young Learners and Quality,
British Council, France

There has been an increasing acceptance of anglicisation in France, although public dialogue around the extent of the phenomenon remains. For example, a 2015 study looking at two specific English loanwords, 'hashtag' and 'smartphone' (which have both caused national debates), found that, while in a Francophone region such as Quebec, language policy influenced the use of loanwords,

in France, on the other hand, French equivalents of smartphone (such as *téléphone intelligent*, or *ordiphone*) were initially preferred but their use has decreased over time.

While, at government level, policies have targeted increased levels of language teaching and learning, teachers often find themselves having little input with regards to the methodology used. This means that, in a significant proportion of schools, languages are often taught in theory-heavy, grammar-focused classes, at the expense of fluency activation.

CLIL teaching is not yet established in France, although international sections do exist in schools (these are schools where over one-quarter of pupils are foreign and certain subjects are taught in a foreign language), and Franco-German schools are not uncommon.[81]

With regards to digitalisation, the Digital School Plan remains a priority for the Ministry of Education, aiming to provide as many as 50 per cent of all national schools with equipment and digital education resources – this objective was set to be reached in September 2017.[82] Some efforts have been made to develop platforms that aid digital teaching methods and to train teachers in using them, as well as evaluating their skills and needs.[83] However, tools such as interactive whiteboards are not yet widespread.

Image: Teacher using digital tablet

[81] France, National description, in Eurydice (2006) *Content and Language Integrated Learning (CLIL) at School in Europe.*

[82] www.cedefop.europa.eu/en/news-and-press/news/france-digital-plan-education-500-schools-and-colleges-be-connected-internet

[83] European Union (2017a) *Education and Training Monitor 2017 – France.* Available online at: https://ec.europa.eu/education/sites/education/files/monitor2017-fr_en.pdf

State education provision improved, but parental jury still out

In common with the other countries covered in this report, education policy has seen an increased emphasis on English in the French state school sector. The common three strands of policy are: to start English language teaching and learning earlier, to increase the number of hours of teaching overall, and to increase the quality of the teaching.

However, in France it is still too early for significant changes to be filtering through – or at least filtering through into parental consciousness. As a result, there is a thriving private sector in France for children's language tuition, driven by parental desire for their children to speak English to a high standard. There is a growing demand for private schooling and out-of-hours tuition, as English is seen not only as socially prestigious, but also as a means of engaging in international higher education study and better employment prospects. For example, as one of our experts observed, even judges who may never leave France will be expected to understand what is happening overseas, to understand trends and to read the international press.

'The... private sector has grown considerably in and around Paris and in larger cities in France as well – in response to an increasing parental demand for English language learning that state schools just can't meet. The French expatriate community has expanded due to professional mobility and parents are determined to maintain the language skills their children acquired when living abroad.'

Daniela Bruneau, English Language Schools Association (ELSA), France

'English remains the language of business and you are not going to be able to change that situation quickly. Look at the extent of English courses in France now – even in nurseries, early learning, classes outside school. There is simply a lot of pressure on the young to learn English.'

Mary-Anne Spekhorst, Training Manager, Penelope Agency, Paris, France

'French businesses (even small ones) and regions are recognising that they have to be able to work in English these days... it's the younger generation who are driving this... I think sometimes French people are scared to try to speak English. But France is making progress.'

Andrea Fischer, Training Manager, AKKA Technologies, France

New government training policy encourages adult language learning

Historically, employee rights have been stronger in France than in many other parts of Europe. Since the 1970s, employers have had to finance the vocational training system. Furthermore, employers are forced to be more active through several schemes, such as the personal training account, the obligation to negotiate so-called anticipatory management of employment and competencies, or the commitment to organise a career interview for each employee.

From 1 January 2015, all private sector employees have a personal training account. An employee who changes jobs or alternates between work and unemployment will retain his or her right to training. This arrangement has replaced the Individual 'Right to Training' (Droit individuel à la formation – DIF) which was created in 2003 and was rarely used.

Every employee receives 24 hours per year worked (for a full-time post) until they reach a threshold of 120 hours; after they have reached the 120 hours threshold, they receive 12 hours a year until they reach the threshold of 150 hours. If the worker is employed on a part-time basis, the duration of the rights acquired is calculated proportionally to the working time. The account is accessible via an online service.

To be eligible for the personal training account, courses must be training programmes awarding a professional qualification which meet the anticipated needs of the economy in the short or medium term, and which benefit the employee by safeguarding his or her career path. The way in which the personal training account is used will be determined by the employee. The account cannot be debited without the consent of the account holder and is transferable between different jobs. The personal training account can be used to acquire foreign language skills, including the BULATS English test.

The employers' perspective

While historically, from an education perspective, France may have followed a different trajectory from the other EU states in our study, the necessity of English as an international language of commerce, business, science and academia has not been eschewed in France. Requiring prospective employees to have a fluent knowledge of English is the norm for employers, especially those in large urban centres and those that tend to be bigger than a family-owned enterprise.

A 2016 survey, conducted by private language course provider ABA English with 1,200 respondents, concluded that almost a quarter of those surveyed believed that they had missed out on a job opportunity due to their level of English.[84] The study also suggested that just under half (48 per cent) of French language learners of English studied the languageto further their career rather than to be able to converse with foreigners or use English when abroad. Furthermore, a surprisingly high 68 per cent of respondents believed that learning the English language should be subsidised by state institutions.

As with other countries in the study, certain industries and sectors will inevitably use English as a working language more often than others. The financial sector is a good example of this, with top schools in France having provided the City of London with top graduates in the field for many years.

[84] ABA English (2015) Bilan de l'année 2015: les Français et l'apprentissage de l'anglais. Available online at: www.abaenglish.com/fr/presse/revues-de-presse/bilan-de-lannee-2015-les-francais-et-lapprentissage-de-langlais/

Benjamin Levy, co-founder of Paris-based language learning platform Gymglish, says the banking sector typically makes up a significant proportion of the business.

Employers may also hire a language course provider to deliver tailored, in-house classes to staff whose levels need to be maintained or improved. As part of the study, the team spoke to the Head of Staff Training and Development at Penelope Agency, an enterprise that provides concierge and reception as well as business support services, and whose workforce is often required to communicate using a high standard of English:

'For certain ranks of people, it will be valuable to spend some time in England or Ireland. However, our staff (hostesses) have specialist requirements. Spending nine months abroad is not necessarily going to give you the structured language you need; living in England does not necessarily teach you how to be correct in English – it's not going to meet our needs in itself. Our own English courses are related to the needs of our company and its trade (i.e. dealing with customers in the flesh).'

Mary-Anne Spekhorst, Training Manager, Penelope Agency, Paris, France

Where in-house training is not provided, employers may choose to encourage personnel to undergo digitally delivered language training, which is seen as a more cost-efficient and flexible alternative, as well as allowing HR staff to access important analytics data that can shed light on the different ways in which employees learn languages. However, many young professionals also choose to take digital courses individually in their spare time, to strengthen their CV and broaden their job prospects.

'Our users are usually people with busy schedules. They might not always be able to afford or commit to a teacher, either for economic reasons or due to scheduling commitments – very often it is both. They know that there are online resources available for free, but they also know that a language is not learned overnight. It is one thing to have a lot of resources at your disposal and another thing to learn and retain language. Many are professionals looking for career advancement and are looking to speak better English or have ended up regretting not learning better English before.'

Benjamin Levy, CEO, Gymglish, Paris, France

'It will usually be banks in France, Switzerland or Germany, and usually the window is B1 to C1. However, HR directors will not always refer to CEFR terminology to tell us what they would like to achieve – they usually have more subjective expectations. Often, employees want to be able to express themselves in a confident way via email, or on the phone.'

Benjamin Levy, CEO, Gymglish, Paris, France

Impact of Brexit – less interest in Britain, but not less interest in the English language

Some of our French experts thought that Brexit might result in less interest in the UK as opportunities to travel, work and study there may diminish.

However, this was in no way seen to correlate with reduced interest in English language teaching and learning. English as a requirement for international study and employment would not diminish. Further, one respondent suggested that Brexit could boost the demand for English language teaching and learning in France (and especially Paris) as the French government attempts to attract international and English-speaking businesses leaving the UK, and especially the City of London.[85]

[85] Butcher, S (2017) I would now leave the City of London for Paris. *efinancialcareers* 8 May 2017. Available online at: https://news.efinancialcareers.com/uk-en/282741/french-bankers-london-macron-BREXIT

Image: University Theatre, Paris - France

COUNTRY GREECE

51%

Percentage of the population that speaks English (conversation level) 2012

5,835

Private English language schools

Date joined EU	01.01.1981
Size of population (2017)	10,757,300
Projected population (2030)	9,944,658
Population growth rate 2015–30	-8.41%

FACTS AND FIGURES

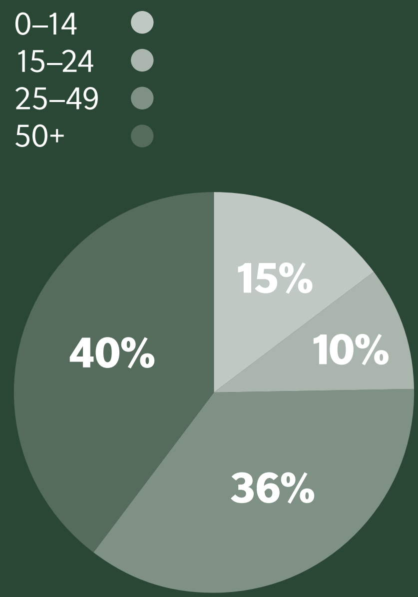
Economy

GDP per capita 2016	€17,100
Economic growth rate 2015	-0.20%
Projected economic growth rate 2018	3.10%
Unemployment rate 2017	20.6%
Youth unemployment rate 2017	43.3%
Household dispensable income growth rate 2015	-1.97%

Education

Mandatory school start age	6 years
Mandatory end-of-school age	15 years
Number of students in tertiary education 2015	667,400
Mean PISA score for reading in 2015	467
Number of students in Erasmus Programme 2012	3,591
Percentage of adults in education and learning 2016	4%

Breakdown of population by age (2015)



Foreign languages

English the mandatory second language in schools	Yes
Age at which students start learning first foreign language	6 years
Age at which mandatory learning foreign language ends 2016	18 years
Percentage of primary school pupils learning English	79%
Percentage of secondary school pupils learning English 2015	92%
Percentage with proficient knowledge of best known foreign language 2016	31%
Cambridge English Key (KET) pass rate 2016	100%
Percentage of lower secondary pupils learning two or more languages 2017	97%

Technology

Percentage of population with access to computers from home 2017	71%
Percentage of population with access to internet 2016	68%
Mobile phone penetration for internet use as percentage of internet users 2016	65%

See appendix for sources.

GREECE

Economic recession and population challenges

The debt crisis in Greece gives a context of high unemployment (20 per cent) and particularly high youth unemployment (43 per cent). Greece has the highest rate in Europe of 15- to 29-year-olds with a degree who are not in employment, education or training (40 per cent).[86] This has led to a 'brain drain', with well-educated Greeks moving abroad for better opportunities. Between 2008 and 2016, 427,000 people aged between 15 and 64 left the country. In 2013, 100,000 left, tripling the yearly average.[87] This also boosts demand for English.

The birth rate has fallen sharply during the crisis, from 118,000 births in 2008 to 92,000 in 2014 (a 22 per cent drop).[88] This has affected the education sector and will affect future demand. The primary school population is forecast to drop by a quarter over the next few years.[89]

Greece is facing a generational problem in the teaching profession – nearly half of primary school teachers (49 per cent) are aged over 50 and less than one per cent are under 30.[90] Teachers' salaries are low compared to other countries[91] and they have fallen to 78 per cent of their 2008 level. To address the government spending deficit, pay scales have been reclassified and pay was frozen until 31 December 2017 to reduce costs.[92] Because of low salaries, many highly trained and fluent English teachers chose not to enter the profession.

The migrant crisis has brought large numbers of asylum seekers and refugees. In 2016 Greece received 173,450 sea arrivals mainly from Syria, Afghanistan and Iraq.[93] Greek is not spoken or taught in these countries, so English often becomes the lingua franca when helping and processing these people.

The proportion of Greeks who can speak English is high – around half claim they can hold a conversation in English (higher than the other countries in this study).[94] Many English language television programmes are available, and they are rarely dubbed (unless aimed at very young children). Greece is a small but very outward-facing country with a history of emigration to English-speaking countries (particularly the USA and Australia).

[86] European Commission (2016) *Education and Training Monitor 2016: Greece.*

[87] Bank of Greece (2016) *Fleeing of human capital: contemporary migration tendencies of the Greeks in the years of crisis.*

[88–90] *Ibid.*

[91] https://data.oecd.org/eduresource/teachers-salaries.htm

[92] *Op cit.* European Commission (2016).

[93] www.asylumineurope.org

[94] *Op cit.* Directorate-General for Communication (2012).

'Digital technology has changed the way in which English is taught in Greece today. Teachers use software and tablets to teach, and there is some use of whiteboards, although these are not as widespread due to cost. We have teachers who are not technophobic – they find new ways of conveying knowledge through technology in their classrooms. Textbooks are also changing – they used to follow a structure that was conducive to exam taking, but they now incorporate more interactive elements and often come with accompanying software.'

Dr Thomaï Alexiou, Department of Theoretical and Applied Linguistics, School of English, Aristotle University of Thessaloniki, Greece

English in mainstream education

Greece stands out as the country with the worst perception of the usefulness of language lessons at school.[95] Only a minority (13 per cent) of Greek respondents in a 2012 survey cited compulsory education English teaching as the most effective method they had used, while just over half of respondents (51 per cent) specified group language lessons with a teacher outside school as the most effective way they had learned a language.[96] This very much reflects what is happening in the balance between mainstream and private provision.

Compulsory education now lasts from five until 15 years of age.[97] French was the most widely spoken and taught foreign language in Greece until English was introduced from the third year of primary school in 1989. For more experimental purposes, English was introduced to selected schools from the first year of primary in 2010.[98]

The Greek education system is undergoing comprehensive reforms, and although there has been an increase in provision in primary school, the number of hours of English instruction in upper secondary school has decreased from 98 to 90 hours a year,[99] but again this reflects the relationship between the state and private language teaching sector. This makes Greece one of the EU countries with the fewest hours of English in upper secondary school.[100] Older school students currently study English for an average of two hours a week.[101]

Following the experimentation in 2010, English is now taught from the first year of primary school[102] for one hour a week and follows the Ministry of Education-specified syllabus based on the 'Learning English in Early Childhood Programme' (PEAP).[103] From Year 3 to 6, children receive three hours per week.[104] This has decreased from four hours a week.

Standards for English teachers are high in the state sector. Teachers have to pass an English language teaching degree from the University of Athens or the University of Thessaloniki, where they aim to produce near-fluent (C2 level) teachers.

Despite highly qualified teachers, parents are often concerned about the level of English that children can reach through their mandatory schooling. A very high proportion of pupils attend regular after-school language classes (estimated at 95 per cent). This can lead to problems of classes of mixed language ability[105] in mainstream school as pupils will have received different amounts of additional instruction.

With language learning starting earlier and the large numbers of children attending private language schools, relatively high levels of proficiency are achieved early on. It is common for pupils as young as 12 years old to sit a B2 level exam in English.[106] Language learning at school often stops at 15–16 years old (many teenagers take the Cambridge English Proficiency test at this age), to allow upper secondary school pupils to focus on other end-of-school exams and exams for university admission. This in some part explains the low levels of compulsory hours in upper secondary.

While there are still infrastructure problems in places, the Greek state education system has embraced the use of technology as a language teaching tool.

[95, 96] *Ibid.*

[97] *Op cit.* European Commission/EACEA/Eurydice (2017).

[98] *Op cit.* Papaefthymiou-Lytra, S (2012).

[99] *Op cit.* European Commission/EACEA/Eurydice (2017).

[100–102] *Ibid.*

[103] https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/index.php/Greece:Overview

[104] *Op cit.* https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/images/0/0d/KDL_Eurydice_Brief_finals.pdf

[105] European Commission (2014) *Languages in Education and Training: Final Country Comparative Analysis*. Available online at: http://ec.europa.eu/dgs/education_culture/repository/languages/library/studies/lang-eat_en.pdf

[106] Alexiou, T and Mattheoudakis, M (2013) Introducing a foreign language at primary level: Benefits or lost opportunities? The case of Greece. *Research Papers in Language Teaching and Learning* 4/1: 99–119.

‘There is a perception that, in Europe, English is the working language for almost everything, that it is not possible to function in a global world without English. Anything that is more international or requires international participation, English is still used.’

Professor Bessie Dendrinos, Professor of Sociology of Language and Foreign Language Education at the Department of Language and Linguistics, Faculty of English Language and Literature, School of Philosophy, National and Kapodistrian University of Athens, Greece

Image: Statue of Apollo outside the Academy of Arts in Athen's, Greece

High demand for language assessment certificates

Certificates and accreditation are culturally very important in Greece and even more so in the highly competitive jobs market. Having certificated English is a must for young Greeks and particularly professionals and students who want to go abroad to study. But this leads to many private language schools 'teaching to the exam', rather than focusing on teaching good communication skills.

Another trend particular to Greece is the rising popularity of the more North American-oriented Michigan exams. Demand for certificates has led to a flourishing after-school language learning industry in language centres or foreign language school *'frontistiria'*.[107]

'The Michigan exam is sometimes seen as a friendlier way of examining, in the American style, with multiple choice. They have also been recognised by the Greek state so there is no difference between Michigan and Cambridge. Companies recognise it as well, and so do some UK institutions.

Eva Kaliskami, Head of English, IM Panagiotopoulos, Greece

Foreign language *frontistiria* schools are mostly local and relatively cheap, as well as being ubiquitous (with smaller Greek islands being no exception), but quality varies.

During the economic crisis, the private education sector was at first cushioned from impact. Culturally, education is important and a priority expenditure for families, but the depth and duration of the crisis has lowered *frontistiria* fees.

'In the average public school, classes are big. We've got 25, even 30 students, depending on the part of the country. The average frontistiria, because of its size, has an almost perfect teacher–student ratio, five or six students per class. Most frontistiria are exam-oriented and you cannot blame them for that – this is the way to prove to parents and to students, and to themselves, that they are doing a good job.'

Dr Dimitris Tolias, Center for Applied Linguistics and Language Studies, Hellenic American Union, Greece

'The teaching quality in frontistiria depends on several factors – the economic crisis has made it difficult to retain teachers that have all the right qualifications. Sometimes the teachers will be hired if they have got a C2 level certificate.'

Eva Kaliskami, Head of English, IM Panagiotopoulos, Greece

'I believe English language instruction in state school could be much better than private institutions. Some private institutions in Greece are very exam-oriented because their customers (parents) pay money so their kids get the certificates.'

Dr Thomaï Alexiou, Department of Theoretical and Applied Linguistics, School of English, Aristotle University of Thessaloniki, Greece

[107] *Op cit.* Papaefthymiou-Lytra, S (2012).

'You can have a certificate, but you have to use the language – read it, hear it, speak it. If you stop doing that and you haven't got access to ways in which you could do that, you may find yourself knowing how to read and write but not use the language in everyday situations.'

Vasia Chanioti, Human Resources Manager, EuroLife EBR Insurance, Greece

Other private language provision

Some better-off parents send their children to private day schools with a strong foreign language component (British or American schools in larger cities), or bypass *frontistiria* and private language schools altogether and encourage children to do one-to-one lessons. Some parents feel that private one-to-one tutoring is more cost-effective, as it gives them the ability to negotiate the duration, timing and the cost. There are around 8,200 private tutors.[108]

The reason for bypassing the *Frontistiria* system and investing in private tuition is because the former acts as an exam crammer, rather than teaching English for lifelong use. Private schools aspire to be learning- rather than testing-oriented and to enable students to become more autonomous as learners.

English as a vocational necessity

English is a must in a country experiencing high rates of unemployment. The 2012 Eurobarometer survey showed that Greece was the EU state in which respondents were highly likely to cite working in another country as a key benefit of learning a new language (73 per cent).[109] Greeks are outward-looking in terms of culture, study and work.

In some sectors, accreditation is mandatory. For example, the Greek Supreme Council for Civil Personnel Selection (ASEP) requires civil servants to demonstrate proficiency in a foreign language.[110] In general, smaller businesses rely on language certificates when they look for employees, while larger corporations, such as banks, invite candidates for an interview in English whenever they are expected to be able to communicate fluently at work.[111]

A high level of fluency and confidence in English is viewed as a 'passport' in Greek professional life.

When Greek insurance company Eurolife was acquired by Fairfax (a Canadian company) in 2016,[112] English was the second working language to Greek. Before the acquisition (when everyday operations were in Greek), English proficiency was a requirement, but the company found that more and better English was needed. Partnering with a private language provider, all employees received two hours of English on a weekly basis, to bring older employees to a B2 level, and/or strengthen the business English of employees with English above a B2 level.

[108] www.eoppep.gr

[109] *Op cit.* Directorate-General for Communication (2012).

[110] *Op cit.*Papaefthymiou-Lytra, S (2012).

[111] *Ibid.*

[112] Press Release Details: Fairfax to Acquire 80% Interest in Eurolife. Available online at: www.fairfax.ca/news/press-releases/press-release-details/2015/Fairfax-to-Acquire-80-Interest-in-Eurolife/default.aspx

COUNTRY ITALY

34%

Percentage of the population that speaks English (conversation level) 2012

1,891

Private English language schools

Date joined EU	25.03.1957
Size of population (2017)	60,589,400
Projected population (2030)	60,350,475
Population growth rate 2015–30	-0.73%

FACTS AND FIGURES

Economy

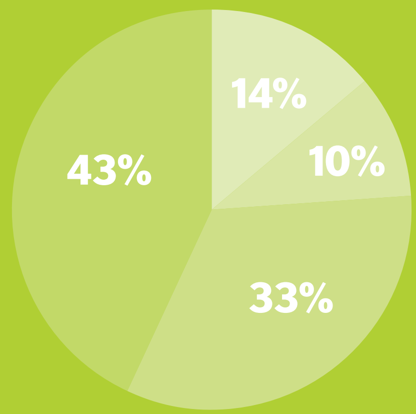
GDP per capita 2016	€25,900
Economic growth rate 2015	1.90%
Projected economic growth rate 2018	1.80%
Unemployment rate 2017	11.1%
Youth unemployment rate 2017	35.1%
Household dispensable income growth rate 2015	1.13%

Education

Mandatory school start age	6 years
Mandatory end-of-school age	16 years
Number of students in tertiary education 2015	1,826,500
Mean PISA score for reading in 2015	485
Number of students in Erasmus Programme 2012	23,377
Percentage of adults in education and learning 2016	8.30%

Breakdown of population by age (2015)

0–14
15–24
25–49
50+



Foreign languages

English the mandatory second language in schools	No
Age at which students start learning first foreign language	6 years
Age at which mandatory learning foreign language ends 2016	19 years
Percentage of primary school pupils learning English	98%
Percentage of secondary school pupils learning English 2015	98%
Percentage with proficient knowledge of best known foreign language 2016	11%
Cambridge English Key (KET) pass rate 2016	98%
Percentage of lower secondary pupils learning two or more languages 2017	96%

Technology

Percentage of population with access to computers from home 2017	73%
Percentage of population with access to internet 2016	78%
Mobile phone penetration for internet use as percentage of internet users 2016	78%

See appendix for sources.

ITALY

Lower levels of demand and motivation

Italians have sometimes been characterised as being poor at foreign languages, perhaps in part because of the large number of dialects, making it more important to learn the national language than foreign languages.[113] Generally, films and television are dubbed, using a full cast, so there is less informal English acquisition than in other countries.

In a survey of Italian English teachers and professors in 2011, 79.3 per cent believed that Italians were motivated to learn English, but some also believed that Italians could be successful without English, and that there was a healthy Italian culture that Italians appreciate and enjoy.[114]

Nonetheless, by 2006 government reforms made it mandatory to learn two foreign languages in school and, since 2013, Italy has moved up four places in the ranking of proficiency, though it is still ranked as moderate.[115]

School reforms and teacher training

Italy is now among those countries (after Spain) where students are taught English earliest in mainstream schools. Various government reforms have seen the age drop from 11 years old in 1984 to six by 2007.[116] English is mandatory as soon as students start primary school, and many are exposed to English before this.[117] The Italian Foreign Ministry of Education is also looking to introduce English language lessons at the preschool level:

'We are developing a new plan to train teachers in English and we will have foreign languages as part of the preschool curriculum, as both the European Commission and research findings are recommending. This could come into effect within a year.'

Gisella Langé, Inspector for Foreign Languages, Ministry of Education, Italy

Italy's education system is currently undergoing comprehensive reforms. The education reform plan (Piano Nazionale di Formazione) is predicted to have a large positive impact on GDP in the long term.[118]

In primary schools, English language lessons are taught by general teachers. They do not always receive initial ('pre-service') training to teach foreign languages, but participate in 'in-service' professional development training, according to Associate Professor Lucilla Lopriore. However, initial teacher training for specialist foreign language teachers lasts six years, making them one of the longest programmes among EU member states.[119]

[113] Pulcini, V (1997) Attitudes to the spread of English in Italy. *World Englishes* 16/1.

[114] Faez, F (2011) English Education in Italy: Perceptions of Teachers and Professors of English. *Comparative and International Education* 40/3. Available online at: https://ir.lib.uwo.ca/cie-eci/vol40/iss3/4/

[115] World Economic Forum (2016) Which countries are best at English as a second language? *World Economic Forum* 15 November 2016. Available online at: https://www.weforum.org/agenda/2016/11/which-countries-are-best-at-english-as-a-second-language-4d24c8c8-6cf6-4067-a753-4c82b4bc865b/

[116] *Op cit.* Faez (2011).

[117] *Ibid.*

[118] European Union (2015) *Education and Training Monitor 2015 – Italy*. Available online at: http://ec.europa.eu/dgs/education_culture/repository/education/tools/docs/2015/monitor2015-italy_en.pdf

[119] *Op cit.* Faez (2011).

The expected level of fluency in English at the end of upper secondary school is B2, but this is not currently verified by regulatory bodies or the Ministry of Education. Plans to introduce standardised tests for English at the end of the primary and lower secondary cycle of education have already been devised and are due to come into effect later this year. In 2019, the same testing will also be introduced at the end of upper secondary school. This is expected to be a significant challenge because of a lack of teachers who include in their teaching a good level of listening, speaking and other interactive and 'real-life' type exercises centred on conversational English. However, it is also possible that the introduction of standardised testing may boost fluency levels across the country as schools prepare to meet certain performance indicators.

A recent initiative sees teachers in state-funded schools receive an annual budget of €500 ('bonus docenti') to continue their professional development. According to Roma Tre University's Lucilla Lopriore, it is difficult to verify the outcome of the chosen training. Teachers are not always asked whether the money was used to attend a course or conference, or purchase an electronic device such as an iPad.

Image: Elementary students with digital tablet

Taking the lead in CLIL (Content and Language Integrated Learning)

Italy is a strong supporter of CLIL programmes. CLIL-style classes have been taking place in isolated pockets of Italian state schools since the late 1990s, though the first programmes were quite experimental. In 2012, it became compulsory for some form of CLIL teaching to take place during the last three years of upper secondary school. This initiative has been extended to primary level, partly related to the enthusiasm of primary school teachers in this field. Since most primary school teachers are generalists, the idea that they can train to teach a subject in English is appealing from a professional development perspective.

Most staff who become CLIL teachers start out as specialist subject teachers and are eligible to become CLIL teachers if they also speak a foreign language at C1 level. Currently there is a shortage of subject teachers who fulfil both criteria.

Private and language schools: changes in the target demographic

Until the economic recession in 2008, it was a widely held belief that one can get by well enough without good English. The recession significantly affected the corporate sector, and increased parental demand for investment in the future economic opportunities of younger generations.

Even academia was affected – in the past, academics and university professors could choose to be accompanied by an interpreter when travelling to international conferences. This is no longer subsidised, making English proficiency a requirement for academics.level. Currently there is a shortage of subject teachers who fulfil both criteria.

Demand often comes from parents when they realise the number of English hours their children have been getting at school is too low, or the type of teaching received does not suit their needs. Alternatively, if this does not happen, reality often hits when a young professional is looking for their first job and discovers their English level is not high enough.

Private providers often provide content, tutoring and lessons to the business sector, and even to state schools whose teachers want more training. Giuseppe Romagnoli at International House in Ancona describes training state school teachers through webinars, seminars and other formats of content delivery. Sometimes the bonus docenti can be used to allow teachers to these. This type of training is aimed at teachers who want to develop their teaching practice and goes beyond English language teaching methodology, and includes skills such as classroom management.

The value proposition in the private sector in Italy is experts and tutors who are qualified in various 'types' of English, but also tutors who will stay with the company or language school for a long time – in countries where salaries in state schools are low, knowledgeable staff may be difficult to retain.

'Among adults, the main aim is to get a certificate around the B2 level – that is currently the most popular level that fills the gap within the adult language learning market. Some adults choose to attend more niche courses, such as classes for business or medical English. Although the number of adults attending these courses here in Catania is not huge, I know things are different in the north of Italy.'

Palmina La Rosa, Director,
International House, Catania, Italy

'People are more cost-conscious when it comes to learning English, and Italians, culturally, have placed an emphasis on quality first, but now they are becoming more conscious of how much they are paying per hour. A lot of schools market themselves on that – "the lowest price per hour".'

Paul Sellers, British Council, Italy

Giacomo Moiso of Fluentify cites quality control as one of the factors that keepsthe website's quality of teaching high – directors of learning will thus occasionally have a one-to-one conversation with English tutors to assess their competence. In addition, the platform's referral system (where existing tutors recommend new people) means new staff can be recruited in as little as two weeks – a benefit that may not always be available to 'conventional' face-to-face instructional schools. An additional benefit here is the opportunity to do a deep 'needs analysis' with the company in need of English language training, ensuring that key industry-specific areas are covered and providing an additional level of customised learning.

English before and at university

Parents often send young children to private language schools to ensure high language proficiency. This is so that their children can study at a tertiary level in another language, improving their employability and professional and vocational mobility in the EU.

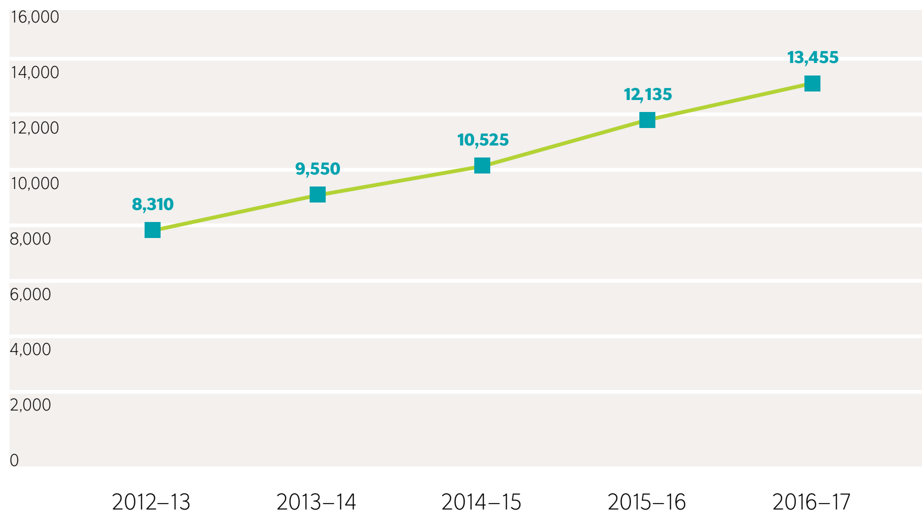
English-taught bachelor's programmes (ETBs) have become popular in Italy. They attract foreign students as well as addressing an increasing need to develop truly global institutions that can equip home students with the necessary level of future-facing skills, including proficiency in English. One of Italy's leading universities (the Politecnico di Milano) has recently switched to teaching and assessing students in English,[120] not only to make its student body more employable in international firms, but also because of the need to publish academic research papers in English.

Digital elements are often incorporated into teaching at university level. In some higher education institutions, university lecturers are required to use learning management systems such as Moodle to communicate with students and store important material.

Italy sends a significant number of students to study in the UK, and the number of Italian students opting for this has risen year-on-year (see Figure 12). In most cases, Italian students must have a good level of English to be admitted to UK institutions.

Figure 11: Number of students sent to the UK, 2012 to 2017 (thousands)

Source: Higher education student enrolments and qualifications obtained at higher education providers in the United Kingdom 2015–16 – HESA



[120] Coughlan, C (2012) Italian university switches to English. *BBC News* 16 May 2012. Available online at: www.bbc.co.uk/news/business-17958520f

Investing in future skills: the necessity of English and employability

Despite the gradual improvement of the labour market in Italy, long-term and youth unemployment remain high. The long-term unemployment rate was around seven per cent in 2016 and youth unemployment was around 40 per cent. Over 1.2 million young people were not in education, employment or training. Participation in adult learning remains low, and the higher education system is significantly underfunded.[121]

Because of Italy's youth unemployment rate, a good grasp of written and spoken English serves as a pathway to employability, and ensuring that there are 'work-ready' employees for the domestic labour market is a priority for the government, parents, and even private companies.

Multinational companies based in Italy often use Italian in the office, and then use English to speak to clients in Argentina, France and Germany because English is the lingua franca. Italian employees also need to be able to communicate well in English by email.

Another factor that has accelerated the demand for good levels of workplace English is the change Italian-based multinational companies have undergone during the last decade. DHI Global's Cristiana Pontiroli, for example, mentions the company's history of using German as its initial international working language (as the company is based in Germany), only to find there was a shortage of potential Italian employees with B2 levels of German. DHI Global has changed its working language to English. Continuous learning and improvement are encouraged with on-demand English language courses delivered in partnership with the British Council, and the pool of employees available to select from has also widened. A similar example is American domestic appliance manufacturer Whirlpool's acquisition of Italian company Indesit.[122] In this case, the Italian employees benefit from developing stronger English skills as they work with American colleagues, and transitional arrangements mean that the international working language and organisational culture at Indesit are likely to undergo further changes.

Giacomo Moiso, CEO and co-founder of Fluentify, says that the tutoring platform is sometimes used by the recruitment industry when companies are hiring multilingual staff, but cannot always rely on a human resources team who are fluent enough to assess candidates' level of English.

When tutoring platforms such as Fluentify deliver company-wide training programmes, the tutoring itself still takes place using a one-to-one model. In some cases, employees can bring real-life examples of PowerPoint presentations or emails to the virtual class to discuss with their tutors. This model of work-based learning blends industry-specific and business English terminology and etiquette with real-life situations, thereby heightening employee confidence.

[121] https://ec.europa.eu/info/sites/info/files/2017-european-semester-country-report-italy-en_0.pdf

[122] Indesit – Company History. Available online at: www.indesitcompany.com/inst/en/vision/storia/storia.jsp

Image: Teacher with laptop

COUNTRY POLAND

33%

Percentage of the population that speaks English (conversation level) 2012

1,900

Private English language schools

Date joined EU	01.05.2004
Size of population (2017)	37,973,000
Projected population (2030)	37,213,790
Population growth rate 2015–30	-2.08%

FACTS AND FIGURES

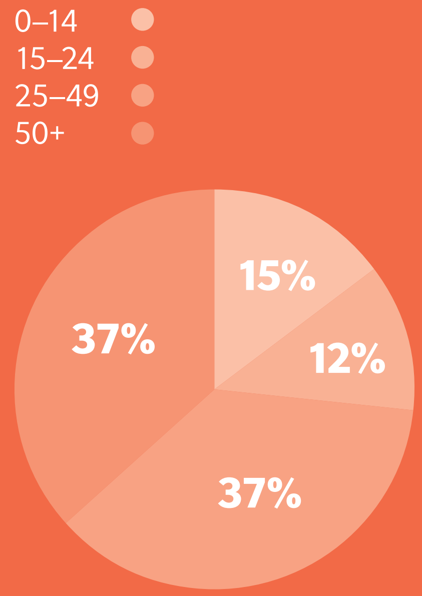
Economy

GDP per capita 2016	€11,200
Economic growth rate 2015	2.90%
Projected economic growth rate 2018	3.10%
Unemployment rate 2017	4.6%
Youth unemployment rate 2017	13.9%
Household dispensable income growth rate 2015	3.79%

Education

Mandatory school start age	7 years
Mandatory end-of-school age	16 years
Number of students in tertiary education 2015	1,665,300
Mean PISA score for reading in 2015	506
Number of students in Erasmus Programme 2012	15,315
Percentage of adults in education and learning 2016	3.70%

Breakdown of population by age (2015)



Foreign languages

English the mandatory second language in schools	No
Age at which students start learning first foreign language	7 years
Age at which mandatory learning foreign language ends 2016	18 years
Percentage of primary school pupils learning English	95%
Percentage of secondary school pupils learning English 2015	95%
Percentage with proficient knowledge of best known foreign language 2016	15%
Cambridge English Key (KET) pass rate 2016	75%
Percentage of lower secondary pupils learning two or more languages 2017	94%

Technology

Percentage of population with access to computers from home 2017	82%
Percentage of population with access to internet 2016	80%
Mobile phone penetration for internet use as percentage of internet users 2016	60%

See appendix for sources.

POLAND

Sharp increase in demand because of political changes

There has been a dramatic increase in the demand for English in Poland over the last 30 years after the fall of communism and Poland joining the EU in 2004. Until the late 1980s, Russian was the compulsory foreign language taught in schools, and although English was offered as one of a choice of languages in secondary schools, there was little exposure to English – satellite television was banned and there was very limited access to English materials and English speakers.

After the 1989 election, foreign language teaching underwent a transformation, and English replaced Russian as the first foreign language in schools. In the early 1990s, there were few universities with English philology departments (as they were known). Poland faced a shortage of English teachers and levels of English learning and proficiency were generally low. During the 1990s the British Council, using the Know-How Fund, led a number of English language teaching projects in Poland and across Eastern and Central Europe, working with many thousands of teacher trainers, assessment experts, school inspectors, text book writers and English for Special Purposes specialists. These established a professional cadre of English language teaching experts and English as the foreign language of choice. A significant number of teacher training colleges and university departments of English philology were established, and there is now a surplus of English teachers in some regions.[123] Interviewees said that demand for English increased significantly once Poland joined the EU in 2004.

Despite the increased interest in learning English since the end of communism, in 2011 only 12.7 per cent of Poles were proficient in their best known foreign language.[124] Unless they are professionals or have lived in an English-speaking country, very few older adults are proficient English speakers.

Cross-border mobility

Poles have embraced learning English wholeheartedly, particularly because of the number of Poles who work outside Poland. English is the lingua franca for Poles working across Europe and in Scandinavia. In 2016, there were 911,000 Polish-born residents living in the UK.[125] Culturally, Poles are outward-looking. In a survey in 2014, around 14 per cent of adult Poles had worked abroad since 2004 (approximately a quarter of those had worked abroad for over a year), 69 per cent had a family member or a close friend who lived abroad, and approximately 24 per cent said they would consider emigrating.[126] Another trend is that Polish migrants are increasingly likely to be young and well educated.[127]

[123] Zielonka, B (n.d.) Poland. *Windows on CLIL*. Available online at: http://archive.ecml.at/mtp2/clilmatrix/docs/windows/windows%20on%20clil%20poland.pdf

[124] http://ec.europa.eu/eurostat/statistics-explained/images/a/a8/Distribution_of_the_level_of_command_of_the_best-known_foreign_language%2C_2007_and_2011_%28%25_of_people_aged_25%E2%80%9364_years_who_knew_at_least_one_foreign_language%29_edu15.png

[125] https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/bulletins/ukpopulationbycountryofbirthandnationality/2016

[126] Kowalczuk, K (2013) CBOS BS/166/2013: *Poakcesyjne Migracje Zarobkowe*, 3–7. See http://www.cbos.pl/SPISKOM.POL/2013/K_166_13.PDF

[127] Article in Polish press by Karolina Nowakowska 19 October 2014 translated as 'Poland disappointed me. In emigration, it's not just about money' http://praca.gazetaprawna.pl/artykuly/829684,polska-mnie-rozczarowala-w-emigracji-nie-chodzi-juz-tylko-o-pieniadze.html

'Anyone under 20 has had English from when they were very young.'

Justyna Martin MA, Director of Studies, Empik School Warsaw Centre (Junior), Poland

Government initiatives

Around 95 per cent of children attend state schools. Government policy has reduced the age at which children learn their first foreign language from 11 to five years old and, in most schools, this is English, athough English is not compulsory, and Russian and German remain popular in the border regions.[128] By secondary school, most students study English (96.2 per cent)[129] and they need to pass the whole exam Matura (egzamin maturalny), including English, at the end of upper secondary school, in order to enter higher education. However, the pass mark is low, and students tend to achieve a B1 level (or B2 with additional private instruction).

Between 1999 and 2002, the percentage of children learning English in primary school grew from 24.9 per cent to 49.2 per cent.[130] Younger Poles speak better English and under-20s have the best levels of English.

Proficiency in English is improving all the time. Because of government incentives, specialist English language teachers (especially in secondary schools) are well trained and have good levels of English.

'They [teachers] are either a graduate in English from a teacher training college or have a degree in English philology… Some of these teachers are brilliant…'

Justyna Martin MA, Director of Studies, Empik School Warsaw Centre (Junior), Poland

Image: Warsaw University building

[128] *Ibid.*

[129] http://ec.europa.eu/eurostat/web/education-and-training/data/database

[130] Op cit. European Commission/EACEA/Eurydice (2017).

‘English is an essential skill for finding a job. The market isn’t saturated. Lots of people need English and want to learn. The problem is time.’

Michal Zajac, Co-owner,
Lublin Royal School of English,
Lublin, Poland

Image: Boy riding his kick scooter in a garden of the Warsaw University library

High demand in the private English language market

The private language teaching market flourished in the 1990s and continues to be healthy. The private language market is large, and consists of lots of small local providers as well as larger international franchises. There is no evidence that the market is contracting, and those in the sector believe that demand for English is high and will continue to be so. Adult Poles want to learn English for travel, work and emigration, but the English skills they achieved at school are not high enough. The adult market is still in demand, from those who want basic communication skills to those who work in specific sectors (e.g. IT or pharmaceuticals) with advanced specialised needs.

Interviewees from the sector thought the market needed to adapt, to provide adult learners with what they want – more communicative skills, specialised courses focusing on their vocational or professional area, or specific skills such as writing emails.

Interviewees reported that adults do not have the time to devote to studying English at home, and language schools need to offer courses to reflect this – flexible, shorter and using more technology.

What stands out in the Polish market is the focus on adults, and especially older adults, who learned Russian at school or who received less English instruction in the 1990s. Demand from this older group often comes from having children and grandchildren living outside Poland (who may speak English better than Polish). Many Polish grandparents travel abroad to look after their grandchildren during school holidays while their adult children are working, and they recognise that they can use English to communicate in European countries. The University of the Third Age was mentioned as filling this gap for this age group (there are over 40 in the Warsaw area).

The private sector has embraced more modern teaching methods and can offer more than the state school system – smaller class sizes, different ability level classes, more one-to-one time with the teacher, more focus on communication skills, libraries, debating clubs, and so forth.

The Polish market is also supported by parents sending their children to classes, although, as a proportion of demand, this appears lower than in the southern European countries. Parents recognise that English is an indispensable skill and, because of large mixed-ability school classes, want to improve their children's prospects. Poles of many social and economic classes are willing to pay for additional classes, either from a language school or a private tutor (a much cheaper option).

There is also a developing demand for sending very young children to English classes and at the other end of the scale, there is a high demand for revision courses, to pass school leaving exams at 18 (the standard exam at B1or the extended exam at B2).

'Innovation is key to adapt to changing demands from students ... Apps need to be harnessed.'

Michal Zajac, Co-owner,
Lublin Royal School of English,
Lublin, Poland

'Above a certain income level, everybody goes to private English schools ... there are parents who can't afford much, but they invest in their children.'

Justyna Martin MA, Director of Studies, Empik School Warsaw Centre (Junior), Poland

'English is the number-one language in the business sector.'

Barbara Baranska,
Polish Banks Association,
Warsaw, Poland

Certificates and accreditation

Demand for internationally recognised CEFR certificates is low in Poland. The Polish school system no longer accepts these in place of their own examinations, so few learners see the need to attain them unless they want to travel to countries that require them, or if they want to study abroad (though this is an expensive option for Poles).

Employers rarely ask for them, choosing to assess language skill themselves. In the 1990s, there was an initiative by the Polish finance sector to develop their own accreditation for English, but this was later abandoned, and employers often demand a degree in English for professional roles.

Employers' demand

Demand for good English has spread from multinational companies to other sectors. Interviewees reported that demand was perceived as high, and they believed this would continue. As a result, many young people choose to study English Philology at university, and they graduate with a high level of language proficiency. Employers are willing to take English graduates and then train them to be subject specialists (particularly in the finance sector).

'One of the key requirements of the job market now is English at least at upper intermediate level ... Ten years ago you only needed English if your job involved working with multinational companies. Now you must prove that your English is at a high level whatever the job ... Exports are up, the economy is growing and there is more international contact.'

Michal Zajac, Co-owner, Lublin Royal School of English, Lublin, Poland

In-house training seems less popular in Poland. It is the responsibility of the individual to improve their English. Sending staff abroad for intensive courses is prohibitively expensive. This explains the high demand for adults learning English in the private teaching sector.

Brexit and the demand for English

None of our experts seemed very concerned by Brexit. They believed that if it were to become more difficult for Poles to settle in the UK, they would simply travel to other countries (Germany, the Netherlands and Scandinavian countries) and use their English skills there. On the other hand, it was also suggested that Brexit might even increase the demand for English classes if the UK government introduced a language requirement for immigrants.

Polish people are looking in other directions now and the demand for English might change... fewer short courses for those planning to go to England but maybe more demand if the UK insists on a higher certificate.'

Michal Zajac, Co-owner,
Lublin Royal School of English,
Lublin, Poland

COUNTRY PORTUGAL

27%

Percentage of the population that speaks English (conversation level) 2012

417

Private English language schools

Date joined EU	01.01.1986
Size of population (2017)	10,309,600
Projected population (2030)	9,880,173
Population growth rate 2015–30	-4.77%

FACTS AND FIGURES

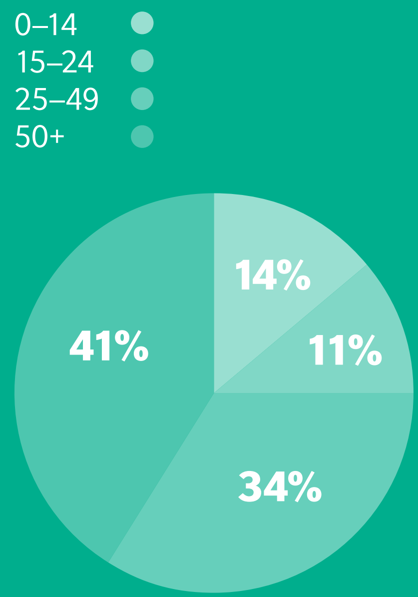
Economy

GDP per capita 2016	€16,900
Economic growth rate 2015	1.50%
Projected economic growth rate 2018	1.50%
Unemployment rate 2017	8.5%
Youth unemployment rate 2017	24.6%
Household dispensable income growth rate 2015	1.97%

Education

Mandatory school start age	6 years
Mandatory end-of-school age	18 years
Number of students in tertiary education 2015	337,500
Mean PISA score for reading in 2015	498
Number of students in Erasmus Programme 2012	6,484
Percentage of adults in education and learning 2016	9.60%

Breakdown of population by age (2015)



Foreign languages

English the mandatory second language in schools	No
Age at which students start learning first foreign language	6 years
Age at which mandatory learning foreign language ends 2016	17 years
Percentage of primary school pupils learning English	35%
Percentage of secondary school pupils learning English 2015	64%
Percentage with proficient knowledge of best known foreign language 2016	21%
Cambridge English Key (KET) pass rate 2016	100%
Percentage of lower secondary pupils learning two or more languages 2017	87%

Technology

Percentage of population with access to computers from home 2017	72%
Percentage of population with access to internet 2016	74%
Mobile phone penetration for internet use as percentage of internet users 2016	78%

See appendix for sources.

PORTUGAL

Improvement in the standard of English

Many interviewees reported that people's knowledge of, and ability to use, English is good in Portugal. They find English pronunciation and word stress easier than many other Mediterranean speakers, as it is closer to Portuguese.

As in other European countries, Portuguese people are in constant contact with English: from songs on the radio to English language programmes and films on the television which are subtitled, not dubbed. Unlike in other countries, most Portuguese people can now speak some English.

'When we opened, there were a lot of adults who had no English at all. It's noticeable in shops and restaurants that people are now a lot more comfortable speaking English than they were in the past.'

Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal

Experts suggest that the ageing profile of the Portuguese population may skew the statistics on proficiency levels:

'If you look at demographics, Portugal's population is very old. Most of them, 30–40 years ago, were learning French in school, not English, and this will have a knock-on effect, and if you look at English education recently, people under 40 have quite good English and will leave school at B1 or even B2 level. However, because the population is quite old, this might skew the data and show a lower level of national proficiency.'

Mariana Cunha, British Council, Portugal

'English has been the fastest-growing language in our country for 40 or 45 years. It used to be French, but in the early 1960s, English became popular – not British English, but what is now known as global English – it is very popular, and French has become the third-ranking foreign language in Portugal. Second is Spanish; German is very, very far behind.'

Alberto Gaspar, President, Portuguese Association of English Teachers

'The fluency of English has improved a bit. Not as much as the teachers and my association would like, but the fluency is growing and interest among children for English has been growing. This doesn't mean that they study it with hard work, but most of the English our children speak is acquired through mass-media, through television and so on, and American English is very popular too.'

Alberto Gaspar, President, Portuguese Association of English Teachers

A view of some experts in the private language teaching sector was that Portuguese adult learners were not all focused on becoming fluent or proficient speakers. They only set out to learn as much English as they needed. English was simply a tool of communication.

The increase in the proportion of people who know English is explained by changes in Portugal. There is more international travel (both to Portugal, from tourism and migration, and from Portugal, as the Portuguese commonly move abroad for work). English is no longer an indicator of social status or 'nice to have'. It is an essential tool for business, commerce and international communication. It is an important skill to improve employability prospects. Portugal's employment rate is high, but the employment rate of young graduates remains below the EU average.[131]

Informal learning and exposure to English play a significant part. A 2014 report[132] suggested that trips abroad, online gaming and new media channels expose young Portuguese children to English before they formally learn it in a school or preschool context. An earlier report on the spread of English language in Portugal[133] showed that, between 1989 and 2009, the number of English loan words in Portuguese media had doubled.

Image: Teachers conference

[131] European Union 2017b *Education and Training Monitor 2017 – Portugal.* Available online at: https://ec.europa.eu/education/sites/education/files/monitor2017-pt_en.pdf

[132] Tonoian, L (2014) *English Language Learning Inside and Outside the Classroom in Portugal.* Available online at: https://run.unl.pt/bitstream/10362/13616/1/Trabalho%20de%20projecto.%20Final.%20Lilit%20Tonoian%20(Didactica)%20(3).pdf

[133] Leslie, C (2016) *The Spread of English in Portugal: A contribution to an understanding of the phenomenon.* Available online at: https://www.researchgate.net/publication/265437888_THE_SPREAD_OF_ENGLISH_IN_PORTUGAL_A_CONTRIBUTION_TO_AN_UNDERSTANDING_OF_THE_PHENOMENON?enrichId=rgreqe07e36dd660564a8f0be643a5d407a2b-XXX&enrichSource=Y292ZXJQYWdlOzI2NTQzNzg4ODtBUzozOTgxNzUwMTA2MDcxMDRAMTQ3MTk0MzcyODg4Nw%3D%3D&el=1_x_2&_esc=publicationCoverPdf

English in mainstream education

Recent government measures aim to improve foreign language outcomes. Starting in 2015–16, Portugal has fully implemented a policy making English mandatory for all students aged eight.[134] The number of mandatory hours of English has also gone up.

While teaching foreign languages in primary school has not yet reached the level that the government would like it to be at, it has improved from a very low base, with several government initiatives aimed at retraining secondary school teachers to teach languages at primary school level.

Standards of teaching are improving, but it is difficult to overcome the challenge of large mixed-ability classes and very young children having the language maturity to take on a second language.

CLIL courses are not as popular as in other countries, and are currently only offered in some schools in large cities and in private schools.

Image: Storytelling for primary teachers

'Every student should have at least seven years of English language teaching during their secondary education. That's happening already, and it's still happening now - even with this government, who still realise the importance of English. It's a universal tool and everybody needs it. They should start when they're eight and continue for seven years.'

Alberto Gaspar, President, Portuguese Association of English Teachers, Portugal

'There's been a slow but noticeable improvement in the English in schools... There's a great deal of interest in improving the level of foreign languages in Portugal.'

Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal

[134] *Op cit.* European Union (2017b).

English-taught bachelor's degrees

Portugal has followed the trend of offering more university degrees taught in English. At Nova University in Lisbon, most of their undergraduate degree courses are already taught through English, especially subjects like economics and business.

The number of new, joint courses, co-created with international higher education institutions, has also increased.[135] Two of the top universities in Portugal, the University of Coimbra[136] and the University of Porto, now offer both bachelor's and master's programmes in English – these programmes are offered in areas as varied as Law, Physics and Forensic Sciences.[137]

'This is to attract foreign students; six to seven years ago, there was a boost of internationalisation in higher education in Portugal, and it's still something that's going on. Universities are trying to become even more international than they already are and one of the ways they are trying to do that is by attracting more foreign students.'

Fatima Dias, British Council, Portugal

[135] DGES – Directorate-General of Higher Education (2014) *Your Way To Portugal: A Guide for International Students.* Available online at: www.studyinportugal.edu.pt/images/guide.pdf

[136] Course catalogue. Available online at: www.uc.pt/en/ects/catalogo/

[137] English-Taught Master and Doctoral Programmes. University of Porto. See https://sigarra.up.pt/up/en/web_gessi_docs.download_file?p_name=F-725597310/english_taught_master_doctoral_programmes_uporto_2015.pdf

Private teaching and language schools sector

Private language schools continue to thrive. Younger learners and teenagers are now the largest market segment. This is down to a high interest and demand for English that currently is not being met by mainstream school provision. It is normal for children and young people to attend private language classes for many years, often for their entire school career.

Parents are behind the demand, recognising the importance of English and the inability of the school system to deliver a high enough level.

Adult demand for general group courses is declining. Busier lives, improved teaching in schools, and the increase in opportunities have affected demand. Adults want short (20–40 hour), tailor-made courses for specific purposes (such as for an overseas conference or trade fair, or medical, aviation, or legal English). Adults are not confined to the professions; other occupations (for example, builders and trades people) who come into contact with foreigners who live or have retired in Portugal also want English for their specific needs. Private language providers think this trend will continue.

Like Poland, another country with a large population working abroad, the rise in transnational marriages and relationships has produced older learners taking up lessons when they find themselves having English grandchildren or English-speaking in-laws.

Portugal was the only country where experts mentioned that learners preferred native English speakers to Portuguese English teachers. This was explained by a worry about Portuguese teachers making pronunciation mistakes or having an accent.

While it is common to use computers for the digital content supplied with coursebooks, there is not much demand currently from those who want to do the course entirely online. Digital learning has not yet become established.

A commercial entry point into Europe

Portugal is an entry point for business in Europe. It has seen a number of multinational companies set up bases in the country as it has become more favourable to international business.

International trade and tourism are important to the economy. The combined value of Portugal's exports and imports equals 79 per cent of its GDP,[138] and its industries have undergone significant changes in recent years. Its economic activity has increasingly diversified, while sectors such as electronics, energy and pharmaceuticals have experienced significant growth.[139]

Portugal has also seen significant growth in the tourism sector. In 2016, this growth had reached an annual rate of around 10.2 per cent in revenue.[140] Visits from the UK are driving this growth (the UK generated 17.5 per cent of the tourism revenue in Portugal during the first half of 2017). The USA is also an important origin market, with visits 37.3 per cent higher in the first half of 2017 than in the same period the previous year. The increase in bed nights and the high proportion of English-speaking tourists has increased the need for the tourist industry to be multilingual.

'The public sector and private sector are two parallel levels. Most of our students that belong to the public sector have complimentary classes in private schools all over the country. There are a lot of language schools. We say they are like mushrooms because they are growing almost every month.'

Alberto Gaspar, President, Portuguese Association of English Teachers, Portugal

'In ten years' time the adult learner will be a rare beast and the focus of their learning will be much more specific and focused.'

Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal

[138] Available online at: https://www.heritage.org/index/country/portugal

[139] AICEP Portugal Global (2017) Portugal – Basic Data: October 2017. Available online at: http://www.portugalglobal.pt/EN/Biblioteca/Documents/PortugalFichaPaisIngles.pdf

[140] *Ibid.*

'We used to get a steady stream of doctors and nurses who wanted an English course before going to the UK. This has dried up.'

Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal

Employer demands

Generally, a B2 level of fluency in English is considered enough for an employee to conduct calls and business activities in English. In entirely English-speaking companies, the level required of staff is more likely to be C1. Requirements are higher in the case of more senior roles – for example, the level of English required of someone who is about to be made partner in a foreign law firm in Portugal is C2 (almost native level).

However, because of the widespread assumption that young people speak English well, many employers have abandoned the practice of formal testing during the hiring process. This may be changing, however, and there is evidence of companies checking the proficiency levels of staff. For example, Ernst and Young has carried out language assessments of all its Portuguese staff so that the company's HR department has an understanding of the English capabilities of its staff.

Brexit

Portugal was the only country where Brexit appears to be having an impact. Although unlikely to affect demand for proficiency in English, Brexit has been cited as discouraging migration in some sectors.

However, as in other countries, the demand for English is larger than Brexit and the UK.

Image: Portuguese student

COUNTRY ROMANIA

31%

Percentage of the population that speaks English (conversation level) 2012

300

Private English language schools

Date joined EU	01.01.2007
Size of population (2017)	19,638,300
Projected population (2030)	18,023,954
Population growth rate 2015–30	-9.29%

FACTS AND FIGURES

Economy

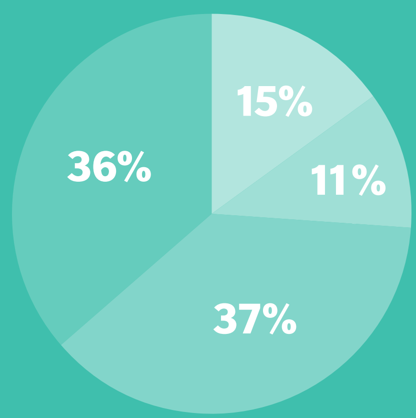
GDP per capita 2016	€7,700
Economic growth rate 2015	4.80%
Projected economic growth rate 2018	3.70%
Unemployment rate 2017	4.9%
Youth unemployment rate 2017	16.8%
Household dispensable income growth rate 2015	7.44%

Education

Mandatory school start age	6 years
Mandatory end-of-school age	17 years
Number of students in tertiary education 2015	541,700
Mean PISA score for reading in 2015	434
Number of students in Erasmus Programme 2012	4,578
Percentage of adults in education and learning 2016	1.20%

Breakdown of population by age (2015)

0–14
15–24
25–49
50+



Foreign languages

English the mandatory second language in schools	Yes
Age at which students start learning first foreign language	8 years
Age at which mandatory learning foreign language ends 2016	19 years
Percentage of primary school pupils learning English	83%
Percentage of secondary school pupils learning English 2015	100%
Percentage with proficient knowledge of best known foreign language 2016	15%
Cambridge English Key (KET) pass rate 2016	100%
Percentage of lower secondary pupils learning two or more languages 2017	95%

Technology

Percentage of population with access to computers from home 2017	72%
Percentage of population with access to internet 2016	72%
Mobile phone penetration for internet use as percentage of internet users 2016	70%

See appendix for sources.

ROMANIA

English language teaching in state schools

Long attached to and influenced by French culture,[141] Romania shifted from teaching French as a first language choice to teaching English post-1989. French gradually lost ground to English as the number of English language textbooks grew with the liberalisation of the publishing market.

The education sector is in permanent transformation, with new legal regulations in the educational field being implemented almost annually. While teaching of English starts early, some challenges, such as remuneration, remain. Teacher salaries are increasing, but attracting high-quality teachers in disadvantaged schools remains difficult, and salary progression can be very slow.[142]

At university level, courses taught partly or entirely in English are popular but limited at the moment. However, as Romania invests in becoming more of a regional educational hub, it is expected that the number will go up. The Faculty of Political Science at the University of Bucharest teaches in English, and STEM subjects such as medicine or engineering may expand their provision of English-taught courses in order to attract students from outside Europe. There is currently a substantial number of Middle Eastern students who come to study medicine in Romania and, while they are offered a foundation year which allows them to learn Romanian, it is likely that offering specialised subjects in English would attract bigger numbers. Furthermore, the medical tourism industry is also growing, especially in the dental sector.[143] Incorporating industry-specific English language teaching alongside traditional university courses in these sectors could help boost demand for such services.

'The faculty prepares students for teaching positions in secondary schools, editing positions in media, translation studies programme, working as translators and interpreters in various fields, working in companies (English for business, English for law). We offer a broad range of opportunities for them when they graduate.'

Professor Octavian Roske, University of Bucharest, Romania

'Before 1989, there was more of a balance between French, German and English, but today English is by far the first and the most favourite language... Students in secondary school tend to choose English.'

Professor Octavian Roske, University of Bucharest, Romania

'The generation that did not learn the English language in primary and secondary school is nearing retirement, so all those who went to school post 1989 were taught English to some extent. When I first entered the educational system in Suceava (town in north-eastern Romania), there were 25 of us. Today there are 400 of us.'

Dana Postolache, Petru Rares National College, Suceava, Edumax Centre, Romania

[141] Tirban, N (2012) *The Future Of Teaching English Language In Romania And Globalization.* Available online at: https://ac.els-cdn.com/S1877042813000414/1-s2.0-S1877042813000414-main.pdf?_tid=d8b5d22c-0a56-11e8-9a36-00000aab0f27&acdnat=1517823055_3e1bde4b9b8395cc93463d3bef56bc9f

[142] European Union (2017c) *Education and Training Monitor 2017 – Romania.* Available online at: https://ec.europa.eu/education/sites/education/files/monitor2017-ro_en.pdf

[143] International Medical Travel Journal (2013) Dental Tourism Develops In Romania. *International Medical Travel Journal* 17 January 2013. Available online at: https://www.imtj.com/news/dental-tourism-develops-romania/

'Everyone is used to speaking some English. Taxi drivers will speak it to you, and so will merchants at the farmers' market.'

Agata Stefan, British Romanian Chamber of Commerce

Private provision: big players and one-to-one lessons

As Romania's integration within the EU deepens, and the country becomes more open to internationalisation, the ubiquity of English loanwords in the press, academia and the business sector has not been met with much resistance.

Generally, a significant portion of adult courses are geared to those who were educated before 1989 and who have lower levels of proficiency. However, there has also been a proliferation of private nurseries and primary schools which incorporate English into the curriculum from a very early age. The number of children enrolled in private secondary school has decreased since 2012, but the number of children enrolled in private sector preschools and primary schools has gone up. It is not uncommon for private language schools and private schools to use teachers from the public sector.

Figure 12: International trips registered at Romanian borders 2012–2015

Graph produced from data from: (2015) INSSE, Romania in Figures (p17). Available online at: www.insse.ro/cms/files/publicatii/Romania_in_figures_2015.pdf

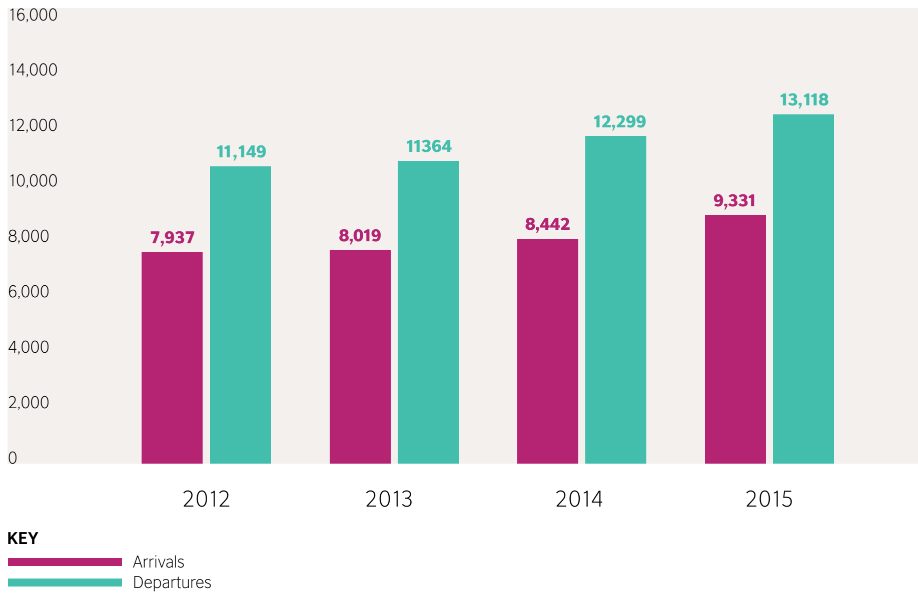
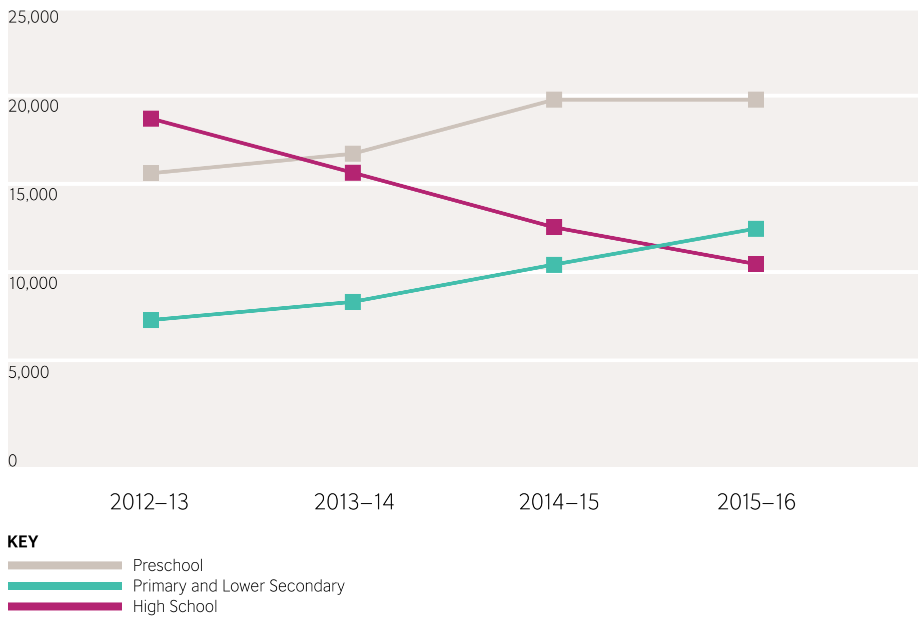


Figure 13: Private sector – enrolled population by level of education, 2012–13 to 2015–16

Source: INSSE, Romania in Figures. Available online at: www.insse.ro/cms/files/publicatii/Romania_in_figures_2015.pdf



Romania has a high rural population of around 46 per cent, the highest of all the seven EU countries in the study. Approximately 31 per cent of Romanians living in cities claimed they spoke at least one foreign language, and for rural settings the percentage dropped to 19 per cent, while in towns and suburbs one in four inhabitants is currently learning a foreign language.[144] The importance of regional fragmentation, and the urban–rural split, is exemplified by the need for language schools to be set up in smaller towns, so that students do not have to travel to major cities to take Cambridge examinations, as was the case a few years ago. Such is the case of Edumax, based in Suceava (north-eastern Romania) and Simone Educational Center (based in Craiova, around 200 km from Bucharest).

The private English language teaching sector includes international teaching centres, such as the British Council and International House, alongside smaller, local language schools. In small towns, children are more likely to receive private English tuition in the private tutor's home (also known as *meditatii.*)

While there is some use of digital resources, the face-to-face format of teaching English remains strong in Romania, with parents insisting on their children receiving a more 'classic' style of education. Any digital learning that occurs will usually happen in the learner's spare time and will contribute towards their language skills through informal learning.

Image: Italian lesson

'Kids don't really turn on their computers these days. If something is on mobile, fine. If it's not, it may as well not exist.'

Dana Postolache, Petru Rares National College, Suceava, Edumax Centre, Romania

'As with the commercialisation of every product, once the demand is there, the supply also emerges. However, although the supply and provision of private English lessons is there, and the market seems to have been flooded with providers who offer this in every possible format, the truth is that the quality of a significant number of these courses has not been verified and cannot always be vouched for.'

Diana Deleanu, University Lecturer and Law Partner

[144] http://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_386_en.pdf

'20–30 years ago, students came to the university to become proficient in English. Today this is not enough. For example, around 10–15 per cent of secondary school students in Romania will go to the UK to study. A significant number of my MA students found jobs abroad because they were graduates of a programme taught completely in English. They found very good jobs with great companies.'

Professor Octavian Roske, University of Bucharest, Romania

[145] INS (2014) *Migrația Internațională a României.* Available online at: www.insse.ro/cms/files/publicatii/pliante%20statistice/Migratia_internationala_a_Romaniei_n.pdf

Emigration among the highest drivers of demand

Emigration is one of the highest drivers of demand for foreign languages. Between 1989 and 2012, the transition towards democracy produced an unstable social and economic environment and so the size of the Romanian population decreased by 3.1 million,[145] as Romanian workers moved abroad in search of better wages. Initially, the most popular destinations were Italy and Spain, due to the language proximity (Romanian, Italian and Spanish all being Romance languages). The UK, meanwhile, has grown in popularity, especially after Romania's inclusion in the European Union in 2007.

Brexit is considered unlikely to have an impact on the necessity and demand to learn English for international mobility purposes and for economic reasons:

'This demand will remain, and even though the possibility of studying in the UK may be harder to attain in the future due to the introduction of visas or additional fees, the typical Romanian student who goes abroad is entirely financed by their family. Those who can afford it will make the effort to finance their child's education – it has happened before, and it will happen again. I don't think the possibility of Brexit is going to affect the demand for English language learning in Romania. I do not think its influence will be significant, and this is because the demand for English language teaching and learning was present even before Romania joined the EU, which only happened ten years ago.'

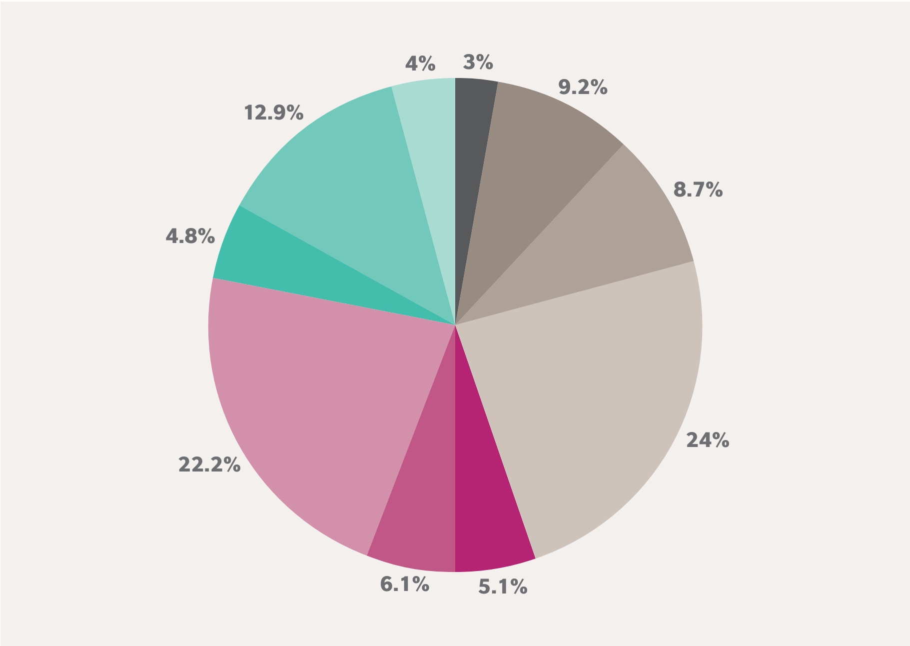
Diana Deleanu, University Lecturer and Law Partner

English for special purposes: a professional necessity

In the context of the economic transition process, Romania's labour market is undergoing significant changes. Relatively low labour costs and a strong cohort of IT, finance and accounting graduates, with varied language skills, has made Romania a favourable location for business process outsourcing and support services – a sector valued at over €1.5 billion.[146]

Companies that outsource business support services to Romania often use English (in some cases Spanish) as a working language, with some employees using the language on an everyday basis, especially if they work in customer service and are serving customers from another country.[147]

Almost one in four higher education students currently choose to do a degree in business, administration and law – sectors that are very likely to require international language skills to help graduates operate in the workplace.



ISCED-F1 Fields of Education and Training

KEY

- Education
- Arts and humanities
- Social sciences, journalism and information
- Business, administration and law
- Natural sciences, mathematics and statistics
- Information and communication technologies
- Engineering, manufacturing and construction
- Agriculture, forestry, fisheries and vetinary sciences
- Health and welfare
- Services

Figure 14: Students in tertiary education institutions, by field of education and training in the 2015–16 academic year

Source: INSSE, Romania in Figures. Available online at: www.insse.ro/cms/files/publicatii/Romania_in_figures_2015.pdf

Conversational English is usually required in the majority of the services sector, whether the candidate is applying for a role as a receptionist or a senior executive.

While the level of general English taught and spoken at secondary school level may be higher than the European average, there is room for additional provision of technical English – integrating vocabulary and conversational classes around topics such as world affairs or business could be beneficial if done early, before students and graduates enter the job market.

[146] Bohr, J (n.d.) The Business Process Outsourcing (BPO) Market in Romania. Available online at: https://cba.associates/the-business-process-outsourcing-bpo-market-in-romania/

[147] Available online at: http://romania.cgsinc.com/about-us/?lang=en

'The quality of teaching is high. However, I believe that general English is not enough when you are preparing young students for the future. While they may be able to have a great nuanced conversation on the merits of Shakespeare, this is not going to be useful for them if their job involves engineering a bridge.'

Agata Stefan, British Romanian Chamber of Commerce

While many job advertisements are placed entirely in English (as seen in Figure 16), it is not common to have a formal English language assessment during the hiring process.

At the civil service and/or public administration level, candidates are not always tested when they enter a new role, and there is a need for increased professionalisation in this area.

'Some jobs require candidates to attach a language certificate to their CV, but they are usually at a more senior level. If the role is not particularly senior, the interview may take place (partially) in English, and the hiring manager will be able to tell how good someone's English is.'
Agata Stefan, British Romanian Chamber of Commerce

An example of a Romanian-based organisation that offers in-house English lessons is KPMG Romania, which was initially an almost entirely foreign company but attracted an increasing number of Romanian staff over the years.

'The courses I do are focused on two things – enhancing the level of English, which is pretty good in the multinational company environment, by refining the use of English to bring it closer to a native speaker standard, and improving writing skills by helping people write more clearly and concisely. Companies like KPMG deal with a lot of technical terminology, so one of the things that I am trying to teach is how to explain technical, tricky subjects in plain and simple language.'
Mark Percival, Business Writer, KPMG, Romania

The focus of the in-house lessons at KPMG is to help students go beyond proficiency and achieve a near perfect level of English, where recurring mistakes are gradually stamped out.

'We focus on typical mistakes made by native Romanian speakers, which I can do because I speak Romanian and can see where things are coming from. So grammar issues, but with a specific focus – articles, word order, all the sorts of things that can come up quite frequently. In terms of writing exercises, I get people to write an email to a potential client. This is a test not only of their grammar, but also their writing skills: how to structure sentences and how to be concise.'
Mark Percival, Business Writer, KPMG, Romania

'If it was up to me, I would organise niche, speciality courses. I think this is one of the most important challenges for the future of taught English in Romania. Either in the medical field or aimed at specialist subjects where a lot of technical language or jargon is used. If this could happen while learners are still in secondary school, that would be ideal.'
Agata Stefan, British Romanian Chamber of Commerce

Figure 16: Romanian job advertisement

Source: Călărașu, C (n.d.) Globalizare lingvistică și anglicizare. Available online at: http://ebooks.unibuc.ro/filologie/dindelegan/25.pdf

Job advertisement

LOUIS BERGER GROUP 50 years of pioneering in 65 countries is seeking **Senior Engineers** with at least 10 years' experience in design and / or construction supervision, FIDIC contract management and / or control and quality assurance during construction, in the following sectors (good english skills are necessary for all positions)

- **Transport infrastructure** (highways, railways, ports, navigable waterways, airports and related structures) – we are one of the world's leaders in this sector;
- **Public and industrial buildings** (schools, hospitals, office, industrial parks, warehouses, plants etc.)
- **And Economists/Planners** specialising in development of a variety of economic sectors....

COUNTRY SPAIN

22%

Percentage of the population that speaks English (conversation level) 2012

4,000

Private English language schools

Date joined EU	01.01.1986
Size of population (2017)	46,529,000
Projected population (2030)	47,110,106
Population growth rate 2015–30	1.42%

FACTS AND FIGURES

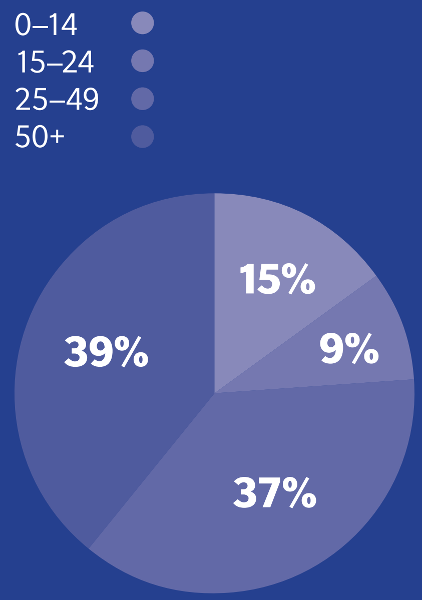
Economy

GDP per capita 2016	€23,800
Economic growth rate 2015	3.30%
Projected economic growth rate 2018	2.10%
Unemployment rate 2017	16.7%
Youth unemployment rate 2017	38.7%
Household dispensable income growth rate 2015	2.80%

Education

Mandatory school start age	6 years
Mandatory end-of-school age	16 years
Number of students in tertiary education 2015	1,936,900
Mean PISA score for reading in 2015	496
Number of students in Erasmus Programme 2012	39,545
Percentage of adults in education and learning 2016	9.4%

Breakdown of population by age (2015)



Foreign languages

English the mandatory second language in schools	No
Age at which students start learning first foreign language	6 years
Age at which mandatory learning foreign language ends 2016	18 years
Percentage of primary school pupils learning English	99%
Percentage of secondary school pupils learning English 2015	99%
Percentage with proficient knowledge of best known foreign language 2016	30%
Cambridge English Key (KET) pass rate 2016	98%
Percentage of lower secondary pupils learning two or more languages 2017	46%

Technology

Percentage of population with access to computers from home 2017	78%
Percentage of population with access to internet 2016	82%
Mobile phone penetration for internet use as percentage of internet users 2016	94%

See appendix for sources.

SPAIN

Demand for English is high and has been since the 1980s, when English replaced French as the first foreign language taught in schools. Spanish students are generally considered to be enthusiastic learners, particularly in the younger age groups.

Strong government commitment and initiatives

Spain has an explicit priority to improve foreign language learning and improve the employability of young people through education, training, foreign language learning and information technologies.[148] A series of central and regional government interventions since the mid-1990s have resulted in language proficiency levels of younger people improving dramatically, particularly for the under-40s.

English is a compulsory subject from the start of mandatory primary school (educación primaria) until the end of mandatory secondary school (educación secundaria) (six to 16). In reality, however, most start learning in pre-school (educación infantil), at three years old, and continue into the optional secondary education (bachillerato) (16–18).

In this study, Spain stands out as the nation with the most developed government-sponsored initiatives for improving English language proficiency. Every region in the country now has a bilingual or a CLIL programme.

In 1996, the British Council signed an agreement with the Spanish Ministry of Education to introduce an integrated curriculum in Spanish state schools. Intended to improve levels of English, and encourage awareness of the diversity of both cultures, a main driver was also to bring the benefits of bilingual education to the wider state sector for the first time. Following the success of this project, multiple initiatives began in regions across Spain, which, when combined with the already existing plurilingual programmes in Catalonia and the Basque country, have meant that a huge number of children now benefit.

The joint Ministry of Education – British Council Bilingual Education Programme (BEP) started with 43 schools and 1,200 pupils, and today there are 87 primary schools and 53 secondary schools across Spain in the programme. The programme has grown, drawing children from a range of socio-economic, ethnic and linguistic backgrounds. A significant amount of time is allocated to learning in English, roughly equivalent to 40 per cent of the school curriculum, and at least three subject areas are taught in English.

An independent, large-scale evaluation of the Ministry-British Council programme carried out in 2010 concluded that the majority of students were gaining greatly from their bilingual education in terms of levels of attainment in their classroom studies, English language, Spanish language and International GCSEs.[149]

'Here in Castilla-La Mancha we have 2,500 primary and secondary school teachers who are equipped to deliver their courses (maths, art, science, social studies, etc.) in English. We have around 15 per cent of our teachers in this skill category. A continuous culture of English skill improvement has been installed.'

Lucio Calleja, Head of Language Services, Government of Castilla-La Mancha, Spain

[148] www.webgate.ec.europa.eu

[149] *Ibid.*

'Our young people are being incentivised all the time to prioritise language skills. This concept is at the heart of the evolution of our regional education policy. We keep on taking things up a notch.'

Lucio Calleja, Head of Language Services, Government of Castilla-La Mancha, Spain

In the Madrid bilingual programme, the best schools aim to get students to a B1 level at 12 years of age and C1 by 18 (compared with an average of A2 at 15 in non-bilingual schools). Schools are popular with parents and over half of schools (over 600) are in its bilingual programme, working at every level of education from age 3 to 18.[150]

To underpin this policy, there have been initiatives to improve English language skills of specialist English teachers as well as generalist teachers (in primary and pre-school) and subject teachers in the CLIL programme. In the Madrid area, continuing professional development for teachers includes summer schools, sponsoring teachers to study in the UK, Ireland and Malta, and additional post-qualification training for teachers.

Behind these initiatives to improve English language skills is a strong political and economic motive to make Spain more outward-looking, and international, and to attract more inward investment and increase its competitiveness. Globalisation has increased the need for English in the Spanish economy.

Improving levels of proficiency

All interviewees agreed that younger people (particularly the under-30s who have benefited from government initiatives) speak English much better than those a generation ago. In 2012, just 22 per cent of Spaniards said they knew English well enough to hold a conversation, and 12 per cent to follow the news on television or radio.[151] Recent research in 2017,[152] carried out in the Madrid region, looked at the outcomes of students (with an average age of fifteen and a half) in schools in the bilingual programme and compared them with those not in it. This indicated that proficiency levels were high (overall school and student participation in Madrid exceeded the English Impact international participation standard of at least 85 per cent of sampled students in 85 per cent of sampled schools), and students from bilingual schools did better than those in non-bilingual schools across all skills. 34 per cent of students in bilingual schools achieved a B2 or C CEFR level in the English language assessment (upper immediate or advanced) and 38.5 per cent achieved a B1 CEFR level (intermediate).[153]

Despite these impressive results there is little complacency. The research indicated that listening was the skill with the highest levels of achievement, and speaking the lowest.[154] Across the board, our interviewees in Spain believed that more remains to be done to improve proficiency levels. This view was particularly strong from employers and those in the education sector.

In the past, English was needed primarily for the large tourism industry in Spain; now it is essential for other sectors, and particularly the large business and banking industries. There are many multinationals in Spain where staff are expected to use English as their day-to-day language, and a major focus on import and export also increases the need for English.

There is now more opportunity to hear and use English in Spain, particularly in the workplace. The subtitling industry in Spain is well established, as are streaming services such as Netflix, giving the opportunity to watch films in English. US and UK music is popular in Spain, as is television culture, although it is often watched in Spanish.

[150] Dobson et al. (2010) *Bilingual Education Project Spain: Evaluation Report.* Available online at: https://www.britishcouncil.es/sites/default/files/bilingual-education-project-spain-evaluation-report-en.pdf

[151] http://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_386_en.pdf

[152] https://www.britishcouncil.org/sites/default/files/g303_03_english_impact_report_madrid_web1.pdf

[153] Shepherd, E and Ainsworth, V (2017) English Impact: An Evaluation of English Language Capability. Available online at: https://www.britishcouncil.org/sites/default/files/g303_03_english_impact_report_madrid_web1.pdf

[154] *Ibid.*

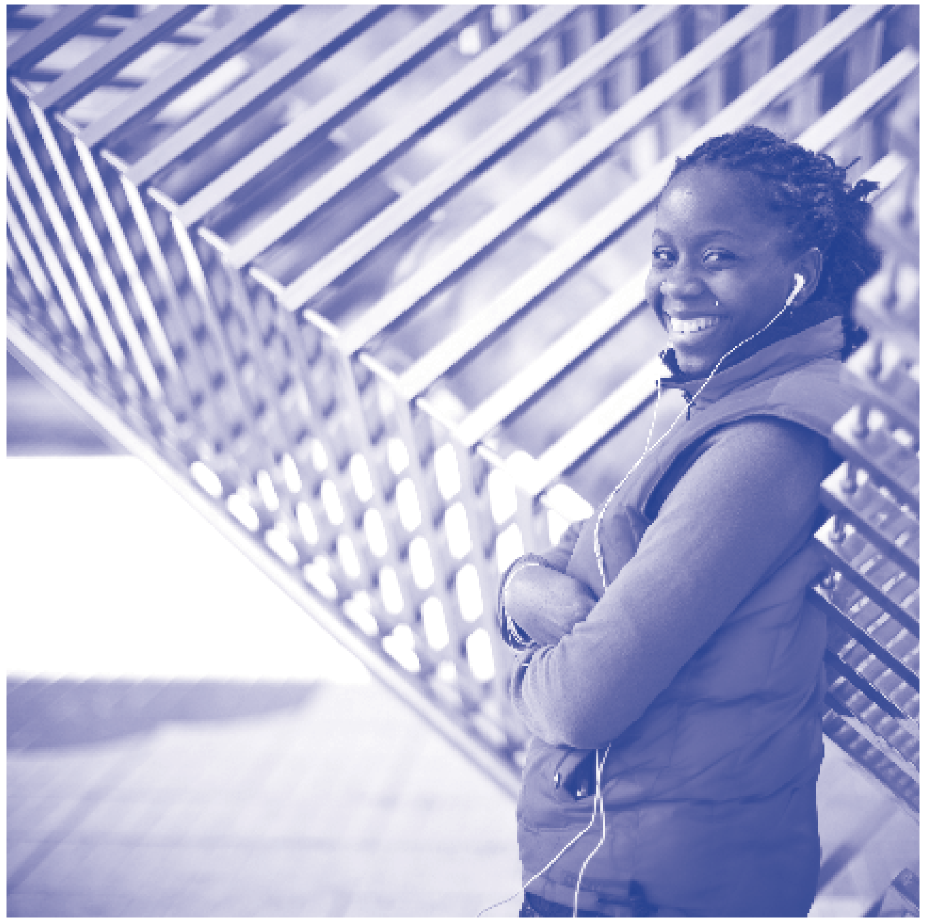
A strong social and cultural trend for learning English early

Demand for English is particularly strong from parents, with the widely held belief that the earlier children start learning, the better. Spain has the most developed market for very young learners in this study. The pre-school market for English classes is well developed, with English sessions as a standard part of the curriculm in kindergarten and pre-school. This demand has been increased by the growth in the birth rate (from 1.14 children in 1996 to 1.32 in 2015), together with more parents recognising the benefits of English proficiency through their own experience, and a belief in the advantages of total immersion at a very young age.

Learning English is extremely popular for older children and young people, and it is normal to attend private English classes outside school for many years. Most universities require a level of English as an entry requirement, and some even require a B2 level to graduate (although this is not always adhered to, and varies across the autonomous regions). Good English is a common requirement for a graduate-level job.

Youth unemployment is still high (38.7 per cent).[155] The percentage of young adults who continue to study after finishing their mandatory education is growing at a faster pace in Spain than in other countries (in 2011, 86 per cent of 15–19 year olds and 26 per cent of 20–29 year olds were in education).[156] Between 2007 and 2008, and between 2013 and 2014, there was a 26–50 per cent growth in the number of Spanish students taking part in the Erasmus Lifelong Learning Programme, and in 2013–14 over 35,000 Spanish students studied or did a work placement abroad under the Erasmus Programme.[157] This was the highest number in Europe. In 2016–2017, 8,820 Spanish students came to the UK to study at a higher education institute (an increase from 6,005 in 2012–13).[158]

Image: Spanish student



'The younger the better... The demand for English is work driven... English is a safety blanket if you need to leave Spain... middle-class parents and upwards see it as an absolute necessity... working-class parents tend to leave it until their children are a little bit older.'

Alison Bancroft, Kids&Us, Spain

'It's a way of making their kids internationally competitive and mobile. In Spain English can be a factor in getting a job, whether you need it or not.'

Mark Levy, Head of English Programmes, British Council, Madrid, Spain

[155] https://www.statista.com/statistics/266228/youth-unemployment-rate-in-eu-countries

[156] http://www.oecd.org/education/Spain_EAG2013%20Country%20Note%20(ESP).pdf

[157] http://ec.europa.eu/dgs/education_culture/repository/education/library/statistics/erasmus-plus-facts-figures_en.pdf

[158] https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-student-statistics/location

'English is not a language. It is a tool for a better future.'

David Cervera Olivares, Deputy Director, Innovation Programmes, Department of Education and Research, Madrid Regional Government, Spain

An essential skill for employment

Previously, the demand for English was concentrated within the professional or middle socio-economic groups. Now the requirement for good English is a skill that cuts across all social groups, and even more after the economic crisis in 2012, when more Spanish people went abroad to seek work.

The bilingual programme, popular in mainstream schools, is now expanding into vocational schools in recognition of the fact that technical trades, IT specialists, administrators, and healthcare professionals, among others, need English as much as graduate professionals. Business-led initiatives in vocational education are pushing for higher levels of English, and apprenticeships (Formación Profesional Dual) now often include an element of English.[159]

Following the economic crisis of 2012, Spain is now back to economic growth. The industrial sector remains export-oriented, fuelling the demand for English and, as Susana Caceres of Interparking states:

'English is indispensable.'
Susana Caceres, Human Resources, Interparking, Hispania SA, Barcelona

Employers, however, report that school leavers do not have a good enough level of English for business life.

'English language teaching in our Spanish schools has indeed improved a lot over the years. But it still has some way to go... Our schools must do better, though it's good that we are teaching English to even small kids now.'
Rafael Cubero Saiz, Human Resources Manager, Tecnatom, Spain

University graduates are often better, but multinational employers need staff, and particularly at a managerial level, who are near-fluent speakers, able to converse, present and write business plans in English. Employers from Spain were clear that English is the most important language as far as business is concerned, but finding suitable candidates can be difficult.

'Sometimes it's difficult to find the right candidate with the right previous background, skills and good English.'
Daniel Diez, Human Resources Business Partner, Elavon Merchant Services, Spain

An approach that stood out was the large-scale use of in-house training. In Spain, it is common for employers to top up their employees' English with training, usually with a native speaker who comes into the company for in-house training (often focusing on communication skills), or by having a contract with an external English language provider.

'If anyone in our teams needs to improve the grasp of English, we run intensive internal courses – sometimes for three or four hours in the morning or even at lunchtime. We do make things intensive (but maybe a bit lighter for the lunchtime sessions).'
Rafael Cubero Saiz, Human Resources Manager, Tecnatom, Spain

Large employers in Spain also stand apart in sponsoring employees to go to English-speaking countries for intensive courses.

[159] https://www.mecd.gob.es/educacion/mc/fse/actuaciones/fp-dual.html

Image: Engineering building, UPV University, Spain.

‘The majority of our employees have lived or studied abroad to get good English… we (Spaniards) have been forced to get out of our comfort zone. There is no option but to leave the country.’

Daniel Diez, Human Resources
Business Partner, Elavon Merchant Services, Spain

A large private language market

Educational reforms and initiatives have increased the quality, number of contact hours and number of years of studying English. In areas where the bilingual and CLIL programmes are well established, we have seen that the levels of English among young people is increasing dramatically (attaining B1/B2 on average, and up to C1/C2 in areas where the programme is better established) as they progress through the school system, through further education, and eventually into work. On average, however, Spanish students in secondary school receive around 120 hours of English instruction a year,[160] and this does not produce the level of proficiency required by employers.

The private language teaching sector in Euorpe is large. The largest number of private English schools (estimated to be 4,000)[161] is in Spain. Interviewees from the private sector agreed that overall the demand for adult courses had declined, particularly for beginners courses, and that the remaining demand is now more towards upper-intermediate and advanced levels, as well as more specific vocational English for commercial and business sectors, in particular, technology and medicine.

There is still a very large evening school market. But there are signs that adults, with ever-busy lives, are looking to move away from the traditional evening course schedule of two or three classes a week or weekend courses delivered over an academic year. They seem to be looking for shorter and/or more flexible models as well as vocational content that is tailored to their needs. Offers with smaller class sizes and more self-study (digital technology was mentioned often) appear to be more attractive.

The market for children's courses is particularly strong and competitive. One relatively new entrant, Kids&Us, has focused on getting close to their target market with 350 schools across Spain. This sector also seems to be embracing new technology as a way to appeal to younger learners.

Private providers are aware that they need to develop products that provide students with more flexibility and options around attending when it is convenient, while at the same time maintaining continuity of studies. In this respect, schools are developing online tools for home-learning, self-study exercises and homework.

Private language schools are more likely than mainstream schools to focus on communication and have modern learning spaces (for example, the use of hubs, etc.), instead of a teacher in front of rows of learners. Some learners are switching to Skype classes and other online provision offered by the language schools. There is still a sense that students continue to value face-to-face contact, and many students not only appreciate the sociability of attending classes, but also benefit from the discipline of having to come to class.

Spain differed from other countries in having an established British School education sector (following the British system and taught only in English). There are 110 British Schools in Spain, with over 60,000 pupils. Indeed, these schools are not catering to the large ex-pat community: 60–70 per cent of students in British Schools are from Spanish families.

Paradoxically, British Schools did well during the recession, as middle-class families opted out of private Spanish schools and chose British Schools to ensure fluency and enhance their children's opportunities to work and study abroad, or to improve their employment prospects in an ever-competitive market. Parents are said to like the way English is taught in the private sector and British Schools. The approach is less traditional, with an emphasis on the practical and communication skills rather than linguistic structure.

'The state school system is propped up by a large number of small private English language schools.'

Alison Bancroft, Kids&Us, Spain

'Our approach is more hands on, more practical, less rote-learning and we're not controlled by textbook publishers.'

Adrian Massam, National Association of British Schools in Spain

[160] Op cit. European Commission/EACEA/Eurydice (2017).

[161] Vidales, R (2014) La 'burbuja lingüística' dispara el fraude en las academias de idiomas. El Pais 12 June 2014.

Technology

Many of the interviewees from the private language teaching sector talked about technology being a challenge that could affect demand either positively or negatively. Interviewees were less sure of what that technology might be.

Learning through mobile devices is growing in Spain. Interviewees thought that, while digital technologies could help enhance the learning experience, they would not replace the need for expert instruction. To date, moreover, many digital products remain relatively poor, sometimes not much more than a textbook on a screen. However, Duolingo, British Council and BBC online resources are popular, and young teachers in the state sector are using a wide range of teaching apps and online tools.

In conclusion, there was a recognition that it is vital for the English language teaching profession to be driving the development of digital technology for the sector, rather than responding to what the publishers and digital developers think the sector needs.

Image: Spanish student

Future demand

There has been a long-held belief in Spain that the Spanish learn English but fail to master it. Many of our interviewees believed that this was no longer the case, but that learning English and speaking it well took considerable effort. The Spanish take English proficiency seriously, and more often than not this involves an individual investing in improving their skills by studying privately, studying abroad, or going to an English-speaking country for work.

Having English was a safety net for those affected by the recession who needed to leave Spain to look for work. Economic recovery might increase demand for English as Spain operates in an ever more globalised economy. In this respect, it was not thought that Brexit would affect demand for English. Currently a lot of young Spaniards go to the UK to work, but the globalisation of English is bigger than the UK; young people will go to other countries, such as the Netherlands, Italy, the USA and Ireland, and they will still need English. Some interviewees thought that the demand for German might increase a little if Spaniards chose to go there for economic reasons as an alternative to the UK.

All interviewees agreed that the sector will need to change. There will continue to be a school sector, although an increase in government initiatives to improve English in schools even further could pose a threat to this market. Currently, even where bilingual education programmes are most established, they have not yet produced enough fluent speakers, but there is an expectation that as bilingual / CLIL programmes permeate the whole student life-cycle, this will change and standards of English of school leavers will rise. The challenge for the sector is to develop a product that is complementary to bilingual education rather than losing this large youth market.

Meanwhile, the adult market needs to become more niche, specialised, work and communication focused. The demand from the business world remains high. German and French are not seen as competitors. The business community is the driver for English demand.

The consensus overall from interviewees was that the future demand for English in Spain would stay the same, or even increase.

'There is absolutely no chance that English will lose ground in the business world to German or French or any other language... Globalisation is with us and English is its language.'

Rafael Cubero Saiz, Human Resources Manager, Tecnatom, Spain

Image: Spanish teachers

APPENDICES

APPENDIX A: RESEARCH APPROACH

Aim of research

The aim of the research was to gain an understanding of anticipated levels of demand, market size and market characteristics for English language teaching/learning provision in EU Europe by 2025 and beyond.

The sample

For this study, seven countries were chosen by the British Council to reflect different markets and contexts representing the demand and supply of English language in Europe.

1. France
2. Greece
3. Italy
4. Poland
5. Portugal
6. Romania
7. Spain

Stakeholder groups

The research focused on four key stakeholder groups involved in the supply of or the demand for English language teaching. These were:

1. **state/public sector education providers.** This group included national and/or regional government school education departments, key organisations of private (or private/public partnership) schools and higher education institutions (universities, teacher training centres) and/or national or regional controlling bodies
2. **private English language teaching sector.** This covered private language schools that provide mainly face-to-face classes to groups of students or one-to-one tuition, as well as British Schools providing a private education in English broadly following the UK education system
3. **digital and/or blended private sector English language.** This included app developers, providers of self-paced online courses, e-publishers, mobile services and virtual classroom/teachers
4. **employers.** Major national and international companies, trade organisations, chambers of commerce, etc.

Research methods

The first stage of the research was an **immersion stage**. Interviews were carried out with a range of internal British Council stakeholders, in order to identify the strategic underpinnings of the project, their individual involvement with, and expectations of, the project, how they wanted to use the findings, and any assumptions or thoughts that might influence the project.

To capture a snapshot of what was happening in the English language teaching market in each of the countries, we carried out an online survey of British Council marketing managers.

The main body of the study then took a mixed-method approach, combining desk research/literature review, quantitative analysis of secondary data, and qualitative research.

Desk research/literature review

A thorough literature review was undertaken to:

- establish the current market size for English language teaching in the seven countries
- establish the current structure for English language teaching
- identify a target list of potential respondents for the qualitative stage.

The main sources of data are listed in Appendix B, and other sources are referenced throughout this report.

Quantitative analysis and modelling

To get an in-depth understanding of what was anticipated to happen in each of the countries by 2025, forecasts were created for the years 2015 to 2025. The key drivers of the forecasting models are demographics (i.e. the change in population by country and by age group), and two models were created, each forecasting something slightly different.

Accurately quantifying the future demand for English in Europe is complex because there is no baseline measure or standard method for measuring present demand. Demand for learning English is made up of four different sectors:

- school students formally studying English in mainstream education
- students studying English in tertiary education
- adults studying English as an extracurricular activity (either formally in a college, Third Age university, or language institute, or informally through private classes, self-directed learning or using digital means)
- adult employees studying English provided by their employer (in-house or paid-for external courses).

To forecast the future demand from school students, we use birth rate data from each country to predict if the numbers of children and young people studying English will change by 2025.

Eurostat collects data on the second group – the number of students studying at tertiary level, by country and by broad subject area. There is data for the number of students who study 'languages', but there is no data at an individual language level. We can, however, use evidence from other sources to estimate the proportion of tertiary-level students studying languages who study English.

There is no comparative dataset for adults that gives reliable data on the number of adults studying English, their age breakdown or their proficiency level. The most comprehensive data was found in a 2012 special report carried out for the European Commission.[162] This was a large-scale cross-European survey that gave data on the percentages of people who can speak English and their self-assessed proficiency levels by country. This source has been used to build the model, along with insights from the qualitative study and desk research to adjust the demographic data for each country. The downside of this data is that adults are treated as being aged 15 and above, rather than 18 and above (the typical school leaving age in Europe).

Qualitative research

The qualitative stage of the research used British Council contacts and desk research to produce a list of potential recruits in each of the four stakeholder groups.

The working assumption was that each of the seven countries and four stakeholder groups were of equal importance. This gave the following sample structure:

Table A1: Initial sample structure for qualitative interviews by country by sector

	Total per country	State education	Private face-to-face	Digital	Employer
France	8	2	2	2	2
Greece	8	2	2	2	2
Italy	8	2	2	2	2
Poland	8	2	2	2	2
Portugal	8	2	2	2	2
Romania	8	2	2	2	2
Spain	8	2	2	2	2
Total	**56**	**14**	**14**	**14**	**14**

In-depth interviews

The in-depth interviews followed a guided discussion format. Four separate Discussion Guides (one for each stakeholder group) were written based on the findings from the immersion interviews, desk research, the literature review and the online survey. Drafts were approved by the British Council Project Team. The Discussion Guides were designed to take between 45 and 60 minutes. Interviews were carried out by telephone and recorded (with the participants' permission).

For pragmatic reasons, respondents with good proficiency in English were targeted. This was to avoid having to translate the Discussion Guides and use translators for interviews and analysis.

However, interviews were carried out by the research team in a few cases in Romanian and Spanish, where respondents preferred to do the interview in their mother tongue.

[162] http://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_386_en.pdf

Recruitment to the qualitative research study

Senior British Council staff in each of the countries were asked to identify named contacts in each of the four stakeholder groups. These individuals were contacted by British Council staff explaining the research, inviting potential interviewees to take part, and introducing them to Trajectory (the independent researchers). Those who indicated a willingness to participate were contacted by Trajectory.

Trajectory identified suitable interviewees where there were gaps in the stakeholder groups or for the digital sector. Where there were fewer recommendations, possible interviewees were identified by the researchers from desk research.

During the desk research, we added another stakeholder group – these were general English language experts who had a pan-European perspective. It also became apparent that digital experts were rarely country-based (digital products tend to be available more widely), and that the English language teaching market was very large in Spain.

This resulted in the sample structure shown in Table A2.

Timing of fieldwork

All potential interviewees were emailed by Trajectory researchers explaining the background to the research and inviting participants to take part. The first emails were sent in the week beginning 20 November 2017. Reminder emails were sent the weeks beginning 4 and 18 December.

Interviews took place between 1 December 2017 and 8 February 2018.

Qualitative fieldwork response

Response to the first round of invitations to take part was low. In part this is explained by seasonal factors – Christmas shutdown resulted in some participants (particularly in the teaching sector) being away for a three-week period, from mid-December to the second week of January.

Recruitment was difficult in some countries (Portugal and France), and in some sectors (in particular, employers and ministries of education). To counteract this, several steps were taken to improve the response rate.

British Council staff were asked to contact the potential participants they had recommended to encourage them to take part. In some cases, British Council staff also widened their list of recommended interviewees. To boost the number of employers, Trajectory used an approved third-party business-to-business market research recruitment agency and offered incentives for private sector interviewees. Desk research and a snowball method were also used to find private language schools in some countries.

Qualitative analysis

Recordings were listened to, notes of key findings made, and an analytical framework developed. Once we had developed the analytical framework, the research team analysed different themes and trends in more detail, applying a PESTLE analysis. The data was interrogated in detail again and direct material from the transcripts and the interviewers' observations, as well as data from the literature review was incorporated to the narrative.

Table A2: Final sample structure for qualitative interviews by country and sector

	State education	Private face-to-face	Employer	Experts	Total
France	2	2	2	-	6
Greece	2	2	2	-	6
Italy	2	2	2	-	6
Poland	2	2	2	-	6
Portugal	2	2	2	-	6
Romania	2	2	2	-	6
Spain	2	3	3	-	8
Digital	-	-	-	6	6
General expert	-	-	-	6	6
Total	**14**	**15**	**15**	**12**	**56**

Table A3: Final response for qualitative interviews by country and sector

	State education	Private face-to-face	Employer	Experts	Total
France	2	3	2	-	7
Greece	2	2	1	-	5
Italy	2	4	2	-	8
Poland	2	2	2	-	6
Portugal	3	2	2	-	7
Romania	3	2	4	-	9
Spain	4	3	3	-	10
Digital	-	-	-	6	6
General expert	-	-	-	4	4
Total	**18**	**18**	**16**	**10**	**62**

Data sources for quantitative modelling and in country profiles

Eurostat is a Directorate-General of the European Commission, and responsible for providing statistical information to the institutions of the European Union (EU) and promoting the harmonisation of statistical methods across its member states. Eurostat provides the most robust and comparable data when considering cross Europe-an issues, so we have used data extensively from this source. For some countries, more up to date data became available during the research period but, for consistency, reliability and comparability we have used the most up-to-date statistics published by Eurostat.

Where we identified data gaps, we used data from the OECD, United Nations and other reliable data sources.

Population

- **Date joined EU** https://europa.eu/european-union/about-eu/countries_en
- **Size of population 2017** http://ec.europa.eu/eurostat/statistics-explained/index.php/File:Demographic_balance,_2016_(thousands).png
- **Projected 2030 population** http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=proj_15npms&lang=en
- **Population growth rate 2015–30** http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=proj_15npms&lang=en
- **Fertility rate 2010 and 2015** http://ec.europa.eu/eurostat/statistics-explained/index.php/Fertility_statistics
- **Breakdown of population by age 2015** https://esa.un.org/unpd/wpp/Download/Standard/Population/

Economic data

- **GDP per capita 2016** http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tsdec100&plugin=1
- **Economic growth rate 2006 and 2015** http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=tec00115&plugin=1
- **Projected economic growth rate 2018** https://ec.europa.eu/info/business-economy-euro/economic-performance-and-forecasts/economic-forecasts/winter-2017-economic-forecast_en#economic-forecast-by-country
- **Unemployment rate 2017** http://ec.europa.eu/eurostat/documents/2995521/8491608/3-30112017-BP-EN.pdf/5206b358-348f-416b-877e-70a75d58f1ef
- **Youth unemployment rate 2017** https://www.statista.com/statistics/266228/youth-unemployment-rate-in-eu-countries/
- **Net migration 2015** http://ec.europa.eu/eurostat/data/database
- **Household dispensable income growth rate 2015** http://ec.europa.eu/eurostat/web/sector-accounts/data/annual-data

Education

- **Mandatory school starting age** https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/images/2/24/Compulsory_Education_in_Europe_2016_2017.pdf
- **Mandatory school leaving age** https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/images/2/24/Compulsory_Education_in_Europe_2016_2017.pdf
- **Number of students in tertiary education 2015** http://ec.europa.eu/eurostat/statistics-explained/index.php/Tertiary_education_statistics
- **Mean PISA Score for reading in 2015** https://www.oecd.org/pisa/pisa-2015-results-in-focus.pdf
- **Number of students in Erasmus Programme 2012** http://europa.eu/rapid/press-release_IP-13-657_en.htm
- **Percentage of adults in education and learning 2016** http://ec.europa.eu/eurostat/statistics-explained/index.php/Adult_learning_statistics
- **Cambridge English Key (KET) pass rate 2016** http://gradestatistics.cambridgeenglish.org/2016/ket.html

Foreign languages

- **English mandatory second language in schools** http://ec.europa.eu/eurostat/statistics-explained/index.php/Foreign_language_learning_statistics
- **Age at which pupils start learning first foreign language** http://eacea.ec.europa.eu/education/eurydice/documents/key_data_series/143EN.pdf
- **Age at which mandatory learning foreign language ends** https://webgate.ec.europa.eu/fpfis/mwikis/eurydice/images/0/06/KDL_2017_internet.pdf
- **Percentage of primary school pupils learning English 2015** http://ec.europa.eu/eurostat/statistics-explained/index.php/Foreign_language_learning_statistics
- **Percentage of secondary school pupils learning English 2015** http://ec.europa.eu/eurostat/statistics-explained/index.php/Foreign_language_learning_statistics
- **Percentage of the population that speaks English (conversation level)** http://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_386_en.pdf
- **Percentage with proficient knowledge of best known foreign language 2016** http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do
- **Percentage of lower secondary pupils learning two or more languages 2017** http://ec.europa.eu/eurostat/news/themes-in-the-spotlight/language-learning

Technology

- **Percentage of population with access to computers from home 2017** https://data.oecd.org/ict/access-to-computers-from-home.htm
- **Percentage of population with access to internet 2016** http://ec.europa.eu/eurostat/statistics-explained/index.php/Internet_access_and_use_statistics_-_households_and_individuals
- **Mobile phone penetration for internet use as percentage of internet users 2016** http://ec.europa.eu/eurostat/documents/2995521/7771139/9-20122016-BP-EN.pdf/f023d81a-dce2-4959-93e3-8cc7082b6edd
- **Use of social media as percentage of internet users in last three months 2016** http://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20170713-1

APPENDIX B: QUANTITATIVE MODELLING APPROACH

Accurately quantifying the future demand for English in Europe is complex because there is no baseline measure or standard method for measuring present demand. Demand for learning English is made up of five different sectors:

- school students formally studying English in mainstream education
- students studying for an English language degree in tertiary education
- adults studying English as an extracurricular activity (either formally in a college, Third Age university, language institute/school or informally through private classes, self-directed learning or digital means)
- adult employees studying English provided by their employer (in-house or paid-for external courses)
- individuals (children and adults) travelling overseas to study English.

When trying to measure the current demand for learning English there is only easily accessible, robust and reliable data for **one** of these groups. Eurostat collects data on the number of young people studying English in mainstream schools in each country in Europe.[163] To forecast the future demand from school students, we have a reliable and robust method where we use birth rate data from each country to predict if the numbers of children and young people studying English will change by 2025. This part of the model is very reliable and makes up a large part of the demand.

Eurostat collects data on the second group – the number of students studying at tertiary level by country and by broad subject area. There is data for the number of students who study 'languages', but there is no data at an individual language level. We can, however, use evidence from other sources to estimate the proportion of tertiary-level language students studying English. Because these number are small, we have taken these tertiary students out of the education model and decided to include them in the 'adults' model.

There is no comparative dataset for adults that gives reliable data on the number of adults studying English, their age breakdown or their proficiency level. The most comprehensive data was found in a 2012 special report carried out for the European Commission, called *Europeans and their Languages*.[164] This was a large-scale cross-European survey that gave data on the percentages of people who can speak English and their self-assessed proficiency levels by country. In the absence of any other data at this level, this source has been used to build the model along with insights from the qualitative study and desk research to adjust for the demographic data for each country. The downside of this data is that adults are treated as being aged 15 and above, rather than 18 and above (the typical school leaving age in Europe).

[163] http://ec.europa.eu/eurostat/statistics-explained/index.php/Foreign_language_learning_statistics

[164] *Op cit.* Directorate-General for Communication (2012).

For example, the evidence is that younger people have higher levels of proficiency in English than older people. As the younger population gets older, the number of middle-aged and older people who are proficient will increase. The logic is that the demand for English from these groups will fall (because they have learned English throughout their school careers, unlike older generations). But the qualitative insight is that in many countries, although overall proficiency levels have gone up, school leavers' proficiency in English still is not good enough for the working environment, and the number of sectors and roles where English is needed is growing. This means that there will be an increased demand from adults, although their levels of proficiency are higher than previous generations.

There is a 'push and pull' effect – demand may go down if the population is getting smaller (for example, in Portugal and Greece, because there will be fewer young people to learn English), but the need in the adult population in Greece and Portugal for better English for work, study or travel may increase demand and counteract the population decline.

To get an in-depth understanding of what was anticipated to happen in each of the countries by 2025, forecasts were created for the years 2015 to 2025. The key drivers of the forecasting models are demographics (i.e. the change in population by country and by age group). Two models were created, each forecasting something slightly different. The forecast for people in education organisations, up to the age of 18, is actually a forecast of the numbers learning (but as discussed, this does not consider the quality of that teaching).

The forecast for adults is not the number of people learning but the actual number of people who are 'in the market' for learning. What we are in fact forecasting is the proportion of people who are likely to be proficient in English, and on the assumption that these people are unlikely (in most circumstances) to want to learn English. Knowing this, and knowing the number of people in the adult age groups, then we can make a forecast of the 'potential market'. This may not be directly related to the actual demand for English by adults.

Number of students learning English in mainstream education

This model is primarily driven by demographics, but also school enrolment numbers and the proportion of children being taught English. Data suggests that a large proportion of students will be learning English (for most countries and education stages, this is over 90 per cent).

This does not consider the **quality** of English teaching, nor the proficiency gained by students. This is simply the numbers of school students being taught English.

Although it varies from country to country, the key dynamic operating is the fall in the number of people in the school age population (generally six to 18).

Overall for the seven countries, the population in these age groups over the ten-year forecast period falls by 3.6 per cent. This ranges from an increase of 0.6 per cent in France to a fall of 16 per cent in Portugal. This feeds directly through into the forecasts, with a 0.4 per cent increase over the ten years in the number of students learning English in French schools, to a fall of 11.7 per cent in Portugal. The change in number of students learning English is closely correlated to the demographic changes. In the seven countries, the numbers learning English falls by one million, from 31.8 million in 2015 to 30.8 million in 2025, with again a small increase in France and a reasonably large fall in Portugal.

While there is a fall in the overall number of students learning English, this differs across the three learning stages. There is a fall in primary and lower secondary and an increase in upper secondary (again primarily driven by demographic changes).

Table B1: Number of students learning English in State Education, by country, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
France	9.82	9.87	9.87	9.89	9.92	9.94	9.93	9.91	9.89	9.88	9.86	0.4%	0.0%
Greece	1.09	1.09	1.08	1.08	1.07	1.07	1.05	1.03	1.02	1.00	0.98	-9.6%	-1.0%
Italy	7.20	7.27	7.24	7.21	7.19	7.16	7.10	7.05	6.99	6.93	6.87	-4.6%	-0.5%
Poland	4.47	4.57	4.48	4.47	4.46	4.45	4.43	4.41	4.39	4.37	4.35	-2.7%	-0.3%
Portugal	0.87	0.96	0.89	0.88	0.86	0.85	0.83	0.82	0.80	0.79	0.77	-11.7%	-1.2%
Romania	2.34	2.35	2.32	2.30	2.28	2.27	2.25	2.23	2.21	2.19	2.17	-7.5%	-0.8%
Spain	6.02	6.08	6.06	6.08	6.10	6.12	6.06	6.00	5.93	5.87	5.81	-3.5%	-0.4%
Total	**31.8**	**32.2**	**31.9**	**31.9**	**31.9**	**31.9**	**31.7**	**31.4**	**31.2**	**31.0**	**30.8**	**-3.2%**	**-0.3%**

Table B2: Number of students learning English in State Education, by education stage, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
Primary	13.31	13.39	13.17	13.06	12.96	12.86	12.70	12.54	12.38	12.22	12.06	-9.4%	-1.0%
Lower secondary	9.23	9.33	9.39	9.45	9.51	9.58	9.47	9.36	9.25	9.14	9.03	-2.2%	-0.2%
Upper secondary	9.29	9.47	9.38	9.39	9.41	9.42	9.48	9.54	9.61	9.67	9.74	4.8%	0.5%
Total	**31.83**	**32.18**	**31.93**	**31.91**	**31.88**	**31.86**	**31.65**	**31.44**	**31.24**	**31.03**	**30.82**	**-3.2%**	**-0.3%**

Number of adults who may want to learn English (the potential market)

The age group covered by this forecasting model is people over the age of 15. Using data from the EU report *Europeans and their Languages* we can look at the proportion of non-English nationals aged 15–34, 35–54 and 55+, in each of the seven countries, who claim to speak English 'well' or 'very well'.

Our working assumption was that these people will generally not be in the market of those who want to learn English because the qualitative research indicated that the greatest demand for learning English came from younger people, and that the proficiency levels for English are improving because of various initiatives. Hence the assumption was that, as younger people reach a higher level of proficiency during their education, the demand for learning English as an adult will fall.

The data relates to 2012, which was used as the base year. By applying these proportions to the populations by age group in each country in 2012, we can calculate the number of people proficient in English and hence the number not proficient, who will potentially want to learn English. We then forecast how the proportion of people proficient in English will change, by age group, over time.

The proportions are subject to two influences.

1. **An age effect.** Numerically this is the more important factor. Proficiency is much higher in the under 55 age groups (around 30 per cent in the 15–34 year group, 20 per cent in the 45–54 year age group and under 10 per cent in the 55+ age group). Over the 13 years covered by the forecast (2013–25) a significant proportion of people in each age group will move into an older age group, and this will naturally (simply because of people getting older) improve proficiency in the older age groups.

2. **A cohort effect.** In addition to the age affect above, there will also be a cohort effect, in that people of a given age are likely to become more proficient. Although there will be some impact in the youngest age group (15–34), given the high proportion of people who have been learning English at school for quite a few years (and the quality of English teaching has been improving), the effect is likely to be more pronounced in the older age groups (34+) for a variety of reasons. For example, from the qualitative research we found that English is indispensable in some economies or sectors, and adults continue to learn or top up their English when moving into a new job, looking for a promotion, needing a new niche of English, etc. Furthermore, there is some evidence that older people with children and grandchildren living outside their home country want to learn English, and that retirees with more leisure time are studying English at Third Age universities for travel or interest purposes.

These 'proficiency percentages' are applied to the overall population by year, by age group, for each of the seven countries. From this we calculate the numbers both proficient in English and by subtraction the numbers not proficient, who potentially will want to learn English.

Because of population change, along with the age and cohort effects, the size of the 'potential' market will fall quite significantly between 2015 and 2025, from 172.5 million to 157.2 million (a fall of 8.8 per cent).

All seven countries see a fall in the potential adult market. The smallest fall being in Italy (-5.8 per cent) and the largest fall in Romania (-16 per cent).
The difference by country is a combination of the differences in population change, differences in current proficiency by age group, and the differences in the likely changes in proficiency from current levels.

There are very marked differences by age group.

Younger age group: there are very significant falls in the 'potential market' for the two younger age groups (15–34 and 35–54). This is a result of both population decreases for these age groups and the age effect of 'proficient' younger people moving into these older age groups.

The oldest age group: We forecast a small increase in numbers potentially wanting to learn English – a combination of fewer proficient people moving into the age group, more people (with an ageing population) and a reasonably large cohort effect, as older people have an increasing desire to learn English.

Table B3: Market potential: Number of people who might want to learn English, by country, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
France	40.0	40.0	40.0	40.0	39.9	39.9	39.8	39.7	39.6	39.5	39.4	-1.7%	-0.2%
Greece	6.6	6.5	6.5	6.4	6.4	6.3	6.2	6.2	6.1	6.0	6.0	-9.3%	-1.0%
Italy	44.7	44.5	44.4	44.2	44.1	44.0	43.8	43.6	43.4	43.2	43.1	-3.6%	-0.4%
Poland	26.5	26.4	26.2	26.1	25.9	25.8	25.6	25.4	25.2	25.0	24.8	-6.3%	-0.7%
Portugal	7.7	7.7	7.7	7.6	7.6	7.5	7.5	7.4	7.4	7.3	7.3	-5.8%	-0.6%
Romania	14.1	13.9	13.8	13.7	13.5	13.4	13.2	13.1	12.9	12.8	12.6	-10.2%	-1.1%
Spain	34.1	34.1	34.1	34.0	33.9	33.9	33.8	33.7	33.6	33.5	33.3	-2.3%	-0.2%
Total	**173.7**	**173.2**	**172.6**	**172.0**	**171.4**	**170.7**	**169.9**	**169.2**	**168.3**	**167.4**	**166.5**	**-4.2%**	**-0.4%**

Table B4: Market Potential: Number of people who might want to learn English, by age group, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
15-34	41.3	40.6	39.9	39.2	38.6	37.9	37.5	37.1	36.8	36.4	36.0	-12.8%	-1.4%
35-54	58.7	58.1	57.6	57.0	56.4	55.8	54.9	54.0	53.1	52.2	51.2	-12.7%	-1.4%
55+	73.7	74.4	75.1	75.8	76.4	77.0	77.5	78.0	78.5	78.9	79.3	7.5%	0.7%
Total	**173.7**	**173.2**	**172.6**	**172.0**	**171.4**	**170.7**	**169.9**	**169.2**	**168.3**	**167.4**	**166.5**	**-4.2%**	**-0.4%**

APPENDIX C: FULL QUANTITATIVE MODELLING RESULTS

Table C1: Number of students learning English in State Education, by country, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
France	9.82	9.87	9.87	9.89	9.92	9.94	9.93	9.91	9.89	9.88	9.86	0.4%	0.0%
Greece	1.09	1.09	1.08	1.08	1.07	1.07	1.05	1.03	1.02	1.00	0.98	-9.6%	-1.0%
Italy	7.20	7.27	7.24	7.21	7.19	7.16	7.10	7.05	6.99	6.93	6.87	-4.6%	-0.5%
Poland	4.47	4.57	4.48	4.47	4.46	4.45	4.43	4.41	4.39	4.37	4.35	-2.7%	-0.3%
Portugal	0.87	0.96	0.89	0.88	0.86	0.85	0.83	0.82	0.80	0.79	0.77	-11.7%	-1.2%
Romania	2.34	2.35	2.32	2.30	2.28	2.27	2.25	2.23	2.21	2.19	2.17	-7.5%	-0.8%
Spain	6.02	6.08	6.06	6.08	6.10	6.12	6.06	6.00	5.93	5.87	5.81	-3.5%	-0.4%
Total	**31.8**	**32.2**	**31.9**	**31.9**	**31.9**	**31.9**	**31.7**	**31.4**	**31.2**	**31.0**	**30.8**	**-3.2%**	**-0.3%**

Table C2: Number of students learning English in State Education, by country, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
Primary	13.31	13.39	13.17	13.06	12.96	12.86	12.70	12.54	12.38	12.22	12.06	-9.4%	-1.0%
Lower secondary	9.23	9.33	9.39	9.45	9.51	9.58	9.47	9.36	9.25	9.14	9.03	-2.2%	-0.2%
Upper secondary	9.29	9.47	9.38	9.39	9.41	9.42	9.48	9.54	9.61	9.67	9.74	4.8%	0.5%
Total	**31.83**	**32.18**	**31.93**	**31.91**	**31.88**	**31.86**	**31.65**	**31.44**	**31.24**	**31.03**	**30.82**	**-3.2%**	**-0.3%**

Table C3: Number of enrolled students (thousands)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Primary												
France	4,189	4,211	4,201	4,191	4,181	4,171	4,161	4,145	4,129	4,112	4,096	4,080
Greece	629	632	622	612	602	592	582	567	552	538	523	509
Italy		2,856	2,821	2,786	2,751	2,716	2,681	2,649	2,617	2,586	2,554	2,522
Poland	2,153	2,172	2,168	2,164	2,160	2,156	2,152	2,115	2,079	2,042	2,006	1,969
Portugal		657	644	632	619	607	594	581	567	553	539	526
Romania		947	937	927	916	906	896	886	875	865	855	845
Spain		3,010	2,978	2,946	2,913	2,881	2,848	2,794	2,740	2,686	2,632	2,578
Lower Secondary												
France	3,349	3,371	3,385	3,399	3,413	3,427	3,442	3,432	3,423	3,413	3,404	3,395
Greece	315	312	316	319	323	326	330	321	313	305	296	288
Italy		1,773	1,775	1,776	1,778	1,780	1,782	1,751	1,721	1,690	1,660	1,630
Poland	1,150	1,119	1,146	1,172	1,198	1,224	1,251	1,238	1,225	1,212	1,199	1,186
Portugal		385	379	374	368	362	357	350	342	335	328	321
Romania		785	785	785	785	785	785	772	760	747	735	722
Spain		1,625	1,650	1,675	1,701	1,726	1,752	1,721	1,690	1,659	1,629	1,598
Upper Secondary												
France	2,598	2,607	2,626	2,646	2,666	2,686	2,706	2,714	2,723	2,732	2,741	2,750
Greece	353	349	348	347	346	345	345	348	352	356	360	364
Italy		2,833	2,841	2,848	2,855	2,863	2,870	2,874	2,877	2,881	2,884	2,888
Poland	1,492	1,423	1,390	1,356	1,322	1,289	1,255	1,285	1,314	1,344	1,373	1,403
Portugal		394	390	387	384	381	378	374	369	365	360	356
Romania		778	770	762	754	747	739	740	740	741	742	742
Spain		1,688	1,722	1,755	1,788	1,821	1,854	1,882	1,911	1,939	1,967	1,995
Totals												
France		10,188	10,212	10,236	10,260	10,284	10,309	10,292	10,275	10,258	10,241	10,224
Greece		1,293	1,285	1,278	1,271	1,263	1,256	1,237	1,218	1,199	1,179	1,160
Italy		7,462	7,436	7,411	7,385	7,359	7,333	7,274	7,216	7,157	7,098	7,039
Poland		4,714	4,703	4,692	4,680	4,669	4,658	4,638	4,618	4,598	4,578	4,558
Portugal		1,435	1,414	1,393	1,372	1,350	1,329	1,304	1,278	1,253	1,227	1,202
Romania		2,510	2,492	2,474	2,456	2,438	2,419	2,397	2,375	2,353	2,331	2,309
Spain		6,324	6,350	6,376	6,402	6,428	6,454	6,397	6,341	6,284	6,228	6,171
All		33,927	33,893	33,859	33,825	33,791	33,758	33,539	33,320	33,101	32,882	32,664
Totals												
Primary		14,485	14,371	14,257	14,143	14,029	13,915	13,737	13,560	13,382	13,205	13,028
Lower secondary		9,370	9,435	9,501	9,566	9,631	9,697	9,585	9,474	9,362	9,251	9,139
Upper secondary		10,072	10,087	10,101	10,116	10,131	10,146	10,217	10,287	10,357	10,427	10,497
All		33,927	33,893	33,859	33,825	33,791	33,758	33,539	33,320	33,101	32,882	32,664

Table C4: Total population for ages covered by each educational group (thousands)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
Primary (generally 6–10)																		
France	4,242	4,265	4,289	4,312	4,335	4,359	4,348	4,338	4,328	4,318	4,307	4,290	4,273	4,257	4,240	4,223		
Greece	613	616	619	622	625	628	618	608	598	588	578	564	549	535	520	506		
Italy	3,067	3,071	3,076	3,080	3,085	3,089	3,052	3,014	2,976	2,938	2,900	2,866	2,831	2,797	2,762	2,727		
Poland	2,044	2,063	2,082	2,101	2,120	2,139	2,135	2,131	2,127	2,123	2,119	2,083	2,047	2,011	1,975	1,940		
Portugal	596	588	579	571	562	554	543	533	522	512	501	490	478	466	455	443		
Romania	964	960	956	951	947	943	932	922	912	902	891	881	871	861	851	841		
Spain	2,666	2,709	2,752	2,796	2,839	2,882	2,851	2,820	2,789	2,758	2,727	2,675	2,623	2,571	2,520	2,468		
Lower Secondary (generally 11–14)																		
France	3,392	3,415	3,437	3,460	3,483	3,505	3,520	3,535	3,550	3,565	3,579	3,570	3,560	3,550	3,540	3,530		
Greece	342	340	337	335	332	330	333	337	341	344	348	339	330	321	313	304		
Italy	1,942	1,946	1,950	1,955	1,959	1,963	1,965	1,967	1,969	1,971	1,972	1,939	1,905	1,872	1,838	1,804		
Poland	1,422	1,388	1,354	1,321	1,287	1,253	1,283	1,312	1,341	1,371	1,400	1,386	1,371	1,357	1,342	1,328		
Portugal	396	391	386	381	377	372	366	361	355	350	345	338	331	324	317	310		
Romania	776	767	758	749	740	731	731	731	731	731	731	719	708	696	684	673		
Spain	1,466	1,490	1,513	1,537	1,560	1,584	1,608	1,633	1,658	1,682	1,707	1,677	1,647	1,617	1,587	1,558		
Upper Secondary (generally 15–18)																		
France	2,619	2,627	2,635	2,644	2,652	2,661	2,681	2,701	2,721	2,741	2,762	2,771	2,780	2,789	2,798	2,807		
Greece	415	410	405	401	396	391	390	389	388	387	386	391	395	399	404	408		
Italy	2,880	2,862	2,844	2,825	2,807	2,788	2,796	2,803	2,810	2,818	2,825	2,828	2,832	2,835	2,839	2,842		
Poland	1,758	1,690	1,622	1,553	1,485	1,417	1,383	1,350	1,316	1,283	1,249	1,279	1,308	1,337	1,367	1,396		
Portugal	401	398	394	391	388	384	381	378	375	372	369	365	360	356	352	347		
Romania	838	823	807	792	777	761	754	746	738	731	723	724	725	725	726	726		
Spain	1,762	1,745	1,728	1,711	1,694	1,677	1,710	1,743	1,776	1,809	1,842	1,870	1,898	1,926	1,954	1,981		
Number of people of student age																		
France	10,253	10,307	10,362	10,416	10,470	10,525	10,550	10,574	10,599	10,624	10,648	10,631	10,613	10,595	10,578	10,560	0.3%	0.0%
Greece	1,370	1,366	1,362	1,357	1,353	1,349	1,341	1,334	1,327	1,320	1,313	1,294	1,274	1,255	1,236	1,217	-9.7%	-1.0%
Italy	7,890	7,880	7,870	7,860	7,851	7,841	7,812	7,783	7,755	7,726	7,698	7,633	7,568	7,503	7,439	7,374	-6.0%	-0.6%
Poland	5,224	5,141	5,058	4,975	4,892	4,809	4,801	4,793	4,785	4,777	4,769	4,748	4,727	4,706	4,685	4,664	-3.0%	-0.3%
Portugal	1,393	1,377	1,360	1,343	1,327	1,310	1,291	1,272	1,253	1,234	1,215	1,192	1,169	1,146	1,123	1,100	-16.0%	-1.7%
Romania	2,579	2,550	2,521	2,492	2,464	2,435	2,417	2,399	2,381	2,363	2,345	2,324	2,303	2,282	2,261	2,240	-8.0%	-0.8%
Spain	5,894	5,944	5,994	6,043	6,093	6,142	6,169	6,196	6,222	6,249	6,275	6,222	6,168	6,114	6,061	6,007	-2.2%	-0.2%
All	34,603	34,564	34,526	34,487	34,449	34,411	34,381	34,351	34,322	34,292	34,263	34,042	33,822	33,602	33,382	33,162	-3.6%	-0.4%

Assume ages for groups are: Primary 6–10, lower secondary 11–14,
Upper secondary 15–18 (varied a little depending on data on school ages)
Source of population data: UN Population Projections dataset

Table C5: Population by age group (thousands)

Country	0–4	5–9	10–14	15–19	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60–64	65–69	70–74	75–79	75–79	80–84	85–89	80–84	85–89
Population by age group (2010)																					
France	3,940	3,886	3,777	3,741	3,926	3,999	3,888	4,340	4,382	4,378	4,156	4,062	3,953	2,571	2,408	2,250	1,748	1,203	285	120	15
Greece	585	553	570	593	653	814	890	887	894	810	784	672	641	500	550	497	334	155	50	12	2
Italy	2,801	2,793	2,775	2,880	3,013	3,309	3,924	4,658	4 857	4 729	4,144	3,804	3,799	3,135	3 095	2,520	1,891	1,140	338	113	12
Poland	2,007	1,793	2,031	2,512	2,863	3,252	3,062	2,684	2 361	2 502	3,018	2,821	2,253	1,381	1,369	1,148	782	374	84	23	2
Portugal	495	533	565	573	599	686	792	836	773	776	719	676	637	547	501	437	288	153	51	12	1
Romania	1,063	1,053	1,109	1,197	1,489	1,324	1,598	1,572	1 611	1 136	1,454	1,467	1,161	850	943	717	455	194	37	10	1
Spain	2,467	2,294	2,076	2,203	2,504	3,209	4,066	4,118	3 834	3 632	3,216	2,667	2,454	2,118	1,802	1,787	1,297	722	253	63	7
Population by age group (2015)																					
France	3,874	3,978	3,922	3,801	3,713	3,907	4,046	3,945	4,365	4,369	4,330	4,070	3,930	3,777	2,407	2,168	1,873	1,238	632	94	20
Greece	504	579	549	559	566	620	785	868	869	877	793	763	647	608	463	483	388	208	71	14	2
Italy	2,554	2 810	2,804	2,788	2,909	3,053	3,345	3,947	4,663	4,843	4,691	4,083	3,708	3,643	2,931	2,758	2,035	1,266	554	101	17
Poland	1,903	2,003	1,790	2,024	2,493	2,840	3,228	3,037	2,654	2,323	2,439	2,900	2,659	2,070	1,227	1,149	861	479	163	22	3
Portugal	442	493	531	549	543	570	664	775	821	758	759	699	653	606	506	439	343	182	69	14	2
Romania	971	1,049	1,044	1,088	1,148	1,427	1,270	1,555	1,534	1,569	1,094	1,382	1,367	1,055	740	758	496	247	74	8	1
Spain	2,169	2,457	2,290	2,096	2,239	2,475	3,071	3,895	3,976	3,723	3,538	3,126	2,584	2,356	1,986	1,612	1,462	889	364	79	10
Population by age group (2020)																					
France	3,801	3,889	3,986	3,945	3,856	3,780	3,961	4,079	3,955	4,347	4,317	4,239	3,948	3,772	3,560	2,189	1,832	1,358	673	215	18
Greece	440	505	580	552	565	574	627	788	868	866	869	780	743	620	567	407	379	250	98	21	2
Italy	2,425	2,569	2,818	2,825	2,838	2,970	3,103	3,377	3,960	4,655	4,811	4,629	3,991	3,573	3,427	2,638	2,269	1,410	650	177	18
Poland	1,716	1,899	2,000	1,785	2,011	2,476	2,822	3,205	3,007	2,615	2,269	2,351	2,746	2,459	1,854	1,041	878	542	217	45	3
Portugal	387	442	492	527	542	536	564	658	768	812	747	744	680	625	565	448	349	223	86	20	2
Romania	925	963	1 044	1 033	1 062	1 116	1 397	1 246	1 529	1 502	1 522	1 043	1 295	1 251	927	601	536	277	97	17	1
Spain	1,983	2,178	2,462	2,302	2,125	2,274	2,503	3,087	3,896	3,960	3,688	3,479	3,047	2,488	2,224	1,800	1,344	1,030	461	116	13
Population by age group (2025)																					
France	3,778	3,817	3,898	4,010	4,000	3,924	3,835	3,995	4,089	3,942	4,299	4,232	4,121	3,802	3,574	3,265	1,872	1,354	759	238	38
Greece	404	442	506	583	559	574	581	631	789	865	858	856	761	715	582	504	325	251	123	31	4
Italy	2,358	2,443	2,578	2,842	2,882	2,909	3,029	3,142	3,397	3,961	4,630	4,755	4,536	3 859	3 381	3,114	2,205	1,610	747	216	30
Poland	1,542	1,713	1,897	1,995	1,773	1,996	2,460	2,802	3,176	2,966	2,559	2,194	2 236	2,555	2,220	1,590	808	566	254	63	7
Portugal	361	388	442	496	534	548	541	566	657	763	803	734	726	655	589	508	364	234	110	26	3
Romania	882	921	961	1,038	1,019	1,045	1,100	1,382	1,230	1,503	1,462	1,460	982	1,192	1,108	763	432	308	113	24	2
Spain	1,826	1,993	2,183	2,477	2 338	2,170	2 311	2 527	3,096	3,885	3,927	3,633	3,398	2,944	2,360	2,033	1,520	966	550	151	20

Table C6: Proportion of students learning English in each eduational stage (%)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Primary												
France	92.7%	93.2%	93.6%	93.2%	93.2%	93.2%	93.2%	93.2%	93.2%	93.2%	93.2%	93.2%
Greece	80.7%	79.1%	79.9%	79.9%	79.9%	79.9%	79.9%	79.9%	79.9%	79.9%	79.9%	79.9%
Italy	99.0%	98.3%	98.7%	98.7%	98.7%	98.7%	98.7%	98.7%	98.7%	98.7%	98.7%	98.7%
Poland	94.8%	95.6%	96.2%	95.5%	95.5%	95.5%	95.5%	95.5%	95.5%	95.5%	95.5%	95.5%
Portugal	35.9%	35.0%	50.6%	40.5%	40.5%	40.5%	40.5%	40.5%	40.5%	40.5%	40.5%	40.5%
Romania	69.3%	82.7%	84.9%	83.8%	83.8%	83.8%	83.8%	83.8%	83.8%	83.8%	83.8%	83.8%
Spain	99.1%	99.1%	99.6%	99.3%	99.3%	99.3%	99.3%	99.3%	99.3%	99.3%	99.3%	99.3%
Lower Secondary												
France	98.6%	98.8%	98.9%	98.8%	98.8%	98.8%	98.8%	98.8%	98.8%	98.8%	98.8%	98.8%
Greece	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%	98.1%
Italy	100.0%	98.1%	99.1%	99.1%	99.1%	99.1%	99.1%	99.1%	99.1%	99.1%	99.1%	99.1%
Poland	97.7%	97.7%	98.0%	97.8%	97.8%	97.8%	97.8%	97.8%	97.8%	97.8%	97.8%	97.8%
Portugal	95.4%	93.9%	94.9%	94.7%	94.7%	94.7%	94.7%	94.7%	94.7%	94.7%	94.7%	94.7%
Romania	99.4%	99.5%	99.7%	99.5%	99.5%	99.5%	99.5%	99.5%	99.5%	99.5%	99.5%	99.5%
Spain	100.0%	99.7%	100.0%	99.9%	99.9%	99.9%	99.9%	99.9%	99.9%	99.9%	99.9%	99.9%
Upper Secondary												
France	98.4%	98.5%	98.6%	98.5%	98.5%	98.5%	98.5%	98.5%	98.5%	98.5%	98.5%	98.5%
Greece	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%	81.3%
Italy	98.0%	93.8%	95.9%	95.9%	95.9%	95.9%	95.9%	95.9%	95.9%	95.9%	95.9%	95.9%
Poland	90.7%	91.6%	97.8%	93.4%	93.4%	93.4%	93.4%	93.4%	93.4%	93.4%	93.4%	93.4%
Portugal	72.4%	71.9%	71.4%	71.9%	71.9%	71.9%	71.9%	71.9%	71.9%	71.9%	71.9%	71.9%
Romania	99.2%	99.9%	99.8%	99.6%	99.6%	99.6%	99.6%	99.6%	99.6%	99.6%	99.6%	99.6%
Spain	80.0%	84.2%	85.0%	83.1%	83.1%	83.1%	83.1%	83.1%	83.1%	83.1%	83.1%	83.1%

Table C7: Number of students learning English (thousands)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Primary												
France		3,925	3,932	3,905	3,896	3,886	3,877	3,862	3,847	3,831	3,816	3,801
Greece		500	497	489	481	473	465	453	441	430	418	406
Italy		2,808	2,783	2,749	2,714	2,680	2,645	2,614	2,582	2,551	2,519	2,488
Poland		2,076	2,086	2,067	2,063	2,060	2,056	2,021	1,986	1,951	1,916	1,881
Portugal		230	326	256	251	246	241	235	230	224	218	213
Romania		783	795	776	768	759	751	742	734	725	716	708
Spain		2,983	2,966	2,924	2,892	2,860	2,827	2,774	2,720	2,666	2,613	2,559
Lower Secondary												
France		3,330	3,348	3,357	3,371	3,385	3,399	3,390	3,381	3,371	3,362	3,353
Greece		306	310	313	317	320	323	315	307	299	291	282
Italy		1,739	1,758	1,759	1,761	1,763	1,765	1,735	1,704	1,674	1,644	1,614
Poland		1,094	1,123	1,146	1,172	1,197	1,223	1,210	1,198	1,185	1,173	1,160
Portugal		361	360	354	349	343	338	331	324	317	311	304
Romania		781	783	781	781	781	781	769	756	744	731	719
Spain		1,620	1,650	1,674	1,699	1,724	1,750	1,719	1,688	1,658	1,627	1,596
Upper Secondary												
France		2,568	2,590	2,606	2,626	2,645	2,665	2,674	2,682	2,691	2,700	2,709
Greece		284	283	282	281	281	280	283	286	289	293	296
Italy		2,658	2,724	2,731	2,738	2,745	2,752	2,756	2,759	2,763	2,766	2,769
Poland		1,304	1,359	1,266	1,235	1,203	1,172	1,199	1,227	1,254	1,282	1,310
Portugal		283	279	279	276	274	272	269	265	262	259	256
Romania		777	769	759	752	744	736	737	738	738	739	740
Spain		1,422	1,463	1,458	1,485	1,513	1,540	1,564	1,587	1,610	1,634	1,657
Totals												
France		9,822	9,870	9,868	9,893	9,917	9,941	9,925	9,910	9,894	9,878	9,862
Greece		1,090	1,089	1,084	1,079	1,074	1,068	1,052	1,035	1,018	1,001	985
Italy		7,204	7,265	7,239	7,214	7,188	7,162	7,104	7,046	6,988	6,929	6,871
Poland		4,474	4,567	4,479	4,470	4,460	4,451	4,431	4,411	4,391	4,371	4,351
Portugal		874	965	888	876	863	850	835	819	804	788	772
Romania		2,342	2,347	2,317	2,301	2,284	2,268	2,248	2,227	2,207	2,187	2,166
Spain		6,025	6,079	6,055	6,076	6,097	6,117	6,056	5,995	5,934	5,874	5,813
All		31,831	32,182	31,932	31,908	31,883	31,858	31,651	31,443	31,235	31,028	30,820
Totals												
Primary		13,305	13,385	13,166	13,064	12,963	12,861	12,700	12,539	12,378	12,217	12,056
Lower secondary		9,232	9,331	9,385	9,450	9,515	9,579	9,469	9,359	9,249	9,139	9,028
Upper secondary		9,294	9,466	9,381	9,393	9,406	9,418	9,481	9,545	9,608	9,672	9,736
All		31,831	32,182	31,932	31,907	31,884	31,858	31,650	31,443	31,235	31,028	30,820

Table C8: Percentage of people who speak English as a foreign language (well or very well)

	15-34	35-54	55+	All
France	31.9%	26.2%	12.6%	22.9%
Greece	48.6%	32.5%	13.6%	31.7%
Italy	18.7%	14.0%	6.8%	12.4%
Poland	31.9%	15.4%	5.7%	18.3%
Portugal	26.1%	12.5%	3.5%	13.6%
Romania	32.4%	13.1%	2.8%	16.8%
Spain	19.0%	17.2%	3.7%	11.3%

Table C9: Market potential: Number of people who might want to learn English, by country, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
France	40.0	40.0	40.0	40.0	39.9	39.9	39.8	39.7	39.6	39.5	39.4	-1.7%	-0.2%
Greece	6.6	6.5	6.5	6.4	6.4	6.3	6.2	6.2	6.1	6.0	6.0	-9.3%	-1.0%
Italy	44.7	44.5	44.4	44.2	44.1	44.0	43.8	43.6	43.4	43.2	43.1	-3.6%	-0.4%
Poland	26.5	26.4	26.2	26.1	25.9	25.8	25.6	25.4	25.2	25.0	24.8	-6.3%	-0.7%
Portugal	7.7	7.7	7.7	7.6	7.6	7.5	7.5	7.4	7.4	7.3	7.3	-5.8%	-0.6%
Romania	14.1	13.9	13.8	13.7	13.5	13.4	13.2	13.1	12.9	12.8	12.6	-10.2%	-1.1%
Spain	34.1	34.1	34.1	34.0	33.9	33.9	33.8	33.7	33.6	33.5	33.3	-2.3%	-0.2%
Total	**173.7**	**173.2**	**172.6**	**172.0**	**171.4**	**170.7**	**169.9**	**169.2**	**168.3**	**167.4**	**166.5**	**-4.2%**	**-0.4%**

Table C10: Market Potential: Proportion of adult population who might want to learn English, by country, 2015 - 2025 (%)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
France	76.0%	75.6%	75.1%	74.7%	74.2%	73.8%	73.3%	72.8%	72.2%	71.7%	71.1%
Greece	68.6%	68.1%	67.6%	67.0%	66.4%	65.8%	65.1%	64.4%	63.7%	63.0%	62.2%
Italy	87.0%	86.7%	86.5%	86.2%	85.9%	85.6%	85.3%	85.0%	84.7%	84.4%	84.0%
Poland	81.4%	81.1%	80.8%	80.5%	80.1%	79.7%	79.3%	78.8%	78.2%	77.7%	77.1%
Portugal	86.4%	86.1%	85.8%	85.5%	85.1%	84.7%	84.3%	83.8%	83.4%	82.9%	82.3%
Romania	83.7%	83.2%	82.7%	82.2%	81.7%	81.1%	80.6%	80.1%	79.5%	78.8%	78.1%
Spain	86.4%	86.2%	85.9%	85.7%	85.4%	85.0%	84.7%	84.2%	83.8%	83.3%	82.7%

Table C11: Market Potential: Number of people who might want to learn English, by age group, 2015–25 (millions)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	% change	% change (pa)
15–34	41.3	40.6	39.9	39.2	38.6	37.9	37.5	37.1	36.8	36.4	36.0	-12.8%	-1.4%
35–54	58.7	58.1	57.6	57.0	56.4	55.8	54.9	54.0	53.1	52.2	51.2	-12.7%	-1.4%
55+	73.7	74.4	75.1	75.8	76.4	77.0	77.5	78.0	78.5	78.9	79.3	7.5%	0.7%
Total	**173.7**	**173.2**	**172.6**	**172.0**	**171.4**	**170.7**	**169.9**	**169.2**	**168.3**	**167.4**	**166.5**	**-4.2%**	**-0.4%**

ACKNOWLEDGEMENTS

Our thanks and gratitude go to the British Council Project Team: Chris Brandwood, Director of English, EU Europe, Rod Woodford, Regional Business Development Manager, Nikant Ailawadi, Head of Market Insight, Liz Shepherd, Senior Researcher, and last but by no means least, Sarah Rolph, English Project Manager, whose practical help, support and insight was so useful in this project.

We would like to thank the following individuals for their input, insights, comments, reflections and time in helping with this project.

This project was carried out by Jane O'Brien, Georgiana Murariu, Paul Flatters, Chris Farmelo, Harry Baker and Michael Willmott of Trajectory. Thanks to Jim Murphy for translation services.

We would like to thank the following individuals for their input, insights, comments, reflections and time in helping with this project.

Dr Thomaï Alexiou, Department of Theoretical and Applied Linguistics, School of English, Aristotle University of Thessaloniki, Greece / Alison Bancroft, Kids&Us, Barcelona, Spain / Barbara Baranska, Polish Banks Association, Warsaw / Anne-Marie Barrault-Methy, Département de langues, University of Bordeaux, France / Lucja Biel, Associate Professor, Head of Corpus Research Center, Faculty of Applied Linguistics, University of Warsaw, Poland / Alexandra Bousnone, English trainer, Nantes, France / Raymond Breden, Director, Taxation Services, KPMG, Europe / Daniela Bruneau, English Language Schools Association (ELSA), France / Tony Buckby, British Council, Greece / Susana Caceres, Human Resources, Interparking, Hispania SA, Barcelona / Lucio Calleja, Head of Language Services, Government of Castilla-La Mancha, Spain / Ana Castro Dias, Manager, Secretarial and Management Support, Michael Page, Portugal / David Cervera Olivares, Director, Innovative Programmes, Council of Education and Research, Madrid, Spain / Vasia Chanioti, Human Resources Manager, EuroLife EBR Insurance, Greece / Romina Costa, British Council, Romania / Rafael Cubero Saiz, Human Resources Manager, Tecnatom, Spain / Mariana Cunha, British Council, Portugal / Trinidad de Haro, Bilingual Advisor, Department of Innovation, Grants and Help for Education Madrid, Spain / Diana Deleanu, University Lecturer and Law Partner, Romania / Professor Bessie Dendrinos, Professor of Sociology of Language and Foreign Language Education at the Department of Language and Linguistics, Faculty of English Language and Literature, School of Philosophy, National and Kapodistrian University of Athens, Greece / Fatima Dias, British Council, Portugal / Daniel Diez, Human Resources Business Partner, Elavon Merchant Services, Spain / Gail Ellis, Advisor, Young Learners and Quality, British Council, France / Professor Janet Enever, Language Teaching and Learning at Umeå University, Sweden / Andrea Fischer, Training Manager, AKKA Technologies, France / Donatella Fitzgerald, Teacher and Teacher Trainer, Pearson Italia / Enrico Gambardella, Human Resources Director, Aviva, Italy / Alberto Gaspar, President, Portuguese Association of English Teachers / Samantha Grainger, British Council, Singapore / Monica Green, Director and Co-owner, International House, Torres Vedras, Portugal Professor Ana Halbach, Department of Modern Languages, University of Alcalá, Madrid, Spain / Nuno Ignacio, Product Manager, Vodafone, Portugal / Eva Kaliskami, Head of English, IM Panagiotopoulos, Greece / Professor Dr Hanna Komorowska, Head, Dept of Applied Linguistics, University of Social Sciences and Humanities, Warsaw / Professor Dr Angelika Kubanek, Technische Universität Braunschweig, Germany / Palmina La Rosa, Director, International House, Catania, Italy / Gisella Langé, Inspector for Foreign Languages, Ministry of Education, Italy / Benjamin Levy, CEO, Gymglish, Paris, France / Mark Levy, Head of English Programmes, British Council, Madrid, Spain / Lucilla Lopriore, Associate Professor, Roma Tre University, Italy / Andy MacKay, British Council, Spain / Philip Malcolm, British Council, France / Justyna Martin MA, Director of Studies, Empik School Warsaw Centre (Junior), Poland / Adrian Massam, National Association of British Schools in Spain / Giacomo Moiso, Fluentify / Bernhard Niesner, CEO, Busuu, London, UK / Alkis Panagiotopoulos, Head of School, AI Panagiotopoulos, Pallini, Athens, Greece / Mark Percival, Business Writer, KPMG, Romania / Lorenzo Pirovano, Human Resources Manager, Rhea Vendors Group SpA, Italy / Cristiana Pontiroli, HR Manager, HDI Global, Italy / Dana Postolache, Petru Rareş National College, Suceava, Edumax Centre, Romania / Giuseppe Romagnoli, VICTORIA International House Ancona, Jesi, Italy / Professor Octavian Roske, University of Bucharest, Romania / Professor Barry O'Sullivan FAcSS, Head of Assessment, Research and Development, British Council, London, UK / Paul Sellers, British Council, Italy / Burr Settles, Staff Scientist and Software Engineer, Duolingo, USA / Mary-Anne Spekhorst, Training Manager, Penelope Agency, Paris, France / Zachary Sporn, Babbel, Berlin, Germany / Russell Stannard, Educational Technologist and Consultant, London, UK / Agata Stefan, British Romanian Chamber of Commerce / Bogdan Stefan, Simone Educational Center, Craiova, Romania / Dr Dimitris Tolias, Center for Applied Linguistics and Language Studies. Hellenic American Union, Greece / Daniel Xerri, President IATEFL (Malta), Centre for English Language Proficiency, University of Malta / Michal Zajac, Co-owner, Lublin Royal School of English, Lublin, Poland.

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