



Erasmus+

## ***PROLANT-CAP***

*“Learning, training and working for better perspectives and employability”*

### ***Intellectual Output 1: Needs Analysis Summary***



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## INTRODUCTION

The purpose of this project is to enhance professional development of foreign language teachers and trainers and create a common system in which continuous professional development of teachers in language schools will be defined. The project is primarily focused on foreign language teachers and in-company trainers from language schools and language schools associations. The language teachers and trainers in the private sector are separate from the system of professional development set up for teachers of formal state education prepared by regulators.

The aim of this project lies in the fact that the trainer is a key player in adult education and as such she/he needs not only to be an accomplished professional in the subject (English) but at the same time needs to be well-organized, focused, possess effective communication skills and constantly seek continuous professional career development. This project is collaborated internationally among 6 partners representing 3 language schools, 1 language school association, 1 vocational education training organization and 1 adult training organization.

The aim of the present study is to analyse the current situation about professional development of teachers and in-company trainers. As a first step, the study focused on desk research of existing literature about (1) the foreign teachers and trainers' educational possibilities in each country; (2) continuous professional development of trainers; (3) the legal background of language schools; (4) the key data of the automotive industry/tourism sector in the country.

Every participating organization carried out research targeting 3 groups - companies (tourism and automotive sectors), language schools and foreign language teachers and trainer to find out the current situation with language training in every project country.

# 1. AUTOMOTIVE INDUSTRY

## 1.1. Latvia needs analysis summary

### Overview of teacher education

Latvia has two sorts of higher education programmes: academic and professional. Such division in higher education allows the student to choose either research or professional career paths in the future. Teachers in Latvia are trained at 3 higher education institutions with two possible routes. The most common is a professional bachelor's degree program lasting 4 years, which provides a teaching qualification for a specific level of education (pre-school, primary, secondary) and, for secondary school teachers, a specific subject area. The second route requires two stages – a bachelor's degree (3 years) in Education Sciences, plus an additional two years of study in a second level professional programme of studies to qualify as a teacher at a specific level of education and/or subject area. After obtaining a bachelor's degree, students have the right to study on the Master's program or second level professional higher education program.

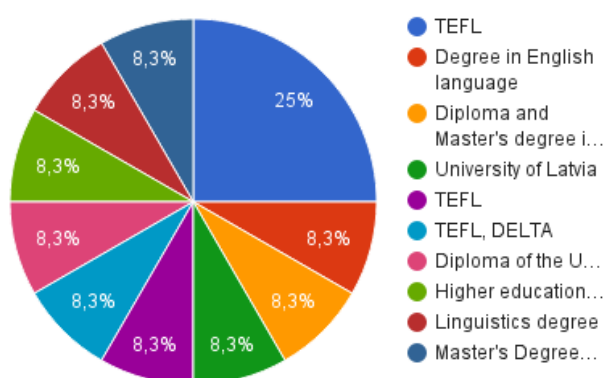
Continuous professional development is considered to be part of adult education, the term, which includes also all types of formal, non-formal and informal education includes further education and professional upgrading. It is provided to satisfy needs in the lifelong education process to support personal development and competitiveness in the labour market regardless of a person's age and previous education.

However, non-formal and informal education is not always able to satisfy the wants and needs of individuals, it is not always able to respond quickly enough to changes in technology and social skills, so people are increasingly frequently obtaining necessary knowledge and skills outside formal education by attending various different courses, seminars, conferences. Informal education is not identical with the non-formal education. It is a fundamental aspect of an individual's lifelong education process, whereby the individual acquires attitudes, values, skills and knowledge from the daily experience.

## Overview of trainers and teachers

To find out language school trainers and teachers' opinion about further career and professional development, as well as the need to develop a training programme for the automotive/tourism sectors, an online questionnaire was carried out. Questionnaires were sent electronically to at least 30 foreign language schools in Latvia and it consisted of 22 questions, of which 16 were closed questions and 6 were open. The 1st to 8th questions were about experience and skills, the 9th to 13th about current jobs, the 14th to 18th questions about career development and finally the 19th to 22nd about personal data. Respondent's ages ranged from 25 to 55 years, the planned survey sample was 15 respondents and achieved 16 respondents, and the average age was 25+. Summarizing the respondents' answers to the first question about teaching experience: the following data were the majority or 62.5% had teaching experience of more than 10 years and 25% had teaching experience of 6-10 years. Questioning respondents about language teaching, almost all answered that they teach English and Russian. It can be concluded that the most requested foreign languages that people learn in Latvia are English and Russian. Analyzing answers about foreign language qualifications, the majority had TEFL (Teaching English as Foreign language) and/or a Masters Degree in English Language Teaching or Linguistics.

**Which areas of expertise do you have?**



The next question was about teachers and trainers' teaching areas and the most popular answers were Individuals (children and adults- 93.3%), Business English (73.3%) and foreign language tests and exams (66.7%). In the questionnaire there was also a question about specialized English language programmes for specific purposes and half of the respondents (50%) answered that they teach English for specific purposes and the other half (50%) answered that they do not.. In the next question, respondents were asked to specify what areas they teach English for specific purposes for and the most popular answers were Business English (correspondence, e-mail, presentations, conferences etc.), English for Tourism r (hotels, restaurants and catering) and finally Legal English (accounting, financial and bank sector).

It can be concluded that the main, specific sectors in Latvia where employees need to know English for specific purposes are the Business, Finance, Hospitality, Tourism and Law sectors. In this questionnaire, it was important to find out what qualifications are necessary to become a teacher/trainer, and most respondents answered professional skills (87.5%), foreign language subject knowledge (81.3 %), personal qualities and experience (81.3%) and degree-education (75%). These answers show that it's important that teachers/trainers are professionally-oriented, flexible and have a focus on career development. In addition, it was important to find out if teachers/trainers would like to improve their professional career. Most of the respondents answered that they would like to participate in various types of career development activities, e.g: lectures, workshops; seminars; training courses and exchange programmes. These answers show that life-long learning is crucial to supplementing and improving knowledge.

#### The current situation of language schools

Mostly foreign language courses are organized into three semesters: spring and autumn, as well as the summer semester, which offer intensive training programmes. Language schools offer a wide range of different course types e.g: General English, Individual courses and English for Professionals. A lot of the language schools in Riga also offer Scandinavian languages- Swedish, Norwegian, Danish and Finnish.

Foreign language schools in Latvia should be licensed and these licenses are approved by the State Education Quality Service. The State Education Quality Service in Latvia is the licensing

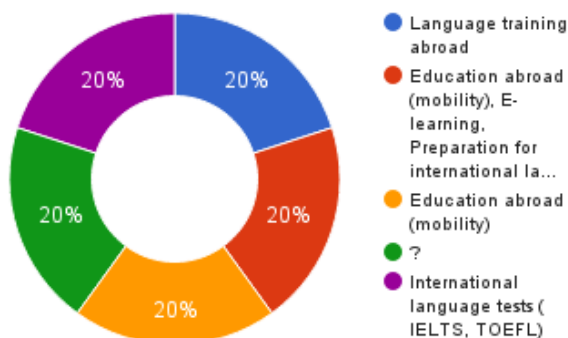


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body for programmes of general education, professional basic education, vocational education, professional secondary education, professional orientation education, professional excellence and professional further education.

The second target group in this report was language schools, in this case we surveyed private, and franchised language schools in Riga. Language school feedback was not large and the target was to gain answers from five language schools.. Most of the language schools have provided foreign language teaching for 6-10 years and most of them offer foreign language teaching for individuals (children, adults) and companies (large/corporate, small and medium sized enterprises). All language schools have a very wide choice of services and the majority of them offer General and Academic English teaching and foreign language courses for individuals and companies together with written and oral translation and foreign language tests and exams. Likewise, language schools offer basic services; they also have specific purposes language offers. As can be seen in this chart, language schools offer a wide range of specific purposes, which can be adapted to different customer needs.

**What other services do you offer?**



A large number of language schools in Latvia have different types of clients, for example not only individuals, but also companies and in this case it was vital to know what training programmes and courses language schools offered to companies. All language schools answered that they offer General, Business and Specialized language programmes (job and sector-specific courses). The aim of this questionnaire was also to find out if language schools offer teacher/trainer career development opportunities and most answered that they offer formal professional development courses, non-formal and continuing education opportunities,

seminars and conferences and Mobility (Erasmus+). As can be seen, language schools in Latvia offer different possibilities for its employees to develop professionally.

### The current situation of the automotive industry in Latvia

Speaking about current automotive industry in the Latvia, we could say that the automotive industry in our country, such as car industrial manufacturing, does not exist. In that context we should talk more about car associated industries such as auto dealers and service centres, companies that directly and indirectly manufacture various parts and component units for the import market such as BMW, VW, Opel, Audi and indirect supply for VOLVO and SCANIA trucks. In this case, we could also consider electrical and electromechanical manufacturing and Sub-Contracting companies, which specialize in the field of industrial automation and machine design, fleet management products (Intellectual Transportation Systems), vehicle alarms and immobilizers etc.

Despite the fact that in Latvia there is no industrial manufacturing of automobiles, there are five relevant parties that represent the automotive sector in Latvia. The questionnaire was filled out by five companies who have been working in the automotive sector for 6-10 years and only one company working in the automotive sector for more than 10 years. In this context, it can be said that that in Latvia large/corporate automotive sector companies do not exist but rather small or medium-sized companies with 10-50 employees do as well as large/corporate companies number with approx 100-350 employees. The aim of the questionnaire was also to find out about the employees' foreign language skills and whether companies trained their employees in sector-specific language courses. In our country most of the companies that are related to the automotive sector work particularly for Europe (Germany, France, Sweden, Austria, Belgium, Russian, and Belarus.). The questionnaire data show that the most needed and valued foreign languages in all the companies are English, and Russian, and this data shows that Latvia is focused on the Western and Eastern European car manufacturers' market. With regard to organizing language courses for employees, then four companies answered that they do not



organize any and only one company answered that they organize language courses for employees and the objective was to improve foreign language skills and for that purpose employees were sent on language courses at language schools.

## 1.2. Slovakia needs analysis summary

### Language teachers and trainers

In our survey among foreign language teachers and trainers there were 211 respondents, 62% of whom have been teaching for more than 10 years. Almost 28% of the teachers in this survey are freelance, 6% work varied hours and the majority of 59% work full-time. 73.4 % of the teachers addressed have other teaching qualifications than the ones stated in our survey. It is assumed that these are graduates of pedagogical faculties and faculties of arts providing teacher-training qualifications that fit the state school system. It is of interest to notice that 17.1% of teachers possess the TEFL qualification. Only 2% of teachers are holders of the CELTA certificate and just 1% of DELTA.

141 teachers focus on individuals and groups, 53 teachers on testing, 49 teachers on business, only 19 teachers focus on technical language and 69 teachers focus on “other”. Teachers can see the necessity for a balance regarding their qualifications and one teacher wanted “a longer discussion” for this.

The answer to the question “How do you improve your professional knowledge?” shows us that 169 teachers choose self-improvement, 121 teachers attend conferences and seminars, and 104 teachers choose attendance on structured courses directly linked to their career development. 103 teachers improve by other forms of informal training. In terms of the career path, 87.5% teachers find the current system inadequate and would like the opportunity to grow and develop. Only 13% of teachers would not like to progress in their career. Salary (73.5%) and further

training along with career path (66.7) are deduced to be the two major driving forces for teachers to maximize enjoyment of their work.

### Language schools

The number of private schools is growing, we can see a tendency for students of English to open up a school right after graduating.

The number of private language schools in Slovakia is growing due to the easy establishment of such schools and no requirement for a lot of investment and start-up capital. Also due to the lower costs of running their school they may need no other staff so they are able to offer lower prices for language services and thus downgrade the language market. However, in the case of a school run by a single teacher owner, there is no space for further education. It decreases the value of the methodologist and school manager. The private language school market is very competitive. Since Slovak society is price sensitive, the schools sometimes charge very low prices for lessons and courses per unit. As result, with such low prices and low pay for teachers and low profit for companies, there is no space for progression, teacher development and enhanced motivation.

The language schools can operate as:

1. state language schools offering state-leaving exams in foreign languages funded by the state
2. self-employed teachers operating as small language schools consisting either only of the owner/sole teacher or having another 1 or 2 contracted teachers
3. non-profit organizations providing language training

They can operate as agencies providing trainers and teachers to customers and operate as “schools” focusing on establishing the environment that provides teachers, trainers and other admin and management staff with further training and development

4. limited companies providing language training funded by individual clients

whether by operating as agencies providing trainers and teachers to customers or operating as “schools” focusing on establishing the environment that provides teachers, trainers and other admin and management staff with further training and development



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The private Association of language schools of Slovakia is a multi-organizational, non-governmental organization that aims to facilitate the continuing education of schools and teachers, enterprises and society, supporting development of different competencies, as well as personal and professional skills. AJS cooperates with governmental and non-governmental organizations in order to improve the segment of language teaching in the Slovak market. It is open to other language schools that meet the quality criteria and share the AJS vision.

In the analysis we compiled responses from 17 institutions from all over the country. Over 50% of the schools have been in the business for more than 10 years. More than 75% of the schools offer professional career growth options to their teachers and teacher trainers. The forms are mainly seminars and conferences, non-formal and continuous education, and professional development courses. This happens once a year for some and more than 3 times a year for others, but the frequency levels vary equally.

#### Automotive industry

From a sample of 20 respondents we achieved a percentage of 30 % (6/20). We have taken into consideration all the answers and, as we can see, our target is made up of differently sized companies working in the automotive industry for more than 6 years.

In two cases we have a big company with 11,500 and 3,500 employees but all of them rate linguistic ability highly. It is for this reason that we have had positive feedback to the question of which foreign languages are requested in this sector.

For our results indicate that managers and executive directors can manage themselves easily in a foreign language situation while employees are asked to have a basic knowledge. So, the general level of skills in foreign languages requested and the level of expertise achieved match.

Perhaps because of the recognition of the importance of foreign languages, we can see that our target group has invested in and continues to invest in training for employees to deliver both basic and specific competences. Our six automotive industries all succeeded in the final objective of their training courses (to develop competences thanks to the organization of

training for groups and individuals and to achieve the independent user level of a foreign language, to improve their knowledge and their language skills in English and German).

100% of respondents consider sector-specific language training necessary for a better job. Almost 67% of the respondents would be willing to cooperate with us in order to develop specialized language training modules for their sector. On the basis of this, despite the relatively low participation of respondents, we can find positive feedback in the automotive industry stakeholders' attitude.

We would also like to stress that Slovakia is at the moment the biggest producer of cars in the world (when calculating number of cars produced per person in the country). With the launch of the fourth car producer LANDROVER JAGUAR in 2017/18 we will become even stronger and thus the need to train skilled people for this industry becomes an urgent matter for schools and other training providers.

In general, there is a high demand for language training in Slovakia at the moment and the tendency is being strengthened by the fact that we are part of the European Union where speaking at least one world language is undoubtedly a must for us.

When it comes to the area of private language schools, many of the respondents have been in the business for more than 10 years, their main focus is still on general English much less than on industry specific education. If they do provide it, they mostly focus on the automotive industry as this is a major industry in Slovakia. With reference to the training of teachers in the private sector, most of the training on offer focus on communication, general methodology, attending seminars and conferences and the like.

It is vital that in order to improve the quality of language training in Slovakia (state and private schools), first language teacher-trainers need to be trained and the bridge between them (language teachers and foreign language teacher-trainers) must be established. A clear structure supporting the ongoing preparation and care for these language teacher-trainers is of urgent importance. The launch of the Learn & Lead Academy in July 2016, a joint initiative by the AJS members, is the alternative we offer.



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### 1.3. Italy needs analysis summary

In Italy, school teaching has never been regarded as a prestigious job; in particular, there has always been, on the part of the public, a tendency to disregard the role of foreign language teachers. There has traditionally been the commonly held perception that foreign languages could only be learnt abroad or in the many private language schools spread all over Italy but certainly not in the school system where Italian native speakers teach.

Nowadays, successful or innovative practices that have affected foreign language education policies in Italy have been closely connected to and influenced by a variety of factors such as curriculum reform, methodologies used, reach and use of technologies, types of agreed assessment procedures, research into foreign language education with its policy implications, forms of teacher recruitment and retention and the overall philosophy underlying teacher education at pre- and in-service level.

Foreign language teaching in Italy has always been characterized by continuous innovations introduced by the **Italian Ministry of Education** (*MIUR, Ministero dell'Istruzione, dell'Università e della Ricerca*) either at national level or through several local experimental projects.

The need to adjust the Italian school system to European standards in education and to the levels of foreign language competence as described by the *Council of Europe* (Common European Framework, 1996, 1998) has led to new financial investment in education and to some innovative projects focusing on the importance of foreign language learning, introduced in the Italian school system with new tools, resources and teaching methods as well as the possibility of studying a second European language at all school levels.

If the situation in learning is a bit complicated because of the different contexts, teaching is more complex. In Italy, the process of becoming a teacher is common to all disciplines but it varies according to the level of school in which the teacher will teach. Actually, the Italian school system anticipates different training requirements for foreign language teachers, according to the different school levels. Regarding the private sector, on the contrary, it really

varies by school, but in general teachers are expected to possess native speaker fluency or acquired competence in their target languages and formal qualifications to become a language teacher. For this reason, to bring clarity and valid competences to teachers who want to teach foreign languages, Euroform RFS decided to follow the strategy of assessing the Italian situation.

To obtain a general overview of trainers and teachers, as partners, our organization has administered **30** questionnaires and we received feedback from **50%** of our target group. In this case, it was composed of experts who have been working in the field of foreign languages for *1-5 years* (**60%**) followed by specialists engaged in this area for *more than 10 years* (**33.333%**). Perhaps as expected, because of the European tendencies for a common standard, the most learned language is English (**73.333%**); 11 answers present this as the main language of our target group. However, in Italy, our education certificates permit us to teach more than one foreign language in the different years. Actually, many teachers/trainers teach also French or Spanish: 9 answers therefore additionally mention French and 6 Spanish also.

The majority of respondents of this questionnaire has completed a Master's Degree (**9/15 respondents**) and only 4 have the specific qualification to deliver a language as an L2 [**Modern Languages and Literatures Master Degree, Foreign languages and literatures Master Degree, TEFL** (Teaching English as a Foreign Language), **Master Degree and SSIS** (specialized course for teaching)].

However, 80% of our target group do not teach specific language programmes (**Language for Specific Purposes**) and the rest of the percentage focus on language for **commerce, accounting and tourism**. Despite this aspect, respondents feel adequately prepared in specific language training courses and rate themselves as having a high level of knowledge and professional competence. Teachers and trainers interviewed are keen on thinking that the qualifications needed to become a teacher/trainer have to lead to a high level degree, personal qualities and experience, foreign language subject knowledge and professional skills. The study, nevertheless, has to be enriched by the continuous need to improve and develop professional knowledge and competencies thanks to the **interrelationship among self-improvement,**

**further/non-formal education, other teachers, seminars, conferences, training courses and participation in ongoing professional development courses.**

Thanks to strongly personally enriched professional training, the first category of our target group (trainers and teachers) bases its teaching on the direct teaching method, the direct involvement of the student during conversations and listening to the foreign language in real life situations. At the same time, it is important not to forget that students should be prepared to use CLIL (Content and Language Integrated Learning) methodology, so, the teaching of different subjects using the target language as a vehicle.

Despite the complexity of the Italian teaching context, teachers and trainers feel generally satisfied about their teaching thanks to the opportunity for personalized educational pathways and the innovation that can be introduced to teaching methods.

Alongside state schools, in Italy, there are different kinds of private schools too. Until 2005, the activities of private schools were under the supervisions of the Ministry of Education. Law 27/2006 revoked the article providing this subordination so that **private schools are no longer subjected to such restrictions**. As a result, anyone today is free to undertake such activities without any type of recognition and control by the Ministry of Education. Obviously, it's necessary to follow some strict fundamental bureaucratic rules such as having a **VAT number**, **being a member of the local Chamber of Commerce**, obtaining the **sanitary permit** from the Local Health Authority, as well as possessing excellent **organizational skills** or having some **capital** to invest in the business. Most of them are either authorized or given legal recognition by the state, and many receive state funding and must therefore adhere strictly to central government directives on syllabi and curricula. Private language schools can be enrolled in *regional registers* and obtain accreditation. This registration is not compulsory but it is a sort of guarantee of high training quality and allows schools to offer courses supported by the region and release recognized certificates and qualifications. Teachers' qualifications must also be recognized. As a result, naturally, there's little difference between the quality of education in the state and private sectors. *The majority of private schools duplicate the curricula offered in public schools*, with perhaps the inclusion of a few extra courses. In general, the standard of

education does not vary greatly between state and private schools, however, unlike state schools; the private ones can offer certain benefits.

Generally, the current situation of language schools as private providers is increasing. **Franchising** for instance is a good solution for opening a language school with few restrictions and with a lower budget. It could offer the possibility of working using a famous brand, continuous training and guarantees that courses are organized by a skilled franchisee. Important foreign language education providers are Foreign Language Cultural Institutions: they design language courses, offering both general and special ones, but also [Diploma](#) examinations on behalf of the [Ministry of Education](#) of their country, since they are official qualifications for non-native speakers certifying levels of competence in a foreign language, which are officially and internationally recognized. The diplomas are subdivided into *six levels*, each one corresponding to a certain proficiency level as described by the [Common European Framework of Reference for Languages](#). After following a language course, students can have access to an exam which certifies their knowledge. The exam varies according to the language and has to be paid separately from the course fee. **Each language has its standardized tests that assess someone's proficiency in that foreign language.** Alongside private schools, foreign language **associations** too have an important role in this field of teaching.

Unfortunately, while state school teachers feel more involved in the need for regulation in foreign language teaching and training, private school teachers are seen to be “apart”. Results of the administered questionnaires for this target group represented a sort of failure: out of 45 language school providers interviewed, we achieved only 2.7% of responses.

It is very complicated to have a more realistic overview but we can say that despite the two respondents having had experience in this domain for **more than 10 years**, our target was above all providers who have no more than 5 employees (**66.666%**) and these two private schools invariably find their customers in companies who invest in training even if, generally, the results of this questionnaire show a target group (made of private schools, franchising and associations) offering the same kind of services and oriented on giving **training in general English, Academic English, Training Foreign Languages Courses for private persons, Translations and Interpreted, Tests and Exams in Foreign Languages**. Only in one case



did we find Italian as a foreign language. In this context 5 providers out of 6 offer sector-specific language courses (foreign language for business, specific programs (sector-specific language courses), general courses of language) especially in the domain of tourism, IT and automotive even because the *request for sector-specific language courses is very low* while international certificates of language and mobility abroad are the two main services included in the training for a better improvement.

Of course also language providers as well as teachers and trainers have to invest in their personal education to ensure a high level of professional knowledge.

In the framework of the continuous need to **improve** themselves and to **respond to European needs and trends**, industries also show a particular interest in investment into worker training. The *automotive industry* has very long established origins in Italy and while it had big success in the past, the situation then started to change. In the last few decades globalization and the ICT revolution have fostered a substantial industrial and geographical reorganization in the automotive industry. The study of innovation in the automotive industry deserves careful attention, since it is a key determinant of the long-term growth of an economy. Over the years, the Italian automotive market demonstrated itself to be very *competitive at an international level*, but as far as the domestic market is concerned, the recovery is still awaited. In Italy in 2014 the market was still depressed and production capacity continued to be under-realized with no hope of a rapid turnaround. In the same year, because of the economic crisis, in Italy we had the greatest number of old vehicles in Europe. After several years of recession, in which there was a drop in car buying, Italy is now experiencing a recovery.

In this context, *industries feel the need to be able to extend their market and to be able to communicate with the rest of Europe and the world itself*. Out of a sample of 26 respondents we achieved a percentage of **11.5385 %**. We have obviously taken into consideration all the answers and, as we can see, our target is made up of differently sized companies working in the automotive industry for more than 10 years.

In only one case did we have a large company with 2,100 employees but all of them considered linguistic abilities absolutely crucial. It is for this reason that we had good feedback to the question of which foreign languages are requested in this sector. Our questionnaire indicated



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that **Managers and Executive Directors can manage themselves easily in a foreign language situation** while **employees are required to have a basic knowledge**. So, the general level of skills in foreign languages requested and the level of expertise achieved match. Perhaps because of the realisation of the importance of foreign languages, we can see that our target group has invested and invests in training for employees to grant basic competences. Our three automotive industries all succeeded in the final objective of their training courses (**to deliver competences thanks to the organization of training in groups, to achieve the B1/B2 level of a foreign language and to improve knowledge and language skills in English**).

However, **33.3%** of respondents do not consider sector-specific language training necessary for better work. **66.7%** rate the importance of self-improvement and that knowledge of an L2 is fundamental for the working life of a multinational enterprise.

## 2. TOURISM INDUSTRY

### 2.1. Malta needs analysis summary

The current situation for EFL teachers/trainers and education possibilities and different recognised qualifications for foreign language teachers

- The most important initial step is to provide a qualification which will enable the applicant to be awarded a permit by the ELT Council, which forms part of the Ministry of Education in Malta.
- There are 47 registered schools around Malta and all are registered and licensed by the EFL Council.
- Basic requirements are as follows:
  - TEFL Induction Course; An A 'Level in English or a pass in the TELT exam OR CELTA, CertTESOL or any equivalent higher qualification recognised by the Malta Qualifications Council; a clean police conduct certificate;
- There are 5856 registered and licensed teachers working in the EFL industry in Malta.

Opportunities for Continuous Professional Development of trainers



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- CELTA/CertTESOL; DELTA/ DipTESOL; MA TESOL provided by the University of Malta
- Train the Trainer Course

### Overview of Teachers/ Trainers questionnaire

- The majority of teachers/trainers that filled in the survey have worked in the EFL industry for over 10 years.
- The majority of teachers/trainers who filled out the questionnaire had a CELTA/CertTESOL, A few only had a basic TEFL Induction certificate and others had all three courses.
- The percentage of teachers who have taught ESP classes was low.
- The majority have experience teaching individual students general English; exam classes and Business English classes were also highly prevalent with many teachers combining experience with individual general English and one of the specialised courses.
- Technical courses are the least likely area where teachers have expertise, although it is interesting to point out the varied subjects in which the teachers/ trainers have experience in teaching.
- Many teachers do not feel that they have the sufficient background knowledge or training to consider themselves experts in the subject
- All participants agreed that personal qualities and experience are essential to be able to train in a specialised subject.
- In Malta, there are many opportunities for professional improvement. Continuous professional development is essential for teachers to retain their permits. Teachers/trainers must complete a minimum of 8 hours of yearly CPD totalling 32 hours every four years for their permit to be renewed.
- Their preferred areas to aid in development are seminars, conferences and on-going professional development training/general training courses.
- The most common form of employment in the ELT industry in Malta is on a casual part-time basis.

- The use of the different methodologies is spread out quite evenly, with the CLT method being quite prevalent.
- Unfortunately, there seems to be an immense lack of training being given in ESP subjects.
- Training given to teacher/trainers was based on methodology, lexis, motivating students, dealing with teenagers, integrating phonology, blended learning and creativity.
- According to the results of the questionnaire, 85.7% of the teacher/ trainer respondents stated that improving their professional career is an important goal for them.
- The overall majority of teachers are satisfied with their current job and prospects for furthering their career development.
- Although these scores were high, still dissatisfaction persists, specifically with relation to pay and opportunities provided for growth.

#### The legal background of language schools

- For a language school to be able to operate, it must be licensed by the Ministry of Education.
- It is important that a school abides by the policies established by the ELT Council to promote good practice, achieve policy uniformity, manage quality and maintain compliance. For this licence to be granted, the school must abide by a number of prerequisites.
- Once the school is established, it must abide by the Policy Guidelines for licensed EFL schools. These policies cover: qualifications for DOS; ADOS and Academic managers; absence of DOS; changes in DOS position; minimum qualifications for teacher permits; use and approval of annexes; TEFL course approval; accommodation services; NSO statistics; care of minors; preparation for yearly monitoring and academic visits.

#### Overview of language school questionnaires

- It was difficult to collect this data due to the competition between schools in Malta.
- There are currently 47 licensed language schools operating in Malta

- The language school providers that filled out the questionnaires are all situated in St. Julian's, Sliema and Swieqi and have all been in operation for more than 10 years. This was a salient point as it means that they are well established, offer course variety and have the number of students to back up their opinions.
- Most of the schools in Malta are privately owned
- The number of employees employed by the company all year round (not including seasonal staff) ranged from 12 – 45 employees which includes staff and teacher/trainers.
- None offered any form of educational mobility for their staff.
- Specialized language courses are tailor- made depending on the industry and needs of the company visiting the school. All schools agreed that they provide language courses based on a company's individual requirements when filling in the questionnaire.
- All schools also offer the opportunity to learn foreign language courses (in this case English) for specific industries.
- The results of the questionnaires also pointed out that the demand for specific language courses is “good”, with only one school saying it was “poor”.
- There are many opportunities for career development, including sponsorship by the schools and also by the ELT council. The only opportunity that teachers haven't had is the opportunity for mobility.
- Frequency is another crucial factor due to the legal requirements of CPD. It is important to give the opportunity for teachers to reach their CPD hours and it should be provided by different governing bodies. This is especially imperative for seasonal teachers as most of the year they have their studies to contend with and may not always have time to attend CPD sessions.

### The current situation of the Tourism Sector in Malta



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- When discussing the current situation in Malta, it is important to note the situation in Europe as that directly affects Malta. Malta is part of the World Tourism Organisation (UNWTO) and the European Travel Commission (ETC).
- It is not surprising that the highest amounts of inbound tourists visit Malta between June and September. This is peak season, not only for the ELT industry but across the board for any business connected with the tourism industry. The chart below also shows how seasonal the tourism industry is according to the amount of guest nights registered.
- Recommendations made by family and friends is the most popular proving that word-of-mouth is one of the most effective ways of encouraging people to visit Malta. This ultimately affects the ELT industry and many schools, including am Language Studio, depend on this strategy and ensure that standards are kept as high as possible to provide clients with the best possible service.
- The main purpose for tourists visiting Malta was for “holidays”. When the information is resegmented, English Language visits amounted to 4.6% of the total market- language holidays in Malta are normally combined with other segments and EFL tourists often say that their reason for choosing Malta is the combination of great weather, culture and English. Other factors, as seen below, are the value for money, connectivity and hospitality.

#### Overview of Stakeholders from the Tourism Sector

- All of the stakeholders that took part in filling out the questionnaires are well-established and have worked with am Language Studio for many years. The companies were primarily small or medium- sized operations, although there was some variation.
- All companies employed a significant number of employees with the small to medium sized operations employing between 90 – 250 employees, totalling 510 employees. The hotel employs 250 staff and the large/ corporate organisation employs 400 employees.
- All stakeholders agreed that foreign language skills are highly important for their employees. This is obviously an essential trait and employees deal with clients and need to be able to communicate effectively.

- All agreed that English is foremost, followed by Italian and French. It is also important to note that when asked directly which language is the most valued and needed foreign language in the sector, all stakeholders agreed that it was English.
- A strong if not proficient level is required across the board for all stakeholders regardless of employee position.
- The objective of the questionnaires was to get concrete information about what is going on with our stakeholders specifically to do with the tourism sector and the link between that and improving on language skills to aid in the professional world. The bar graph shows what, if any, courses have been organised by the stakeholders for their employees.
- Objectives for training of English skills stemmed from the need to improve general skills. Other courses provided were French language courses for front line staff as it was imperative to have communicative ability and knowledge when dealing with clients. An issue which was highlighted to us is the lack of interest from employees to actually follow a course outside of their work responsibilities. Other training consisted of in-house service training which is more practical than linguistic.
- The need for job or sector- specific language courses for employees seems to divide opinion exactly, with 3 stakeholders stating that it is of importance and 3 stakeholders stating that it isn't. The reasons for stakeholders agreeing with the importance of the courses were that it helps their staff be more efficient and professional and the importance of facilitating communication between employees and guests.
- According to the information gathered from the questionnaires, the general opinion is that sector- specific foreign language knowledge within the organisation is of high importance across the board with regards to employee levels.
- When asked whether the offer of specialized language courses for the sector is sufficient, many agreed that it was, with few deciding that they didn't have enough information to make a decision and others that used in- house training and so therefore had no need and had no input in the information.
- The provision of job- specific language courses is imperative but the quality and availability of the specialized courses for the sector need to be of a competitive level to realistically enter the market. Most stakeholders agreed that the level is sufficient, with

two stakeholders either saying that they have no knowledge of this subject or that their knowledge is insufficient due to the fact that they give in- house training workshops.

- After completing the questionnaire, the stakeholders were asked whether they would be willing to cooperate with us in order to develop the specific language training modules for the sector. The majority agreed but a minimal number did not agree to this.



## 2.2. France needs analysis summary

Language teaching in France is carried out from primary school age and children are expected to learn 1 or 2 foreign languages depending on their study choices. Languages are generally taught traditionally without an emphasis on oral production and as such adults often lack confidence in speaking. As English has now become the international business language there is a need for professionals within companies to have the ability to converse and operate in English. Other languages may also be needed but on a much lesser basis.

A significant industry has developed whereby there is a need for foreign language teaching outside the educational environment. It is a very competitive marketplace and business is generally won through competitive pricing and business relationships. Some language schools have joined together into networks of providers in order to compete to win nationwide contracts offered by the larger companies. Overall, the language industry's main focus is on providing English lessons to French people and to this end provides a specialised service which may be tailored to the needs of an individual, the company or even the industry sector itself.

In order to look at how language teaching can be improved with relation to the trainers, the language schools and the customers, a needs analysis study was proposed. Desk research was carried out to analyse the current situation in France and at the same time 3 questionnaires were produced focussing on each of the three target groups.

- Trainers, to assess their needs in terms of their current teaching abilities and their potential career development. The questionnaire was provided in both English and French.
- Language Schools, to assess their needs in terms of delivering language courses taking into account both their customers and their trainers. The questionnaire was provided to schools throughout France, via the Can Speak network.
- Customers, within the tourism sector were invited to complete the questionnaire, both existing and potential customers.

A reasonable amount of questionnaires were completed in all areas – 47 teachers, 9 Language schools and 15 organisations in the tourism sector. Although they are not large sample sizes, the results give a fairly good indication of the current situation and requirements of these 3



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target groups. The research and the questionnaire results will be carried forward to the next stages of the Prolant-CAP project in conjunction with results from the other partner organisations.

### Analysis of the current situation for foreign language teachers and trainers

In France, a teacher is seen as someone who works within the educational system, whereas a trainer does not and works in the field of continuing education for adults. A trainer by necessity needs to be flexible and adaptable to the diverse needs of their learners, different from the school system where the programme is imposed by the state.

Education possibilities and different recognised qualifications for foreign language teachers in France

In the majority of training centres in France, recognised qualifications and/or experience are required, although some trainers have started with no formal teaching qualifications just that they are a native speaker. Trainers of languages other than English tend to be more qualified and normally have a degree or Masters in the required language, as well as being native speakers.

For French trainers, they generally follow the standard French education system, normally degree and then Masters, but for other languages the trainers often arrive with qualifications that have been obtained outside of France. It can be difficult to study in France, although the British Council, the Goethe Institute and the Italian Cultural Institute offer initial courses and qualifications in teaching their languages. France has a system of recognising skills and experience through VAE (validation of experience gained) which can be requested by anyone, although it could be difficult as a minimum of 3 years' experience is required.

### Opportunities for Continuous Professional Development of Trainers

A French trainer could possibly develop themselves through carrying out research in a particular field of interest, although for other language trainers, it is often the case that they

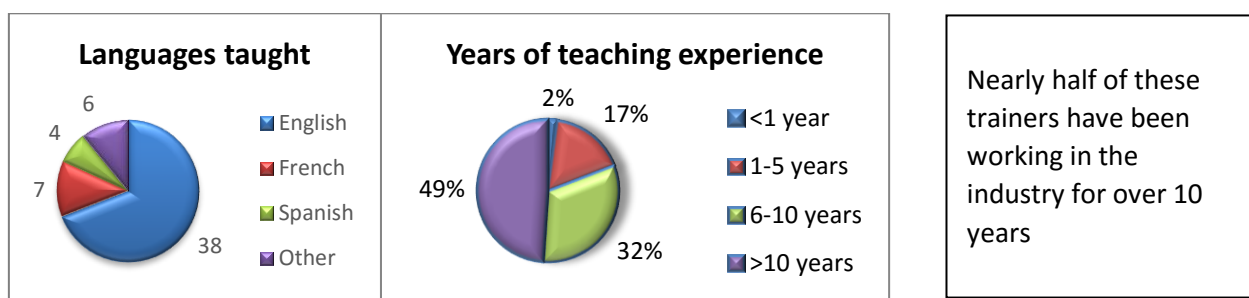


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would need to access further training outside of France. For English teaching some options do exist in France itself through the British Council and similar organisations, which may be followed in person or by distance learning and sometimes there is the possibility of in-house training. But generally, trainers do not have much continuing professional development, other than on-the-job training, peer reviews and possibly attending conferences or seminars. The provision of continuous training for language trainers in France is insufficient but highly necessary in order to develop trainers & the profession.

### Overview of Trainers questionnaire

The questionnaire was provided to internal trainers of CNTC, ones within the Can Speak network and personal invitations to other trainers. In total 47 trainers in various locations in France responded to the questionnaire which had been provided in both English and French, so that non-English speaking teachers could also respond to the questionnaire.



In terms of qualifications, it may be sufficient for an English trainer to just be a native speaker with no formal training qualifications, although many do have basic TEFL or CELTA qualifications. For trainers of other languages they normally have at least a degree in the relevant language and quite often have a Masters as well. In France most language trainers tend to specialise in teaching to people within businesses or to private individuals. A number are also involved in teaching technical language and are often involved in tests and exams. E-learning & blending learning are also an important area, especially for English trainers.

In terms of methodologies used, the majority use the direct method of teaching, i.e. they teach solely in the target language and a large number also concentrate on communicative approaches. Although a significant number said that they used the CLIL method, but they have possibly not been trained specifically in this or possibly don't understand the differences between CLIL and

ESP. 27 out of the 38 English trainers teach ESP and 11 of the other language trainers teach 'objective specific' language courses.

The majority of trainers consider that they develop their teaching abilities mainly by self-development or through other teachers. Some attend seminars & conferences to improve knowledge, with a fairly low number attending professional development courses. Apart from 2 trainers all the others stated that they want to improve their professional career through training, further qualifications, lesson/programme development, knowing about new materials and methods being some of the main reasons.

The majority of trainers are fairly satisfied with their current job and their prospects, with few being dissatisfied but also with few being very satisfied. Overall, the large majority of trainers stated that they would like to develop and progress in their careers, as well as have their employment status and pay improved.

#### Analysis of the current situation of language schools

In France, every professional training service declares their activities with their regional 'préfecture' and provides a summary overview of their teaching activities and finances every year. But, training providers do not need to be registered if they do not have direct contracts and operate only as subcontractors for a registered training centre; if they only provide training to private individuals on a personal/leisure basis; or if it is an internal function within an existing organisation.

Every declared training organisation and independent trainer is included in a public list which can be consulted through the government internet portal, there are 2 relevant codes for language related training - 131 Français, littérature et civilisation françaises & 136 Langues vivantes, civilisations, étrangères et régionales. There are currently 4380 organisations which appear within one or both of the codes.

To work with businesses a training organisation needs to develop relationships with OPCAs which are the official training bodies who help companies organise the financing for training courses. Different OPCAs exist for different industries and each company pays 'training contributions' to them for the Continuous Professional Development of their employees. In

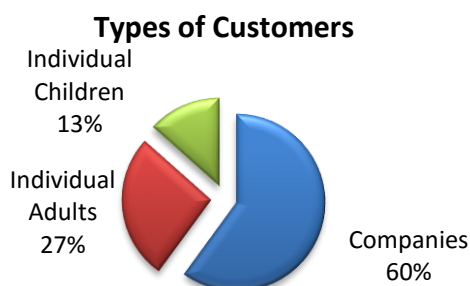
March 2014 a new law was passed which has reformed the system of financing for training and came into effect from 2015.

A training organisation by itself or as part of a group/network can propose specific training programmes for a specific industry sector to the relevant OPCA. Having this type of specialised programme, for example in the tourism or automotive sector could help with winning business for the training organisation with regard to the OPCA. In the future, this is possibly a way forward to develop more industry/sector specific programmes and promote them to the specific OPCAs. Trainers would then need to be trained to deliver the training programmes, in terms of tools, methodology and industry specific knowledge.

### Overview of language school questionnaires

The questionnaires were sent to language schools within the Can Speak network of which there are 22 language centres in France. Nine responses were received from all different regions in France, and every organisation is independent and has been in operation for more than 10 years. They offer a mixture of part-time and full-time work, and the number of trainers ranges between 12-45 trainers per school, with on average being the equivalent of 12 full-time trainers.

This data can give a fairly good picture of the current situation, although obviously it is a small sample size.



The majority of the language schools deliver training to companies, with over a quarter delivering individual (private) courses to adults, and some to children.

Generally the language schools offer a similar range of services to their customers, ranging from language training (face to face, telephone, blended & e-learning), translations to tests and exams. Three schools also provide teacher training, and a small number of additional services are also offered.

All the schools offer business and specialized courses to companies, but not all offer general language courses. The specialized course will be tailor-made to the company / industry needs, as all stated that they develop programmes based on customers' needs. This may also be developed in conjunction with other language schools as all stated that they belonged to a network (in this case – Can Speak). Eight out of the nine language schools stated that they offer language courses for specific industries, such as finance, manufacturing, aeronautical, tourism etc. The schools consider that there is a good too high demand for specific courses tailored to particular industries.

Language schools indicated that their requirement for a language teacher was overwhelmingly to be a native speaker with teaching experience and then to possess the relevant qualifications. Five out of the nine language schools stated that they provide some development opportunities for their teachers, but four do not – nearly 50%. This seems to be an area for improvement as there is a mismatch between the trainers needs within their professional development and what language schools are currently providing. This could be especially important when developing industry specific training programmes.

#### Current situation of the Tourism Sector in France

France is the 5th largest country in Europe (551.695 km<sup>2</sup>), but the 2nd in population terms with around 66 million inhabitants (2014). France shares borders with 8 different nations and is equally accessible to British visitors, and has been the leading tourist destination worldwide since the 1980's. In 2014 France ranked Number 1 in the world for the number of tourists with 83.7 million international visitors.

A total of 80% of the tourist trade in France comes from other European countries. The majority of these European visitors come from the UK and Germany, closely followed by Belgium. The Netherlands and Holland also feature but the remaining countries only make a 'token' contribution. Long distance visitors increased in 2014 (+8.7%), this is primarily due to a rise in Asian tourists from both China and India, both viewed as 'growing future markets'.

Tourism in France accounts for 2 million jobs and 7.4% of its wealth. Worldwide France holds 3rd position in terms of tourism generated revenue (43.2 billion Euros) and as such tourism is a key strategic area for the French Government, especially considering that worldwide tourist

flow is forecast to double in the next 20 years.....from 980 million to 1.8 billion international tourists a year by 2030.

A key official body is the Institute Français du Tourisme (IFT) and 8 Poles d'Excellence have been established, representing different regions. These Poles form a 'National Network' comprising of national & local government, business and the academic education and R&D sectors. There are 2,800 Tourist Offices and Information Points in France, employing 12,000 permanent staff. These offices are co-ordinated by 23 Regional Tourist Federations who in turn are governed by the Fédération Nationale des Offices de Tourisme et Syndicats d'Initiative (FNOTSI).

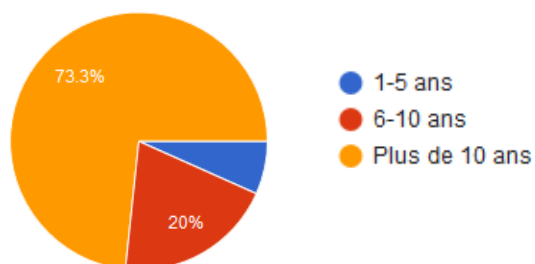
The responsibility for performance in Tourism lies with the Minister for Foreign Affairs & Tourism. In the Autumn of 2015 a multimillion Euro 'Tourist Investment Fund' was launched which was earmarked to support achieving the target of 100 million International Tourists by 2020.

Within the National Education structure the base qualification to work in tourism is a 'BTS Tourisme'. Following on from this a degree is possible, including specialities such as e-commerce, accommodation management or product conception. For Tourism management positions, a candidate is expected to have a BAC+5, i.e. a Masters level specialising in Tourism.

#### Overview of stakeholders for the tourism industry questionnaires

The questionnaire was sent to various different establishments that operate in the tourism sector, these ranged from small businesses to local tourist offices.

#### **How long has your organisation worked in the sector?**



Over 73% of the organisations who answered the questionnaires have existed for more than 10 years so have good experience in the tourism industry

The organisations who responded were small enterprises, with between 1 and 12 employees. The majority had only 2 employees. Nearly 50% of the organisations said that language skills were very important to them, with over 80% stating that they were important. All considered that English was important with Spanish a close second – due to the locality, south west France is near to the Spanish border. Italian is also important due to the proximity to Lourdes with many pilgrims arriving from Italy.

In terms of existing language skills, it was seen that both senior management and managers are considered to have good language skills with employees being less proficient. Only 40% of these enterprises have organised language training courses, so there is a potential new market there, but only 1/3 of them consider that their employees need language training courses adapted to their industry needs.

But, conversely it was viewed that it was very important for both managers and employees to have specific language skills for the tourism industry. Only 2 out of the 15 respondents said that this was not at all important. Asking the question about whether current courses on offer are sufficient, a large majority said they didn't know, with only 26% (4 respondents) saying that they are sufficient and of a good enough quality. Maybe this is an opportunity to create a need within the industry as they don't know what is on offer and what could be provided to them!

As a final point 3 respondents said that they were interested in becoming involved in developing a specific course, so these need to be followed up! But one comment was that the CCI (the French Chamber of Commerce & Industry) is already available to provide them with language training courses.



## CONCLUSION

With the growth in the global economy and increasing competition plus rapid technological development, employees are required to learn new skills in order to be able to use this technology as well as possible and compete in the world market. It requires not only knowing new knowledge and having the ability to progress their career, but also the need to have foreign language skills. English continues to be the dominant language in the world of business.

The needs analysis study reflected an overview of each country regarding the professional development opportunities for foreign language teachers and trainers, the language school situation and industry stakeholders' opinions. The number of respondents exceeded the targeted amount for each country (i.e: 15 foreign language teachers and trainers, 5 language schools, 5 automotive/ tourism sector stakeholders).

The results gave a comprehensive overview of foreign language teachers and trainers' professional teaching experience, qualifications and areas of expertise. Altogether among the countries, nearly 300 responses were received with Slovakian teachers as the most responsive. Half or 50 % of all teachers who replied have been working in the industry for more than 10 years indicating similar tendencies in all countries except for Italy, where this long experience in teaching was possessed by only 33% of teachers. Language trainers expressed the fact that there is a lack of channels for professional development even after many years of experience in the field.

Most language schools rely on teacher and trainer self-initiative for professional development and rarely offer any further training opportunities. However, language schools themselves are starting to see the necessity for training and developing trainers in order to compete in an increasingly competitive marketplace.

The research and questionnaires into the needs of trainers, language schools and customers within the automotive and tourism sector have demonstrated that there is a potential need for industry specific training to be developed.



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