

English in Colombia: An examination of policy, perceptions and influencing factors

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Introduction

Increased political stability, a large young population and an optimistic economic growth outlook based on rich natural resources have thrown a spotlight on Colombia. While there are significant challenges with regard to education quality and access as well as poverty, creating an increasingly skilled workforce has become a government priority as the country looks to build upon the interest it is currently generating. Economic growth is now closely linked to creating a better-educated, English-speaking workforce. Colombia's fledgling middle class also looks poised to further the government's ambitious agenda. However, the decentralised nature of the education system has created challenges in terms of standardisation and accountability, and it is important to examine the true nature of industry demand for English speakers when considering appropriate language benchmarks for the Colombian population.

Methodology

Phase 1

Literature review

In the first phase of the research process we carried out an extensive literature review of current knowledge and available data to shape our research design and situate our investigation in the current context.

Phase 2

Desk research and secondary data collection

In Phase 2 we worked with local language analysts to compile extensive background information on the local education and policy environment. An audit of secondary data sources framed the structure and design of primary data collection in Phase 3.

Phase 3

Quantitative primary data collection

In Phase 3 we collected primary data through two main channels:

- an online survey of 1,000 people from the general population, sampling males and females aged 16 to 50, most of whom were aged 19 to 35;
- an online survey of 78 Colombian employers varying in size from 10 to over 1,000 employees, with the sample taken from managerial and executive staff

Phase 4

Qualitative primary data collection, in-depth stakeholder interviews

The final phase of our research and data collection involved a series of face-to-face and telephone stakeholder interviews carried out in Bogota and Medellin.

Interviews

Government

- Advisor, Foreign Languages Competencies Project, Ministerio de Educación Nacional
- Advisor, Foreign Languages Competencies Project, Ministerio de Educación Nacional
- Human Resources Manager, Ministerio de Educación Nacional
- Academic Coordinator, Secretaria de Educación Medellín Multilingüe

Education institutions

- Head of International Relations, Universidad Tecnológica de Pereira
- Head of Foreign Language Institute, Universidad Tecnológica de Pereira
- Professor, Department of Languages, Universidad Nacional de Colombia
- Head, Department of Languages, Universidad Nacional de Colombia
- Director General, Programa Nacional de Bilinguismo, Servicio Nacional de Aprendizaje (SENA)
- Associate Professor, Centro de Investigación y Formación en Educación (CIFE), Universidad de los Andes
- Director, Departamento de Lenguas, Pontificia Universidad Javeriana
- Professor, Departamento de Lenguas, Pontificia Universidad Javeriana
- Coordinator, Área de Inglés, Universidad Pedagógica

Education professionals

- Country Director, British Council Colombia
- Director of English and Training Services, British Council Colombia
- ELT Projects Manager, British Council Colombia
- Projects and Partnerships Director, British Council Colombia
- Project Specialist, British Council Colombia

English language schools

- Adult English Programme Coordinator, Centro Colombo Americano, Bogota
- Commercial Department, Native Tongue
- Academic Director, Cambridge Instituto de Lenguas
- Manager, Bartonshaw

English study agents

- Executive Director, Global Connection
- Director, Grasshopper International, Líderes de Estudios en el Exterior

Professional associations

- President, Colombian Association of Teachers of English

Key findings

- Colombia is a unitary state, meaning that decision-making and funding is often devolved to sub-national, local and institutional authorities.
- The National Bilingual Programme, now the Foreign Languages Competencies Development Programme, was launched in 2004 with the objective of cultivating Colombian human capital in order to further the country's economic development.
- The goals of the national English language policy include mandatory English in schools and, by 2019, fluency at B1 for secondary school graduates, B2 for university graduates and B2 or C1 for teachers of English.
- The Ministry of Education supports these goals with complementary programmes, but there is currently no national or standardised curriculum.
- The goals of the national English programme may change with governments and ministers of education.
- Today, 45 per cent of the tertiary-age population is in higher education with almost half of students attending private universities, reflecting the limited number and range of public programmes.
- In 2012, two thirds of university entrants were at A1 or less in English, according to standardised test results.
- There is a direct correlation between English language proficiency and educational attainment, private schooling, income and occupation.
- The main reason for learning English is to fulfil university requirements; other key drivers are employability and mandatory English learning in secondary school.
- English language learners tend to attribute strong English proficiency to practice and exposure to English-speaking media, while low proficiency is blamed on a lack of practice.
- Colombians who have not learned English attribute this to the cost and a lack of access; however, they would undertake study to improve their employability and quality of life or to travel abroad.
- Most respondents (59%) and employers (54%) believe that English skills improve employability, but just eight per cent of English learners report that English is necessary for their job.
- Among employers, 45 per cent use English with external clients and 31 per cent use it internally.
- When hiring new staff, 68 per cent of employers believe that English is an essential skill, and 81 per cent of employers rate English as a seven or above in terms of importance on a scale from one to ten.
- Colombian employers recognise English as the universal language of business and globalisation and an essential tool for communicating with clients.

Macro analysis

Education governance

Colombia is the oldest democratic state in Latin America and while its constitution, established in 1886, has seen a number of changes, the general structure of the government remains largely unaltered. Colombia's national government is split into a judicial branch, a legislative branch and an executive branch, which leads the republic.¹ The president is elected for a four-year term, as are members of the Senate and the House of Representatives, and judges selected for the Supreme Court of Justice serve eight-year terms.²

The most significant change to the constitution was in 1991, when the move towards today's decentralised Colombian state was made concrete. Before that there had been a number of attempts to change Colombia's laws, partly to make elections fairer and less corrupt. The Constitution of 1991 led to a number of reforms, the most notable of which devolved significant authority to departments while general responsibilities remained with the national government. The constitution also stated that presidents could not be re-elected, although this has since been repealed and the last two presidents have run for re-election. Since 1991, further reforms have redistributed fiscal and administrative responsibilities in an attempt to make processes and services more efficient and involve a greater proportion of the Colombian population. This idea of devolved and equitable authority reflects both the unitary government and policy and the spirit of the Colombian public, which tends to reject the idea of a single powerful entity. Today, Colombia is known as Latin America's most decentralised country, and while there are some inefficiencies as a result, this devolved model is largely seen as the most appropriate form of governance.³

Colombia is made up of 32 departments as well as Bogota D.C., the capital district. Each department is led by a governor, who serves for four years and is elected by the people, as well as a state assembly, members of which are elected every four years. Each department comprises a number of municipalities that elect their own mayors and councils for four-year terms. Each departmental and municipal government has a budget for and authority over issues including but not limited to security, education, planning and development as well as the monitoring and evaluation of existing programmes.⁴

The population is ethnically diverse, reflecting the wide range of peoples that have inhabited the country throughout its history. It includes a large number of indigenous groups, which make up around 1.5 per cent of the population.⁵ As such, indigenous territorial entities govern certain areas of the country.⁶

The national government and its executive branch comprises 16 ministries, including the ministries of education, labour, health and social protection, information technologies and communications, culture, and commerce, industry and tourism. While ministries sometimes work together to form and implement policy, there is often little coordination between them. This has hampered the approach to certain issues, including English language acquisition.

The Ministry of Education (Ministerio de Educación Nacional, MEN) is responsible for national education policies. However, the unitary government structure means that local governments also have education secretariats that are responsible for education in their respective areas. Colombia's 94 education secretariats provide funding and guidelines for the schools under their jurisdiction, but there is no compulsion to follow the national standards set by the central government. There have been a number of education reforms at both the national and local levels, including the 1994 General Education Act, which mandated the attainment of foreign language skills. A 1996 reform gave the MEN power to use indicators that local governments had to adhere to, although this was modified in 2001 to return power to local governments.⁷ The 1992 Higher Education Act provided further regulations on higher education, including entry and exit requirements, while the 2002 Higher

¹ CIA World Factbook, 2014

² Embassy of Colombia, Washington, D.C. 2012. Retrieved from: <http://www.colombiaemb.org/overview>

³ Frank, J. Assessment of the impact of decentralization: The case of Colombia (1991-2001). Public Sector Group and the Decentralization Thematic Group of the World Bank, February 2004

⁴ Georgetown University Center for Latin American Studies, Political Database of the Americas: Decentralization and local governance, 2005. Retrieved from: <http://pdba.georgetown.edu/Decen/divpolterr.html>

⁵ Embassy of Colombia, Washington, D.C. 2012. Retrieved from: <http://www.colombiaemb.org/overview>

⁶ Frank, J. Assessment of the impact of decentralization: The case of Colombia (1991-2001). Public Sector Group and the Decentralization Thematic Group of the World Bank, February 2004

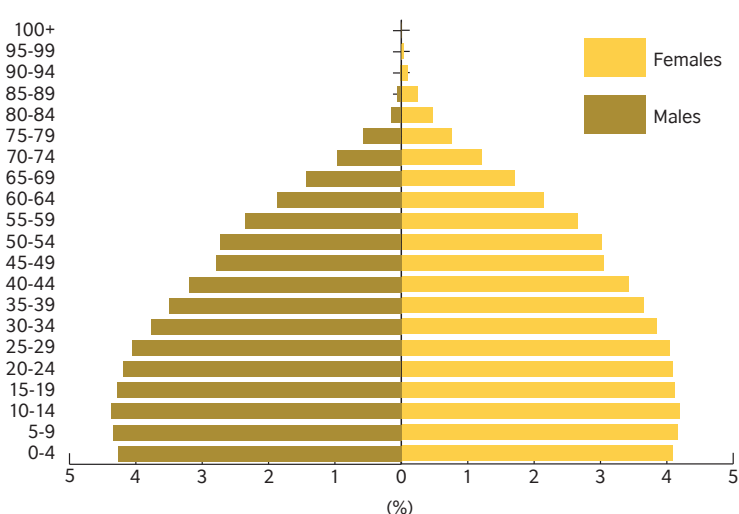
⁷ Sánchez Solarte, A.C. and G.V. Obando Guerrero. Is Colombia ready for 'Bilingualism'? Universidad de Narino, 2008

Education Act addressed entry, exit, curriculums and standards for professional, technical and vocational education.^{8,9} In 2004, the National Bilingualism Act was created to transform language competencies across the entire education system.

Education indicators

Colombia is home to 48 million people, and while the population has remained steady since the 2010 census, it is projected to grow to over 50 million by 2020. The population is young: 43 per cent are under the age of 24 and the median age is just under 29. Those aged 15 to 65 make up around 66 per cent of the population, meaning that Colombia's old-age dependency ratio was lower than Latin American and OECD averages in 2012.¹⁰

Population pyramid, Colombia, 2020



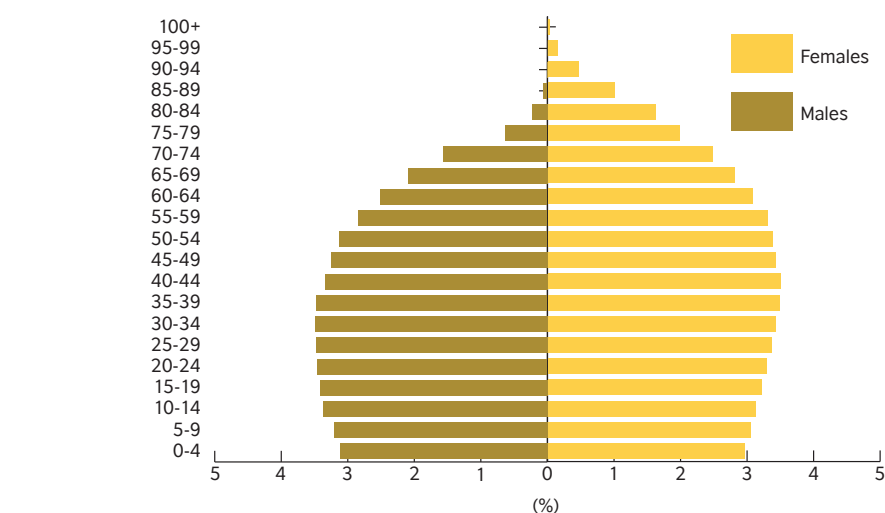
Source: United Nations Population Division, 2014

⁸ NUFFIC, 2013

⁹ De Pineres, J.G. and L.I. Moreno. *Colombian Education. Universidad Nacional Abierta Y A Distancia*, 2013.

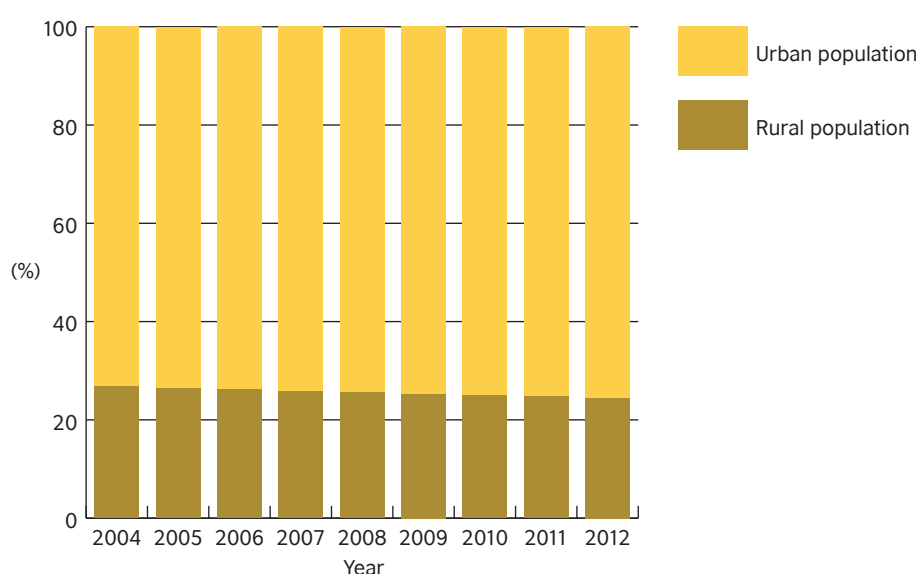
¹⁰ Euromonitor, 2014

Population pyramid, Colombia, 2050



By 2020, the largest population segment will be aged 10 to 14 and the oldest segments will be growing at the fastest rate.¹¹ Population growth will slow in the decades after 2020, and by 2050, the population will be ageing rapidly. This burgeoning young population presents an opportunity for the government to implement far-reaching policies. However, it also presents challenges in terms of resource allocation for public education.

Urbanisation



Much of the young population is clustered in the cities of Bogota, Medellin, Cali and their surrounding areas. Colombia's population is fairly urban: in 2012, 75.6 per cent of people lived in urban areas. By 2030, this proportion is expected to rise to 80 per cent.¹²

Public spending on education in Colombia fell slightly from 4.7 per cent of GDP in 2009 to 4.4 per cent in 2012.¹³ UNESCO estimates that 22 per cent of education spending, or less than one per cent of GDP, goes towards tertiary education.

¹¹ Population Reference Bureau Data Sheet, *The World's Youth*, 2013

¹² World Bank Databank, 2013

¹³ World Bank Databank, 2013

The education system consists of pre-primary, primary and lower-secondary school followed by upper-secondary school, or high school. Upper-secondary education is not mandatory, although there are plans to change this. There are public and private institutions at each education level, and around 85 per cent of primary schools and 60 per cent of secondary schools are publically funded.¹⁴ While nine years of education are compulsory by law, students receive 14 years of education on average.

ENROLMENT IN EDUCATION 2010 TO 2011	Total	Public	Private
Total	12,831,081	10,239,816	2,591,265
Pre-school	961,518	631,149	330,369
Elementary	4,924,341	4,262,700	661,641
Secondary	3,707,307	3,204,121	503,186
High school	1,423,469	1,171,878	251,591
Associate	74,919	22,203	52,716
Technology	181,302	93,745	87,557
Undergraduate	1,125,667	501,412	624,255
Graduate	110,597	30,647	79,950
SENA (workplace education)	321,961	321,961	

Source: UNESCO Institute of Statistics, British Council Education Intelligence Latin America Databank

In 2010, around 43,000 pre-primary and 54,000 primary schools had enrolments of 1.3 million and 4.9 million students, respectively. At secondary level, there were over 32,000 schools and 5.1 million students, of which 27.4 per cent were upper-secondary students.^{15,16}

Pre-primary enrolment has risen to 38 per cent, while primary enrolment is 84 per cent and secondary enrolment is 55 per cent.¹⁷ Enrolment in private schools accounted for around 13 to 17 per cent of the primary- and secondary-age population in 2011, while around a third of pre-primary enrolments are in private schools.

At upper-secondary level students can enrol in general education, which leads to a state exam and either higher education or a vocational stream, from which students can enter the job market. Upper-secondary students can also opt for public vocational programmes through the National Apprenticeship Programme (Servicio Nacional de Aprendizaje, SENA) before entering the labour market.¹⁸

Tertiary enrolment is around 45 per cent, and in 2011, among the population aged 15 to 24, 41 per cent of females and 37 per cent of males were enrolled in tertiary education.¹⁹ In this year, there were 1.8 million tertiary students; this number is on a steady upward trajectory that is forecast to continue over the next decade. In addition to enrolments rising, dropout rates are also in decline, falling from 12.9 per cent in 2010 to 11.8 per cent in 2011.²⁰ Approximately 62 per cent of those in tertiary education are enrolled on undergraduate programmes, while 28 per cent are enrolled in technological, vocational or technical schools, including SENA. There is not a strict delineation between academic and technical or professional tertiary education, meaning that there are programmes that combine the theoretical and practical components of each.²¹ Those enrolled in postgraduate courses made up just six per cent of those in higher education in 2011. However, this may change in the next decade as wealth and access to private education increase and more people complete undergraduate degrees.

¹⁴ Euromonitor, 2014

¹⁵ MEN, 2014

¹⁶ UNESCO Institute of Statistics, 2013

¹⁷ British Council, Education Intelligence, Latin America Databank, 2014

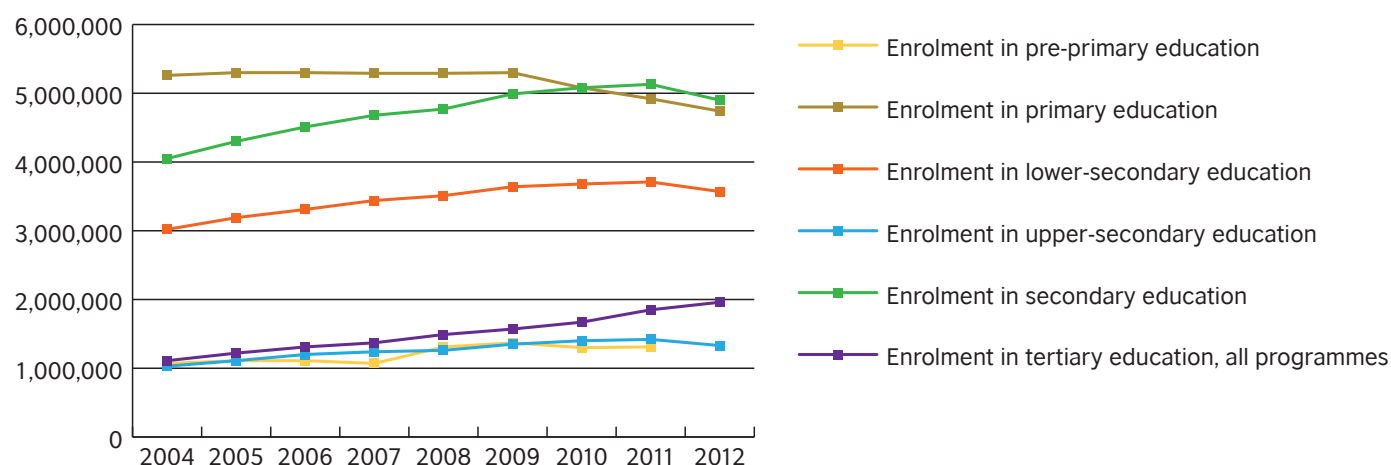
¹⁸ NUFFIC, 2014

¹⁹ British Council, Education Intelligence, Latin America Databank, 2014

²⁰ British Council, 2014

²¹ NUFFIC, 2014

With the exception of those enrolled in technical or SENA programmes, students tend to enrol in private rather than public tertiary institutions; overall, 53 per cent of higher education students, including SENA students, are in the public system. This is largely a reflection of the lack of public higher education places and course options: around 40 per cent of higher education institutions are government funded. Private university fees often run from US\$1,500 to US\$3,500, depending partly on the location, whereas fees at public institutions are means-tested. As such, students from low-income backgrounds may be unable to progress past basic education if they cannot gain public places. As record numbers of students enrol in higher education, national and local governments must continue to reorganise funding in order to provide fair and equal access to tertiary education for its growing young population.²²



Source: UNESCO Institute of Statistics

While the young population is in many ways the key to Colombia's continuing economic growth, it faces significant challenges, including youth unemployment. In 2013, 30 per cent of females and 18 per cent of males aged 15 to 24 were unemployed, and just 38 per cent of females and 53 per cent of males in this age bracket participated in the national economy.²³

National government policy on English language learning

Historical initiatives

The unitary nature of the Colombian state, decentralised governance and diverse regional needs make the implementation of nationwide policies challenging. While the MEN may provide general guidelines and goals, it is ultimately the decision of local authorities to implement changes to policies and programmes. For example, the MEN has not enacted a general national curriculum, instead opting to promote national competencies, which local governments are incentivised to follow.²⁴

Prior to the 2004 National Bilingualism Act there were a number of reforms designed to promote English language learning. In 1982, the English Syllabus was introduced for secondary schools that wanted to adopt it into their curriculums. However, this was largely not implemented, reflecting low levels of language teaching and English language skills among teachers. Schools also struggled with the resulting larger class sizes and classroom management. As such, the 1982 reform was one of the first to highlight the gap between national initiatives for English language learning and the resources, goals and motivations of local educators.

²² Euromonitor, 2014

²³ Population Reference Bureau Data Sheet, *The World's Youth*, 2013

²⁴ NUFFIC, 2014

Over 1991 to 1996, a number of Colombian universities provided professional support and resources for English language teacher training through a national programme in partnership with foreign organisations. While this programme successfully improved teacher training programmes at universities, it did not produce the expected results in terms of teacher development. It did, however, lead to transformations that later influenced policies on initial teacher training. In addition to decentralising the government, the Constitution of 1991 applied the principles of choice and competition to the education sector while still emphasising the importance of foreign language acquisition, including at school level. In 1999, the Curricular Guidelines for Foreign Languages were created. This framework tended to limit teachers' control over curriculums rather than promote foreign language learning. This, combined with the lack of resources and teachers, which persists today, meant that many local authorities lacked the incentives and motivation to adopt the guidelines.²⁵

These reforms highlight that it is essential under an autonomous system of governance for all parties involved - local authorities, teachers and students together with the national government - to understand and commit to a policy in order for it to work. This is particularly important in Colombia, where English is not entrenched in either private or public life, as the impetus for delivering English language learning programmes comes primarily from government policy as opposed to grassroots movements.

English language policy through to 2019

In 2004, the MEN launched the now-familiar National Bilingual Programme (Programa Nacional de Bilingüismo, PNB), which was designed to run from 2004 to 2019.²⁶ With the cooperation of various international partners, the MEN diagnosed students' and teachers' English language levels and created a top-down English language policy. This policy was designed primarily to improve human capital and economic development by increasing participation in the largely English-speaking global economy. Access to English resources, business, education and technology were seen as keys to growth, while the resulting involvement of Colombians in multicultural exchanges and understanding were identified as potential drivers of development.

The objective of the PNB, translated from Spanish, was:

*"To have citizens who are capable of communicating in English, in order to be able to insert the country within processes of universal communication, within the global economy and cultural openness, through [the adopting of] internationally comparable standards."*²⁷

The PNB aimed to make Colombia a bilingual state by 2019. The reform differed from its predecessors in terms of its breadth and duration: this policy applied to all levels of education, from primary to university, and affected both teachers and learners. It also set long-term targets for all involved in an effort to incentivise actors to comply with the framework. The main components included the development of standards for teaching and learning, professional development for teachers, the monitoring and evaluation of competencies, the provision of digital aids to English learning and the identification of solutions for regions that were already bilingual.²⁸

In 2006, the MEN instituted the Basic Standards of Competence in Foreign Languages: English (Estándares Básicos en Competencias en Lenguas Extranjeras: Inglés), which the British Council contributed to. The Standards stated that the evaluation of English language skills should adhere to the Common European Framework of Reference for Languages (CEFR). While other standards were evaluated, this framework was seen as the best fit, despite concerns by some that the framework lacked context for Colombia: many called for a framework that took into account Colombia's diversity and the needs of its economy. This is less of a debate today.

²⁵ Usma Wilches, J. *Education and language policy in Colombia. Exploring processes of inclusion, exclusion and stratification in times of global reform.* Universidad de Antioquia, 2009

²⁶ Herazo, J.D., Jerez, S., Lorduy, D. *Opportunity and incentive for becoming bilingual in Colombia: Implications for Programa Nacional de Bilingüismo.* 2012

²⁷ MEN 2006b. *Estándares básicos de competencias en lenguas*

extranjeras: Inglés. [Basic standards of competences in foreign languages: English.] Bogotá: MEN

²⁸ Usma Wilches, J. *Education and language policy in Colombia. Exploring processes of inclusion, exclusion and stratification in times of global reform.* Universidad de Antioquia, 2009

PROFICIENT USER	C2	Mastery
	C1	Effective operational proficiency
INDEPENDENT USER	B2	Vantage
	B1	Threshold
BASIC USER	A2	Waystage
	A1	Breakthrough

Source: Cambridge English Language Assessment

According to the CEFR, English language speakers fall into one of six categories, ranging from A1, for basic users, to C2, for those who have mastered the language.²⁹ The PNB stated that by 2019, all secondary school graduates should be at B1, while university graduates should be at B2; primary and secondary school teachers were expected to be at B2, while those graduating from teacher training or pre-service programmes should be at C1.³⁰

Pre-school	Primary school					Lower-secondary school				Upper-secondary school		Tertiary education
0	1	2	3	4	5	6	7	8	9	10	11	11+
	A1			A2			B1				B2	

Source: British Council, Education Intelligence, Latin America Databank 2014

The PNB required English teaching to begin in primary school and follow a charted trajectory in terms of the attainment of different levels. The British Council states that learners take 240 hours to move from A1 to A2, 200 hours to move from A2 to B1 and 280 hours to move from B1 to B2. Considering an academic year consisting of 198 school days, students would be expected to study English for at least 80 hours a year in Grades 1 to 3, which is equivalent to two hours of English a week. In Grades 4 to 7, students would be expected to spend around one hour and fifteen minutes per school week on English, followed by one hour and forty-five minutes per school week in Grades 8 to 11. While these estimates do not seem out of reach, they do not take into account factors such as the low level of teaching, large class sizes and the lack of testing and practice outside the classroom, which complicate language acquisition in Colombia. We address these factors in the following chapters.

²⁹ Exam English, Retrieved from: <http://www.examenglish.com/CEFR/cefr.php>

³⁰ Herazo, J.D., Jerez, S., Lorduy, D. Opportunity and incentive for becoming bilingual in Colombia: Implications for Programa Nacional de Bilingüismo, 2012

The MEN created the following interim goals for PNB for 2010-2014:

- 40% of secondary school students at B1 upon completion of Grade 11
- all students to learn English in primary school (as mandated by law since 1994)
- all secondary school teachers at B2
- 80% of graduates of teacher training and/or pre-service programmes at B2
- 40% of university graduates from other programmes at B1
- 20% of university graduates from other programmes at B2

In 2012, PNB was renamed the Foreign Languages Competencies Development Programme (Proyecto de Fortalecimiento al Desarrollo de Competencias en Lenguas Extranjeras, PFDCLE) in order to make it more inclusive: as Colombia has over 60 indigenous languages, along with Creole and Spanish, some of the population is already bilingual. Under the new Minister of Education, plans for English language learning continue under the Colombia Bilingue 2015-2018 scheme, with the goal of raising English proficiency to seven per cent via initiatives addresses teacher needs, improved methodologies and high-quality materials.

English teacher training

By 2014 the MEN had condensed the original priorities of PNB - now PFDCLE - into four:

- in-service teacher training and coaching
- pedagogical support
- evaluation and assessment
- institutional capacity building

There is some debate over what the PFDCLE programme actually covers. For example, one researcher states there are three goals that target English learning in formal education: proficiency standards for basic and upper-secondary school, a testing system and the professional development of teachers.^{31,32} Teacher training and support is a well-publicised issue in Colombia: in 2013, it was reported that three out of four English teachers were not at B2 and 14 per cent had not reached A1.³³

To address this, the MEN designed an educational curriculum and content for upper-secondary schools, and it continues to monitor English CEFR levels through the upper-secondary graduation exam, SABER, and other exams, including the university-level SABER PRO. The MEN is also promoting extending school hours for primary and secondary schools as well as access to digital resources for students and teachers. The content provided for basic education teachers comes in the form of online courseware, materials and strategic support, although some teachers have been unable to access this due to low digital competency and connectivity. At higher education level, MEN support should involve less curricular support and more promotion of best practices and the importance of foreign language acquisition. Both the government and universities run ad-hoc programmes that expose English teachers to external expertise, such as visiting professors.³⁴ At tertiary level in particular, buy-in from local authorities and institutions is essential.

³¹ Herazo, J.D., Jerez, S., Lorduy, D. *Opportunity and incentive for becoming bilingual in Colombia: Implications for Programa Nacional de Bilingüismo*, 2012

³² British Council, Education Intelligence, *Latin America Databank*, 2014

³³ Howlett, K. *Colombia's Problem with English*. *Colombia Politics*, 28 May, 2014. Retrieved from: <http://www.colombia-politics.com/colombias-problem-with-english/>

³⁴ British Council, 2014

The British Council in Colombia has worked closely with the MEN on numerous English language initiatives, ranging from outreach to local authorities to support for technical education. One programme, the Skills Building Programme in Foreign Languages (PFCLE) targets both students and teachers and sets goals similar to those of PFDCLE and the interim 2010 to 2014 goals. The initiative calls for 40 per cent of students in Grade 11 to be at B1 and 20 per cent of those in university and 80 per cent of graduates to be at B2. It also calls for all teachers to be at B1. Currently, just a quarter of teachers reach the level they are expected to.³⁵

As there are no formal mechanisms to ensure the standardisation of the English curriculum, provision varies greatly. The MEN provides targets for local governments but decision-making power often rests with the teachers themselves. This is problematic for a number of reasons. As public primary school teachers are responsible for teaching all subjects, their skills and motivations for English language teaching may not be high enough to deliver English lessons let alone to develop pedagogies for foreign language teaching or the teaching of other subjects in English.³⁶ Teachers' lack of resources and preparedness remains one of the most prominent issues with English acquisition in Colombia, although funding for the coming years hopes to address this.

Public sentiment

The PFDCLE goals for 2019 are generally seen as overambitious. The 2012 SABER PRO results show that 31.5 per cent of university entrants were below A1 and 35.8 per cent were at an A1 level, while just one per cent of secondary students can be considered truly bilingual.³⁷ This is well below the targets of 40 per cent at B1 for both groups. While there are significant barriers to achieving the 2019 goals, including a lack of progress-measuring mechanisms, Colombia is still making progress towards its goals for improving human capital. The National Strategy for Human Capital considers the government's goals for Colombian involvement in international scientific exchanges and innovation, higher education and research abroad, and the internationalisation of higher education. Overall, Colombia's Human Development Index score rose 29 per cent over 1980 to 2012, representing annual progress of 0.8 per cent.³⁸

The relationship between English and human capital growth and internationalisation has changed. In the past, English was seen as a subset of internationalisation, which is a prerequisite for growth. Today, however, English has become a stand-alone factor on the competitiveness agenda and is therefore being promoted as such nationally.

³⁵ Granados Beltrán, C. *Challenges of Bilingualism in Higher Education: The Experience of the Languages Department at the Universidad Central in Bogotá, Colombia*. *Gist Education and Learning Research Journal*, 2013

³⁶ McDougald, J.S. *The State of Content and Language Instruction in Colombia*. *Latin American Journal of Content & Language Integrated Learning*, 2009

³⁷ Granados Beltrán, C. *Challenges of Bilingualism in Higher Education: The Experience of the Languages Department at the Universidad Central in Bogotá, Colombia*. *Gist Education and Learning Research Journal*, 2013

³⁸ United Nations Development Project. *The Rise of the South: Human Progress in a Diverse World*. 2013

Geography

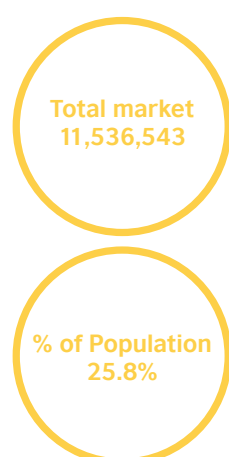
Colombia is made up of six regions that are ethnically diverse and geographically dissimilar. As such, these regions can be seen as distinct micro-economic markets. The regions include the Pacific region, which runs along the west coast, the Amazon region in the south, which includes the remote areas around and including the Amazon rainforest, the Orinoquia Region in the north-east, which contains vast plains and is sparsely populated, the Andean region, which runs up the centre of the country and encompasses a number of Colombia's larger cities, and the Caribbean region to the north. The Caribbean islands off the coast of Colombia are sometimes considered as the sixth region, known as the Insular region. Each of these regions and the departments within them house medium-sized cities. As the infrastructure connecting urban areas is often weak, internal migration is relatively low, and even the growing population in Bogotá D.C. does not encourage population density in other cities or areas. Long travelling times between regions and the lack of infrastructure, including roads and electricity, in some areas are important factors to bear in mind when considering the provision of teacher training, curriculums and educational priorities.



Source: University of Texas at Austin, 2008

English language learning analysis

Macro-evaluation of English learners



While Colombia is home to many indigenous languages, English is the second most widely spoken language, being spoken by 4.1 per cent of the population.³⁹ The British Council estimates that 11.5 million people in Colombia - just over a quarter of the population - are studying English via public and private formal education from primary to tertiary level as well as through private English language training courses and self-access learning.

Source: British Council, Education Intelligence, Latin America Databank 2014

Public education penetration

Most students studying English are in public schools, which usually offer English as part of the curriculum. The gross enrolment ratio at primary level is 106 per cent, while lower-secondary enrolment is 101 per cent and upper-secondary enrolment is 76 per cent (UNESCO; gross enrolment ratios can exceed 100 per cent due to the inclusion of students who are over-age, under-age or repeating grades). Most students - 81 per cent of primary and lower-secondary students and 77 per cent of upper-secondary students - are in the public sector, while 85 per cent of primary schools and 60 per cent of secondary schools are government funded (UNESCO). The numbers of students enrolled in public schools are as follows:

Primary education, public institutions	3,846,515
Lower-secondary education, public institutions	2,868,000
Upper-secondary education, public institutions	1,013,972
Total secondary education, public institutions	3,881,972

Source: UNESCO Institute of Statistics

³⁹ Colombiestad, 2014

Under the PFDCLE mandate, English is being taught to all students in basic education, with the aim of ensuring all students are at B1 at the end of Grade 11 by 2019. Today, just seven per cent of Colombians graduate from Grade 11 with at least A1 English, and the highest-proficiency students tend to graduate from schools in high-income areas.⁴⁰

The effectiveness of English teaching in public education is limited by a lack of teacher training, resources and funding, large class sizes and unenforced standards. While some local authorities administer and fund their own programmes, decentralisation means that the provision and implementation of national policy and funding is often uneven. While some feel that funding is adequate and distribution to the correct programmes and areas is the main problem, others feel that there is a serious lack of resources and that funding varies dramatically from one municipality to the next under the unitary structure.

Private education penetration

English teaching in private schools is also government mandated. As private schools generally have more and better resources, including better-qualified English teachers, language acquisition in these schools - as measured by SABER test scores - is generally more successful.⁴¹ Around 18 per cent of primary students, 19 per cent of lower-secondary students and 23 per cent of upper-secondary students are in the private sector (UNESCO). This amounts to the following enrolments:

Pre-primary education, private institutions	367,260
Primary education, private institutions	861,951
Lower-secondary education, private institutions	681,335
Upper-secondary education, private institutions	346,717
Total secondary education, private institutions	1,028,052

Source: UNESCO Institute of Statistics

Private schools tend to follow a different academic calendar that runs from September to June (Calendar B), while most public schools follow Calendar A, which runs from February to November. Both public and private students sit SABER examinations in Grade 11. These exams will soon also take place in Grade 5 and Grade 9. A small number of elite, high-cost bilingual schools offer a more comprehensive English language education, including using English as the medium of instruction for other subjects. These schools produce graduates with high English proficiency.

The cost of attending private schools is high: fees generally range from US\$50 to 450 per month, averaging US\$300 per month in larger cities.⁴² As the minimum monthly wage is US\$315, private education is not an option for many households, particularly those in more remote areas. In 2011, private education spending as a share of GDP was 2.9 per cent, compared to the 4.8 per cent of GDP spent by the government.⁴³ In 2010, the private education market was worth around 16 billion Colombian pesos.

⁴⁰ Peters, T. 93% of Colombian high school graduates speak no English. *Colombia Reports*, 2012

⁴¹ Sanchez Jabba, A. *Documentos de trabajo sobre economía*. Banco de la Republica. 2013

⁴² Euromonitor, 2014

⁴³ MEN, 2014

DECILE	% OF TOTAL EXPENSES ON EDUCATION
1	1.2%
2	1.2%
3	1.4%
4	2.2%
5	1.9%
6	2.7%
7	3.2%
8	3.6%
9	4.4%
10	6.0%

Source: British Council, Education Intelligence, Latin America Databank 2014, DANE (2009)

Education spending increases significantly with household income. Almost 70 per cent of households spend less than three per cent of their total expenditure on education, while the richest ten per cent of households allocate twice as much as a proportion of expenditure.

English in higher education

Higher education in Colombia includes technical and vocational education as well as undergraduate and postgraduate studies. Decentralisation means that universities and technical and vocational institutions are autonomous bodies. In 2011, there were 288 higher education institutions (excluding SENA schools) of which 208 (72.2%) were private. Private higher education is becoming increasingly popular: 47 per cent of tertiary enrolments are in private institutions.⁴⁴ This reflects rising disposable incomes and the proliferation of private institutions, particularly in urban areas, although it also highlights limited access to and funding for public universities.⁴⁵ While there are processes in place to ensure equity in resource distribution, higher education funding often benefits a handful of institutions in practice. As such, many public universities report being underfunded and unable to expand or improve their provision, making private institutions increasingly attractive.⁴⁶ A lack of public provision was a motivating factor for some of the 3.2 million secondary school graduates who did not continue to higher education in 2011. In this year, almost 58 per cent of males and 46 per cent of females in the workforce did not have a professional or higher educational qualification.⁴⁷

Most higher education institutions are located in metropolitan areas: 41 per cent of undergraduates and postgraduates attend schools in Bogotá, while a further 14 per cent study in Medellín. Other cities with large student populations are Cali (6%), Bucaramanga (5%), Barranquilla (4%) and Cartagena (3%).⁴⁸ In 2012, the most popular disciplines for university graduates were economics, management and accounting (30.5%), engineering, architecture, urban planning and related subjects (23.4%), social and human sciences (19.3%) and education (11.4%). The British Council reports that graduates who study petroleum engineering, geology, electromechanical engineering and foreign languages go on to earn the highest salaries.

At the institutional level, English is recognised as the language of research and its importance for internationalisation, study abroad, student mobility and academic partnerships is accepted. As internationalisation at the tertiary level is a relatively new practice in Colombia, most universities do not have entrenched, top-down English programmes that ensure students outside of the teaching or language faculties have access to the language. English language requirements and learning provision vary between institutions and faculties. Generally, those in teaching pre-service programmes or foreign language faculties have free access to English classes, while those on other courses often have to pay for this, if there are available places. To comply

⁴⁴ UNESCO Institute of Statistics, 2013

⁴⁵ ICEF Monitor. Colombia seeks the best path forward for its tertiary sector. 26 February, 2013.

⁴⁶ Siddique, A.H. Education in Colombia: Is There a Role for the Private Sector? Fair Observer. 14 January 2014

⁴⁷ ICEF Monitor. Colombia seeks the best path forward for its tertiary sector. 26 February, 2013

⁴⁸ British Council, 2014

with English language entry and exit requirements in higher education, students may enrol in private language schools alongside studies or during a dedicated break to improve their skills.^{49,50}

The SENA apprenticeship programme is in the process of creating a cohesive language strategy for its courses. SENA courses take into consideration industry requirements and are continually updated based on feedback from students, employers and industry leaders. As such, SENA students can take advantage of blended learning opportunities alongside dedicated online English modules. Separate courses in General English and English for Special Purposes may be available depending on the programme.

In many ways, the role of higher education in English is that of an incentiviser: higher education is seen by many as an opportunity and motivator for learning English. Graduates are expected to reach at least B1 level. While this is not always the case, private universities may be more stringent or demanding with regard to these requirements. In addition, English teaching at universities, while sometimes expensive, is generally better quality than in other areas of formal education as teacher training is better and the number of qualified teachers is higher.

Provision of private English language training

As with most private schools, private English training is expensive and is therefore only accessible for a small share of the population. The British Council estimates that around 581,000 people in Colombia are taking or have the potential to take private English classes, including face-to-face and blended courses. Classes generally cost US\$10 to 25 per hour.

Private English schools have proliferated, especially in urban areas. An increasing number of older students, including teenagers and adults, are enrolling in private English classes. This trend is not visible among school-age children, suggesting parents may consider language education in schools to be sufficient for younger children. This trend among older students and adults is a sign of increasing internationalisation, as these students study English for professional development or to gain international English qualifications. These students tend to fall into one of three categories: upper-secondary school graduates that have not yet been accepted on or pursued professional or university pathways; those that cannot yet afford higher education and are working and learning English during a 'gap year'; and those who are supplementing university studies but do not or cannot access university English courses. This last group contains adults who want to improve their skills either for their jobs or for postgraduate study.

While most urban and international employers prefer their employees to speak English, few require their staff to speak English on a regular basis. As such, corporate English programmes are fairly uncommon.

Most private English schools create and own their curriculums and programmes. These courses are not evaluated for quality assurance and are not regulated, meaning that there is a risk of being taught by unprepared instructors. Even in the private sector, many teachers remain below the B1 level mandated by the PFDCL. The MEN is working to create mechanisms for regulating the quality of these institutions. While quality is sometimes a concern, private ELT providers play an important role in ensuring that those with the drive and disposable income can learn English.

⁴⁹ Vazquez, A.M., N.P. Trejo Guzman and R. Roux. *Can ELT in Higher Education be Successful? The Current Status of ELT in Mexico. The Electronic Journal for English as a Second Language*, May 2012

⁵⁰ Granados Beltran, C. *Challenges of Bilingualism in Higher Education: The Experience of the Languages Department at the Universidad Central in Bogotá, Colombia. Gist Education and Learning Research Journal*, 2013

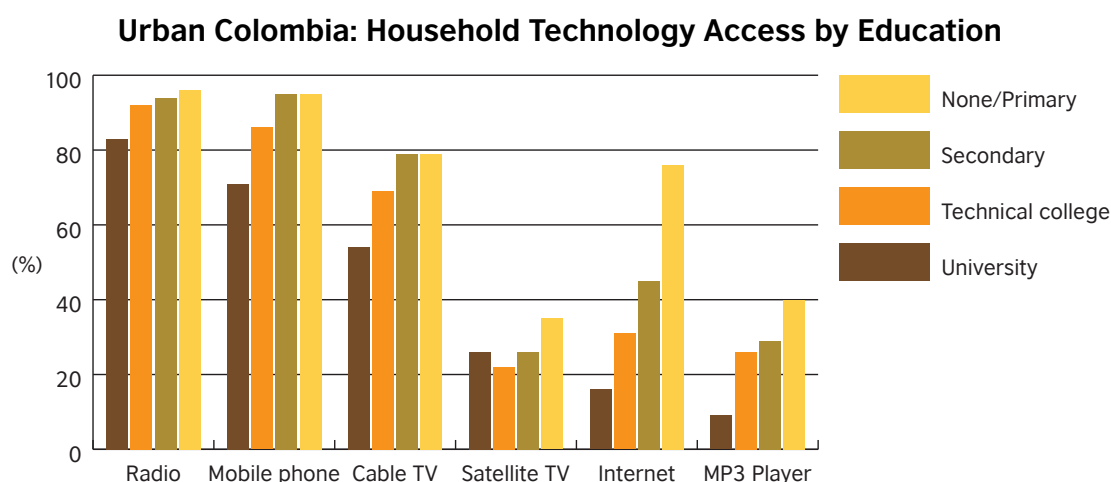
Self-access English language learning

Self-access learning encompasses private channels that offer blended and informal learning through radio, print and other media. The British Council estimates that of the three million self-access English learners in Colombia, most listen to English language radio programmes as a means of improving proficiency.

It is unclear whether the radio programmes students listen to are specifically for English language learning or if they are programmes in English that students use as a learning tool. Students also make good use of textbooks and ad-hoc online products to support their English language learning. Despite Colombia's high mobile penetration, mobile programmes are not particularly popular. As Colombia is the fourth-largest mobile market in Latin America, there may be significant potential in this area of ELT. Popular mobile platforms include Android and iOS: in 2013 to 2014, there were 18,472 Android and 17,860 iOS downloads of British Council English applications in Colombia, the most popular of which was the LearnEnglish series, which focuses on grammar as well as audio and video.⁵¹

In the past, many Colombians did not have access to the Internet or own laptops or smartphones, and popular films were largely dubbed in Spanish. However, there have been significant changes in recent years in access to technology and English media, including an increase in the number of Internet subscribers and social media users and increased access to the Internet via free access points, such as libraries. Today, Colombia is home to 4 million Internet subscribers who are active on social media.⁵²

An independent survey found that while radio and mobile penetration are high for university and technical college graduates, penetration is even greater for those without higher education.⁵³ Among this group, which has lower average income, radio may be a more affordable and accessible means of learning English than formal English classes.



Source: InterMedia, 2009

⁵¹ British Council, *Education Intelligence, Latin America Databank*, 2014

⁵² Euromonitor, 2014

⁵³ InterMedia AudienceScapes. *Urban Colombia Education*. Retrieved at: <http://www.audiencescapes.org/country-profiles/urban-colombia/communication-habits-demographic-group/education/education-179>

International English language evaluation

As international exams are often undertaken voluntarily by fee-paying students, scores may not be an accurate indicator of English proficiency among the overall population. However, they can still be used to highlight certain trends.

Students in Colombia study towards a range of English exams throughout their school and higher education careers, the most notable of which are the Test of English as a Foreign Language (TOEFL) and International English Language Testing System (IELTS), which are used to evaluate and standardise English language levels of students around the world. While not perfectly transferrable, IELTS and TOEFL scores can be roughly equated to the CEFR in order to measure the English levels of Colombian test takers.

TOEFL

The TOEFL is the measurement of English language levels most commonly accepted by universities around the world. It comprises four sections - reading, listening, speaking and writing - each providing a score between 0 and 30 and giving a total score of 0 to 120.

Reading	Listening	Speaking	Writing	Total
20	20	21	20	81

In December 2013, the average score for Colombian TOEFL examinees was 81, meaning that Colombian students are classified as 'intermediate' for reading and listening and 'fair' for speaking and writing.

IELTS

The IELTS exam is also widely accepted around the world for university entrance and is TOEFL's main competitor. The exam again comprises four sections - listening, reading, writing and speaking - and students can sit 'academic' or 'general training' versions of the test.

ACADEMIC				
Reading	Listening	Speaking	Writing	Total
6.5	6.3	6.4	5.8	6.3
GENERAL TRAINING				
Reading	Listening	Speaking	Writing	Total
5.7	5.7	6.0	5.7	5.8

Scores of 5 to 5.9 represent modest users with partial command of that language element, while scores of 6 to 6.9 represent competent users with a 'generally effective' command of the language.⁵⁴ As such, Colombian students' performance in the IELTS is 'modest' to 'competent' in 2013.

⁵⁴ IELTS, 2014

Comparative English language levels

The following table shows how these international standards relate to each other and to the CEFR.

COMPARATIVE ANALYSIS OF LANGUAGE TESTS		
CEFR (Common European Framework of Reference for Languages)	TOEFL iBT	IELTS Academic
C2	120	9
C2	110	8
C2	105	7.5
C1	100	7
C1	90	6.5
B2	84	6
B2	80	6
B2	71	5.5
B1	61	5
B1		Between 4.5 to 5
A2		Less than 4

Source: British Council, Education Intelligence, Latin America Databank 2014

Based on Colombians' IELTS and TOEFL results, English proficiency for those taking the exams is at a low to medium level, approximately equivalent to B2.

English learning motivations

In order to better understand acquisition and perceptions of English language, the British Council surveyed 1,000 Colombians, most of whom were aged 19 to 35. With this questionnaire we aimed to ascertain the occupations, income levels, interests and viewpoints of English learners and non-learners. By contrasting the positive and negative responses, we hoped to gain insight into the differences and similarities in opinions and the value placed on English language learning.

Survey respondents' demographics

The survey respondents were aged between 16 and 50, although 96 per cent were aged 19 to 35. Among this majority segment, the respondents with the largest proportions of English learners compared to non-learners were aged 27 to 28 and 33. Teenagers, in general, had a higher proportion of non-learners.

Age	No	English	% of total
16	67%	33%	1%
17	56%	44%	1%
18	59%	41%	2%
19	49%	51%	5%
20	56%	44%	4%
21	51%	49%	5%
22	48%	52%	7%
23	48%	52%	6%
24	52%	48%	7%
25	49%	51%	5%
26	38%	62%	4%
27	43%	57%	5%
28	45%	55%	5%
29	59%	41%	7%
30	52%	48%	7%
31	60%	40%	5%
32	49%	51%	7%
33	40%	60%	5%
34	50%	50%	6%
35	50%	50%	6%
37	50%	50%	0%
39	0%	100%	0%
44	0%	100%	0%
45	50%	50%	0%
47	100%	0%	0%
48	0%	100%	0%
50	100%	0%	0%
Total	50%	50%	100%

Gender	No	English	Total
Female	51%	49%	53%
Male	49%	51%	47%
Total	50%	50%	100%

Source: British Council, Education Intelligence, Latin America Databank 2014

Of the 1,000 respondents, 53 per cent were female, just under half of whom had learned some English. Conversely, just over half (51%) of male respondents had taken English lessons.

Proportion of English learners by state

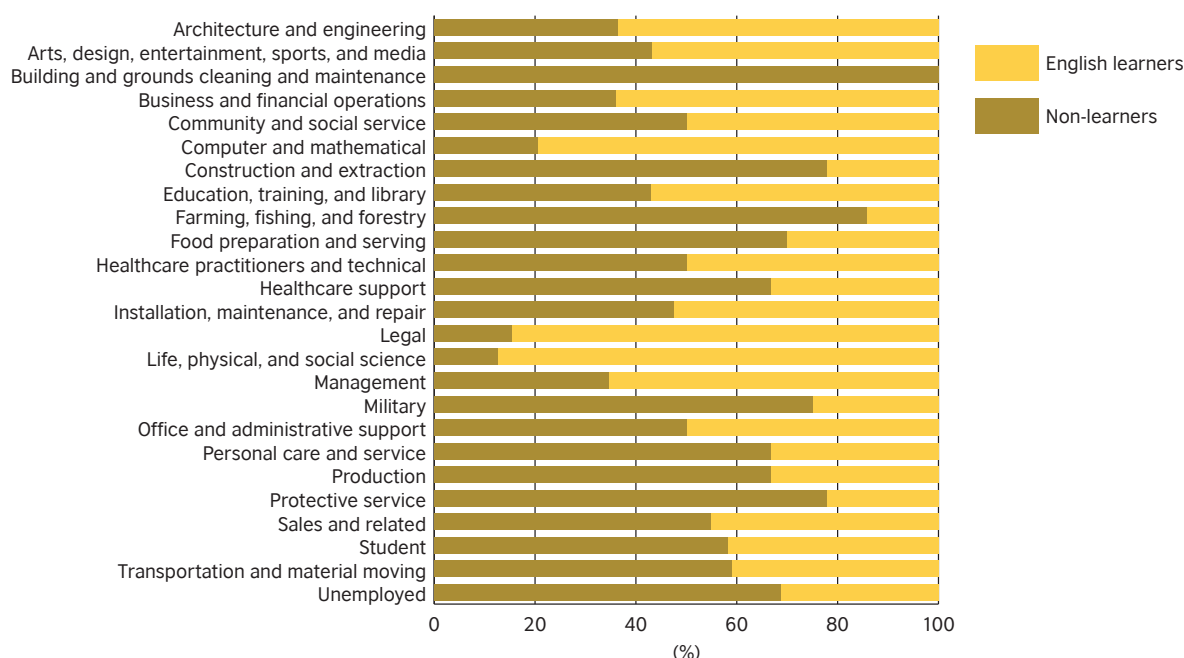
This chart shows the proportion of respondents in Phase 1 that had studied or were studying English, broken down by their state of residence. It is worth noting that in a number of departments there were few respondents, meaning that figures for these areas are less likely to be representative of the regional population. These low-coverage departments are Caqueta, Casanare, Guainia, Guaviare, Choco, La Guajira, Putumayo, San Andres y Providencia and Vichada.

Department	Per cent of respondents that have learned English
San Andrés y Providencia	100%
Vichada	100%
Caquetá	80%
Casanare	80%
Risaralda	68%
Caldas	67%
La Guajira	60%
Distrito Capital	57%
Cauca	56%
Antioquia	55%
Córdoba	55%
Cesar	54%
Norte de Santander	52%
Guaviare	50%
Valle del Cauca	50%
Tolima	48%
Santander	48%
Magdalena	48%
Bolívar	46%
Atlántico	45%
Boyacá	43%
Meta	42%
Cundinamarca	40%
Huila	40%
Chocó	33%
Quindío	30%
Nariño	29%
Sucre	20%
Arauca	0%
Guainía	0%
Putumayo	0%

Source: British Council, Education Intelligence, Latin America Databank 2014

Occupation and English language learning

Respondents were asked to identify their occupation from a list of industries. This selection was then cross-referenced with respondents' experiences of English learning.



Source: British Council, Education Intelligence, Latin America Databank 2014

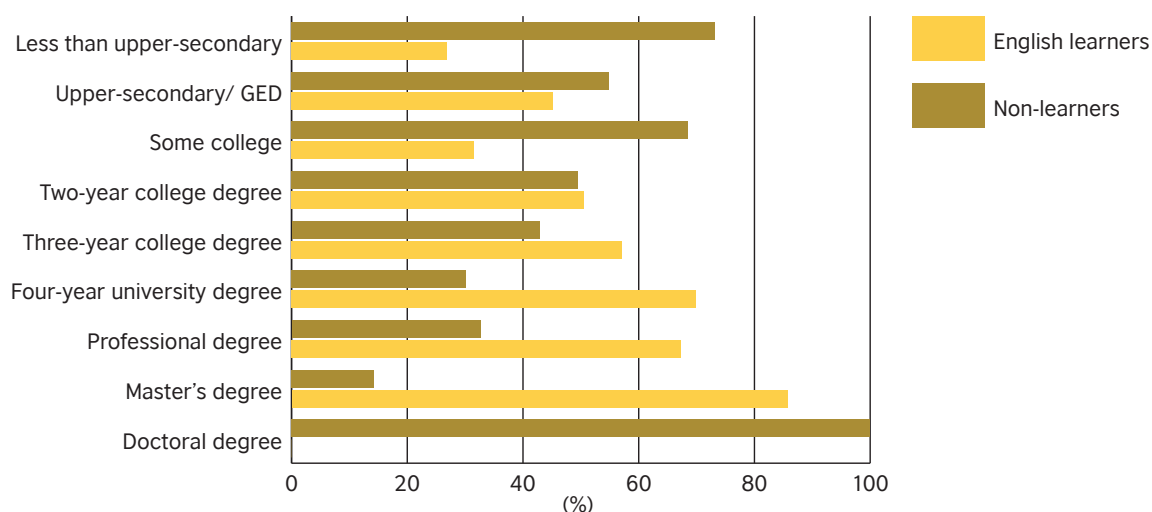
Occupations with the highest proportion of English language learners included life, physical and social science (88%), legal (85%), computer and mathematical (79%), management (65%), architecture and engineering (64%) and business and financial operations (64%). Other areas in which respondents were more likely to have learned some English included arts, design, entertainment, sports and media (57%), education, training and library (57%) and installation, maintenance and repair (53%).

The industry areas with a higher proportion of non-learners included building and grounds cleaning and maintenance (0% had learned English), farming, fishing and forestry (14%), protective services (22%), construction and extraction (22%) and military (25%).

There was a relatively even split between English learners and non-learners in industries such as community and social service (50% English learners), health-care practitioners and technical (50%), office and administrative support (50%) and sales and related (45%). Overall, 42 per cent of students and 31 per cent of the unemployed indicated they had undergone some English training.

For the most part, the industries with the highest proportions of English learners are those that require academic certifications and qualifications; careers in management, education, training and library as well as legal require a high level of education, as do careers in business and financial operations and architecture and engineering. Conversely, the industries that appear not to require English language competence are more labour-intensive.

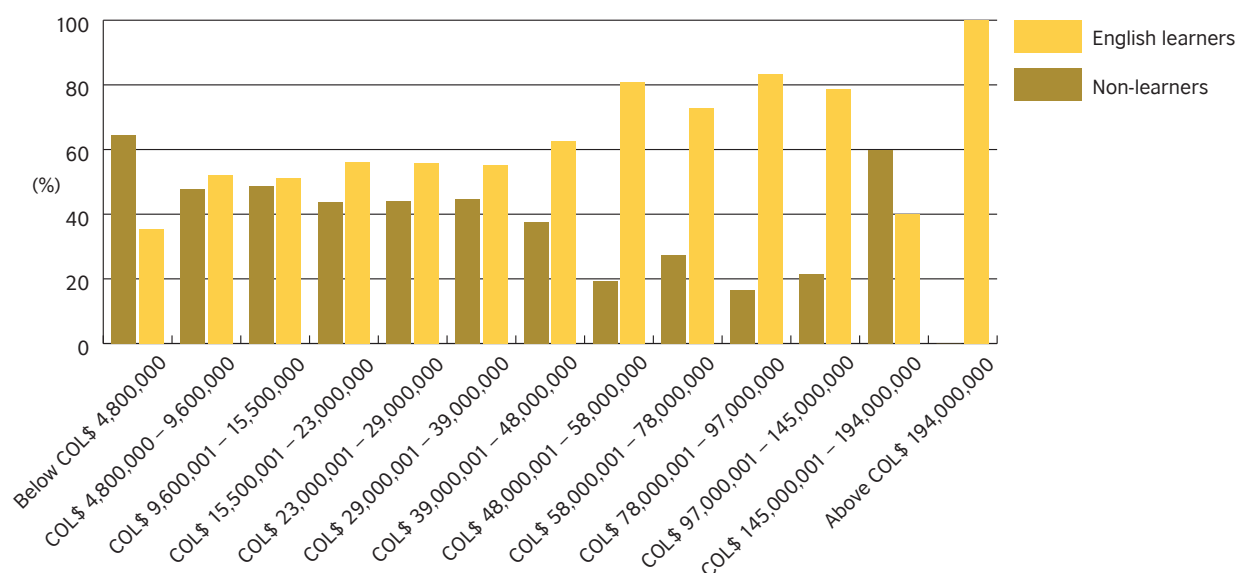
Level of education and English language learning



Source: British Council, Education Intelligence, Latin America Databank 2014

For the most part, respondents that had less than an upper-secondary education had not learned English: just 27 per cent of these respondents were English learners. The only other education segment that had a significantly higher proportion of non-learners was 'some college'. Among those that had completed upper-secondary school or held two- or three-year college degrees, there were fairly equal numbers of learners and non-learners. Among those with a higher level of education, the share of English learners increased significantly: 70 per cent of those with four-year university degrees were English learners, as were 67 per cent of those with professional degrees and 86 per cent of those with master's degrees. The number of respondents with doctoral degrees was too low to give statistical significance.

Household income and English language learning



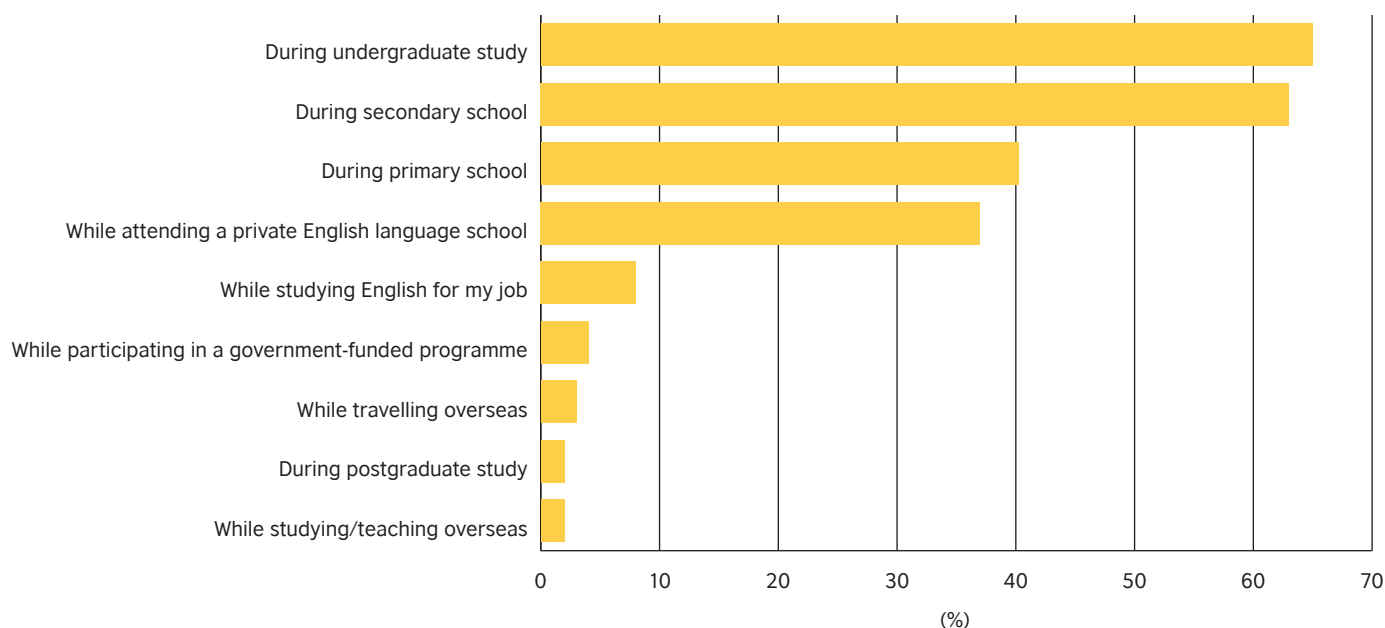
Source: British Council, Education Intelligence, Latin America Databank 2014

Among lower income levels it is much more likely that respondents are non-learners: just 35 per cent of those with household income less than COL\$4,800,000 had learned English. This proportion generally increases with income, indicating a positive relationship between household income and participation in English language learning. There were not enough respondents in the highest income bracket to give statistical significance.

Motivations for learning English

Of the 1,000 respondents, 50 per cent indicated that they had learned or were learning English. In order to better understand their experiences, we asked these respondents when and why they had learned the language. We then asked them to evaluate their reading, writing and speaking skills.

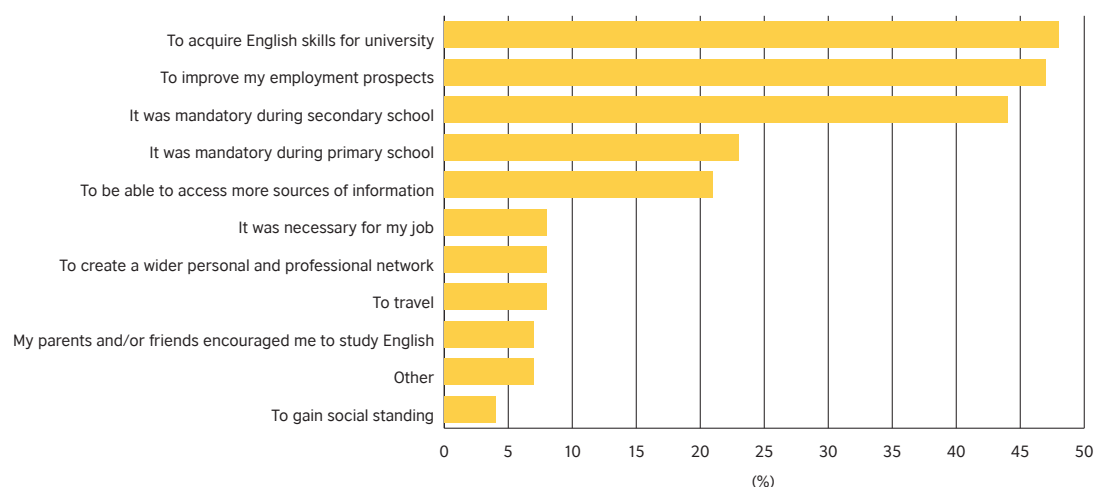
When did you study English



Source: British Council, Education Intelligence, Latin America Databank 2014

As respondents may have studied English at various times, they could select more than one answer. Of the 500 respondents, the largest share had learned during undergraduate study (65%), while 63 per cent had learned at secondary school. Less than half of respondents said they had learned in primary school (40%) or at a private English language schools (37%). Very few people indicated that they had learned through a government-funded programme (4%), during travel or study or teaching abroad (3% and 2%, respectively) or during postgraduate study (2%).

Why did you study English?

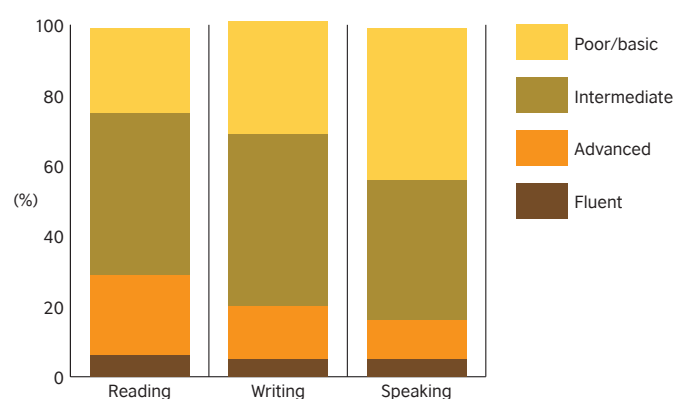


Source: British Council, Education Intelligence, Latin America Databank 2014

When asked why they had chosen to study English, 48 per cent of respondents said they had needed English skills for university. While it is unclear whether this refers to entry or exit requirements or both, it is likely that it refers to English exit requirements at private universities in particular, where certification of English language attainment is necessary for graduation. Respondents also stated the importance of English for improving employment prospects (47%) and for secondary school (44%). There was relatively little weight given to English as necessary for an existing job (8%), to create wider networks (8%), to travel (8%), the encouragement of family and friends (7%), other unlisted reasons (7%) and to gain social standing (4%).

English proficiency

We asked respondents to evaluate their levels of English, choosing from Poor/basic, Intermediate, Advanced and Fluent.



Source: British Council, Education Intelligence, Latin America Databank 2014

While this evaluation was subjective, the majority of respondents did not consider themselves advanced speakers. Participants were most comfortable with their reading skills, with almost 30 per cent classing themselves as Fluent or Advanced. Respondents were least confident in their speaking skills: only 16 per cent classed themselves as Fluent or Advanced English speakers. Overall, 40 per cent reported that their speaking skills were Poor/basic, compared to 24 per cent that rated their reading skills as basic. Interestingly, the percentage of respondents that rated themselves as fluent was constant for all three skill areas (5 to 6%), potentially indicating a small sub-group of confident respondents that are akin to native speakers.

Next, we consider self-reported skills broken down by industry.

RATIO OF SELF-ASSESSED HIGHER ENGLISH PROFICIENCY TO LOWER ENGLISH PROFICIENCY			
	Reading	Writing	Speaking
Architecture and engineering	0.40	0.32	0.26
Arts, design, entertainment, sports, and media	0.74	0.38	0.27
Business and financial operations	0.52	0.39	0.33
Community and social service	0.17	0.17	0.17
Computer and mathematical	0.29	0.19	0.11
Construction and extraction	1.00	0.00	0.00
Education, training, and library	0.85	0.60	0.50
Farming, fishing and forestry	0.00	0.00	0.00
Food preparation and serving	0.50	0.00	0.00
Health-care practitioners and technical	0.20	0.09	0.04
Health-care support	0.00	0.50	0.50
Installation, maintenance, and repair	0.31	0.17	0.17
Legal	1.20	0.38	0.83
Life, physical, and social science	2.50	0.17	0.00
Management	0.31	0.16	0.12
Military	0.00	0.00	0.00
Office and administrative support	0.16	0.13	0.13
Personal care and service	0.33	0.00	0.33
Production	0.25	0.11	0.11
Protective service	0.00	0.00	0.00
Sales and related	0.74	0.38	0.32
Student	0.51	0.30	0.19
Transportation and material moving	0.00	0.00	0.00
Unemployed	0.32	0.23	0.19
	0.41	0.24	0.20

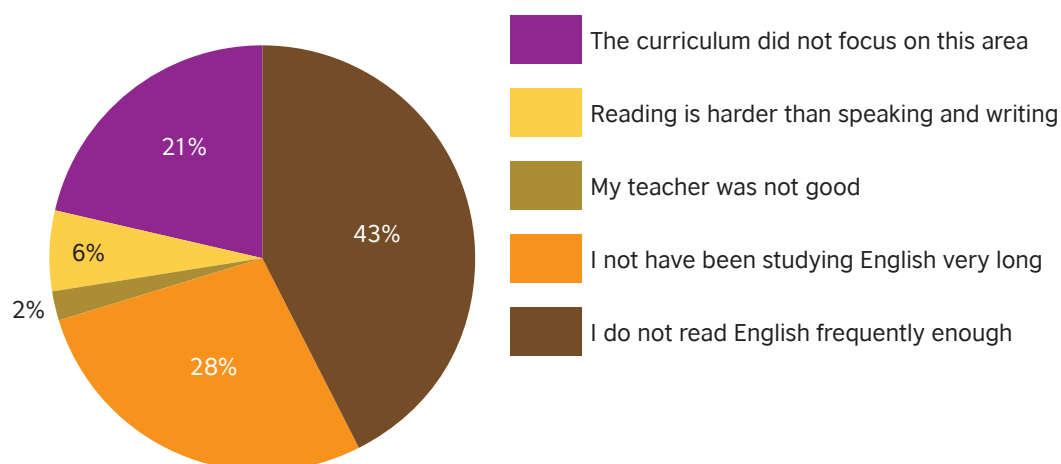
Source: British Council, Education Intelligence, Latin America Databank 2014

The only occupation in which all respondents stated that they had high proficiency in all English skills was education, training and library. A number of respondents in industries including life, physical and social science, legal, construction and extraction (which does not contain a statistically significant sample), sales and related, and arts, design, entertainment, sports and media felt confident in their reading skills but only those in legal and health-care support also felt they had high proficiency in writing or speaking.

Education, training and library, legal and health-care support are industries that often require interaction with English speakers, in addition to more advanced levels of education. It is surprising that respondents in other popular occupations, such as management and architecture and engineering, assessed their English skills as being so weak.

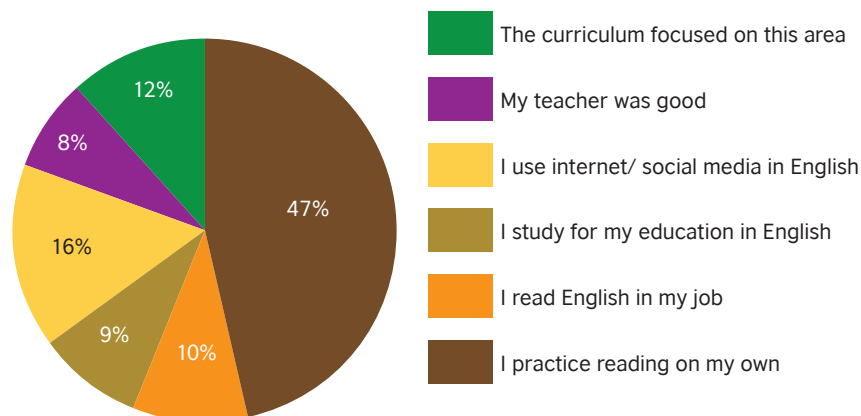
Reading skills in English

We asked respondents who evaluated their reading skills as Poor/basic or Intermediate why they felt their skills were lacking.



Source: British Council, Education Intelligence, Latin America Databank 2014

The largest share of respondents (43%) felt that the responsibility for their weak reading skills was their own, citing that they did not read English frequently enough. The two other main reasons were that they had not been studying English for very long (28%) and that the curriculum did not focus on reading (21%). Just two per cent of respondents indicated that their teacher was not satisfactory.



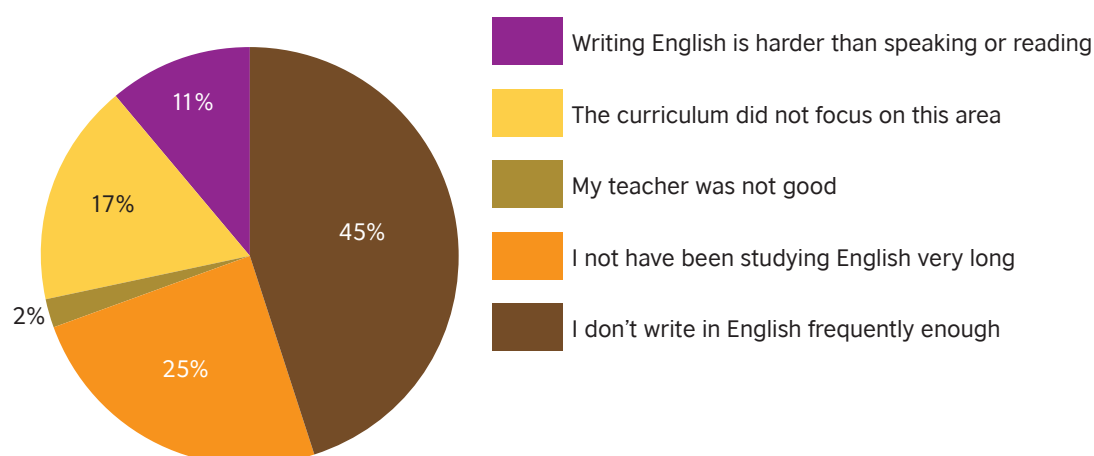
Source: British Council, Education Intelligence, Latin America Databank 2014

We then asked those who were confident in their reading skills (Advanced and Fluent) why they felt their skills were so good. The largest share, by a significant margin, attributed this to reading English proactively (47%). Other reasons given were the use of Internet and social media (16%), the focus of the curriculum on reading (12%) and time spent reading at work (10%). Respondents were least likely to attribute their skills to a good teacher (8%) or studying in English for their education (9%).

Overall, respondents felt that their reading skills were largely a product of their own efforts as opposed to the strengths or weaknesses of their teachers or education. It is interesting to note that a significant proportion of less confident readers (Poor/basic or Intermediate) stated that their curriculum did not focus enough on reading, while this was not a major factor for those with strong reading skills. Among confident readers, the Internet and social media may play such a large role owing to the large number and range of English language websites and programmes as well as digitally published research and news.

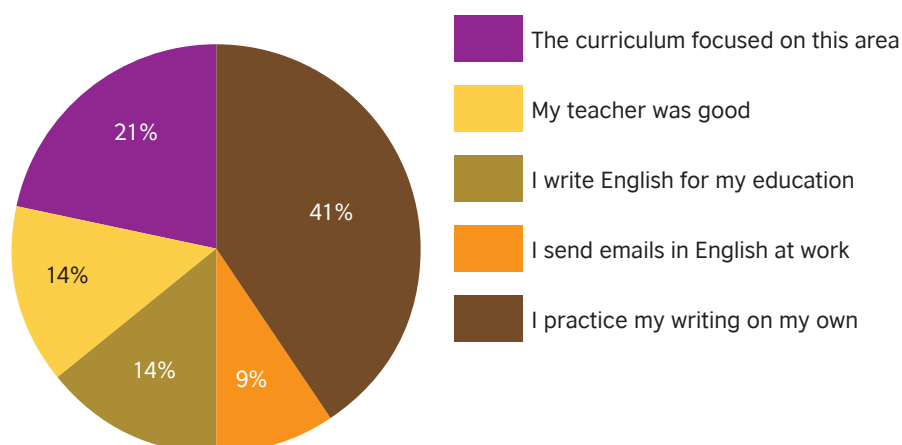
Writing skills in English

We asked respondents who evaluated their writing skills as Poor/basic or Intermediate why they felt their skills were lacking.



Source: British Council, Education Intelligence, Latin America Databank 2014

As with weak reading skills, the majority of respondents felt that this was attributable to a lack of practice: 45 per cent said that they did not write English frequently enough. The other major reason was that they had not been studying English long enough (25%), while a significant share (17%) indicated that the curriculum did not focus on writing. One in ten felt that writing is harder than reading or speaking, and just two per cent placed the responsibility on their teachers.

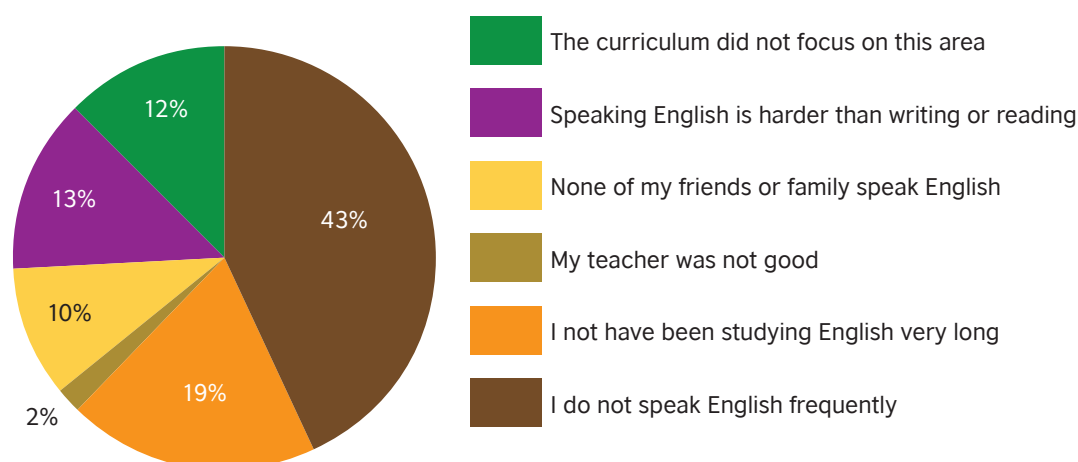


Source: British Council, Education Intelligence, Latin America Databank 2014

Again, those who were confident about their skills attributed this to their own efforts and practice in writing English (41%). Other reasons were that the curriculum focused on this area (21%), the teacher was good (14%) and the need to write in English for education (14%). Only 9 per cent attributed their skills to using English at work for emails. Again, many respondents felt that their skill in English writing or lack thereof was a direct product of their own efforts. While 17 per cent of those with weaker writing skills blamed this on the curriculum, 21 per cent of those with strong skills said this was due to the curriculum. This may indicate a lack of cohesive standards and differences in provision among different English programmes.

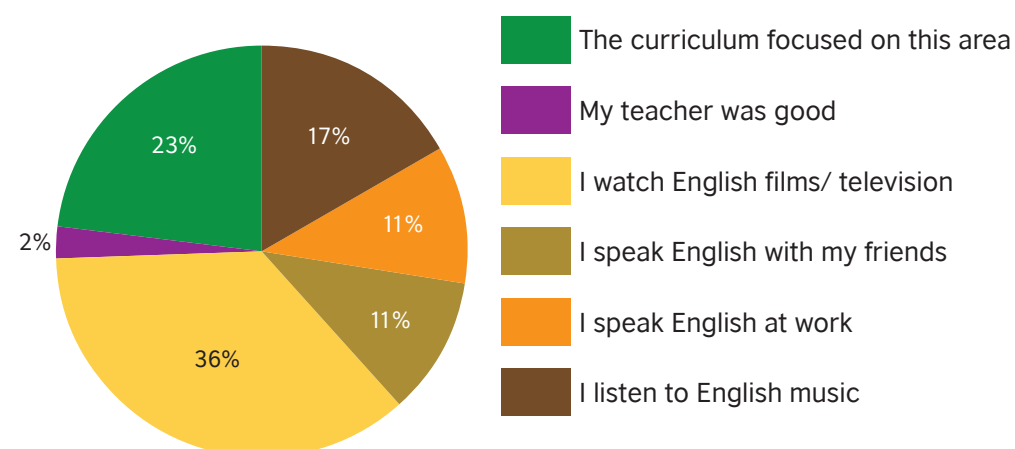
Speaking skills in English

We asked respondents to assess the reason for their weak skills in speaking in the same way as for reading and writing.



Source: British Council, Education Intelligence, Latin America Databank 2014

The largest share of respondents attributed their poor speaking skills to a lack of practice (43%). A further large share of participants said they had not been learning English long enough (19%), while more than one in ten felt that speaking was harder than writing or reading English (13%) and 12 per cent attributed this to the curriculum not focusing on speaking (12%). Just two per cent stated that their teachers were not good.



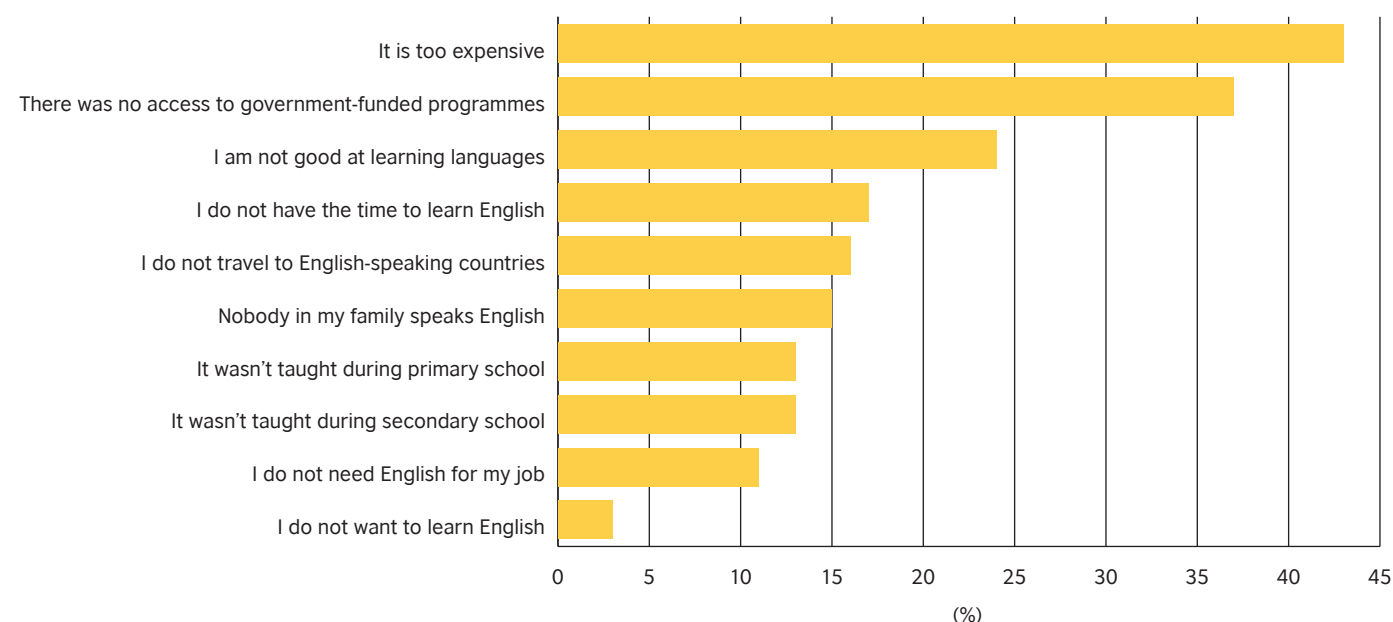
Source: British Council, Education Intelligence, Latin America Databank 2014

A large share of those that felt confident in their English speaking (Advanced and Fluent) said that it was due to watching English language films and television (36%), while 23 per cent attributed it to the curriculum and 17 per cent, to listening to music with English lyrics. Only two per cent credited their teachers for their strong English speaking skills. As such, those that felt most comfortable with their speaking skills did so because of their interactions with popular media and their school curriculums.

Barriers to studying English

We asked the 500 respondents who said they had not learned English what their motivations were and what could motivate them to study English in the future.

Why haven't you learned English?

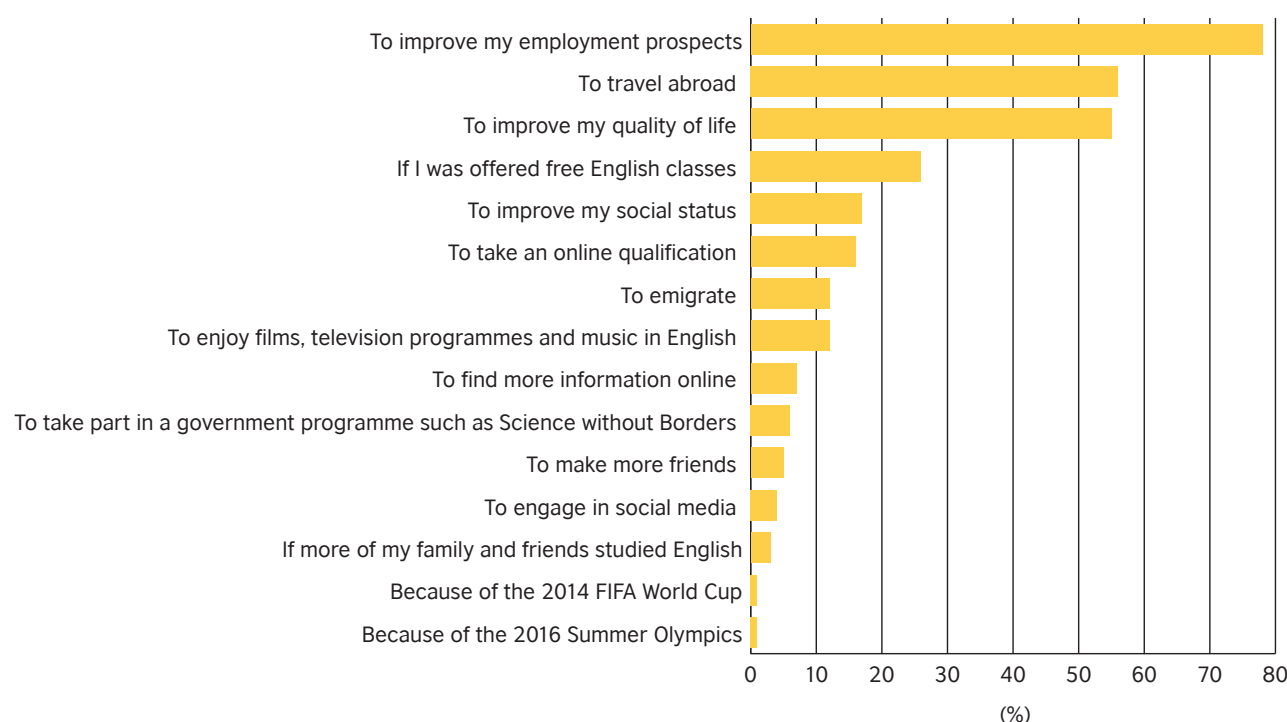


Source: British Council, Education Intelligence, Latin America Databank 2014

Survey participants could choose multiple answers. The largest shares of respondents stated that the cost (43%) and the lack of access to government-funded programmes (37%) were the major barriers to English language learning. Other responses were less decisive and included not being good at learning languages (24%), not having time to learn English (17%) and not travelling to English-speaking countries (16%). Just three per cent of respondents stated that they did not want to learn English.

It is clear from the low percentage of respondents that said they did not want to learn English that interest in English is strong but is being hampered by the high cost of language learning and a lack of access to affordable or quality programmes. More than one in three (13%) non-learners did not have access to English during basic education - unlike for most English learners. These respondents may come from either areas without English provision or an older demographic group.

What could motivate you to start learning English?



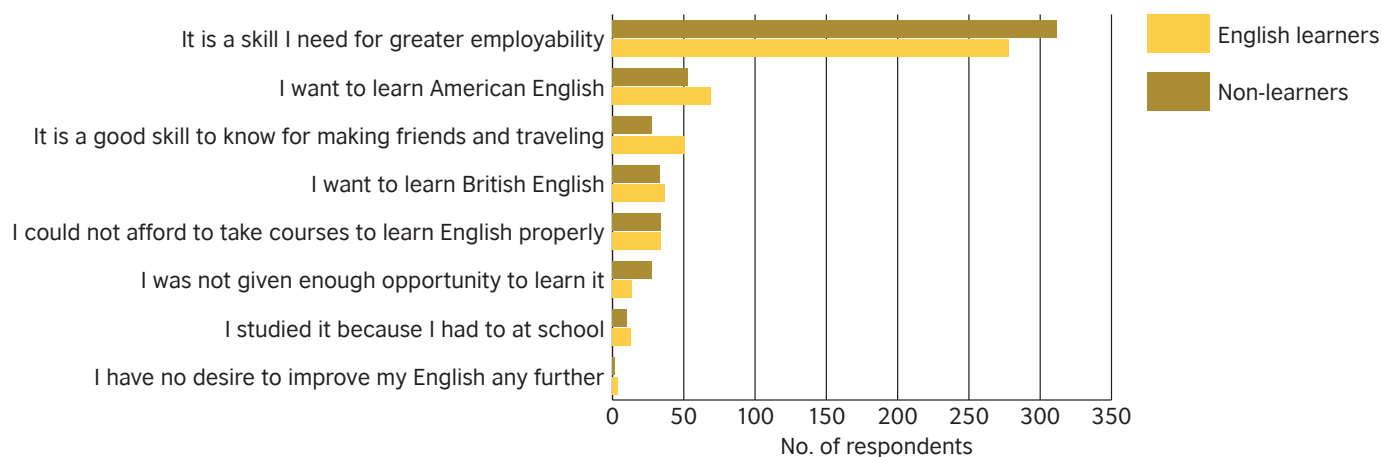
Source: British Council, Education Intelligence, Latin America Databank 2014

Respondents indicated overwhelmingly that the strongest reason to learn English would be to improve employment prospects (78%). Further large shares would study English to improve their quality of life (55%) and allow them to travel abroad (56%). Less popular but still significant reasons included if English classes were offered for free (26%), to improve social status (17%) and to take an online qualification (16%). Relatively insignificant motivations related to friends and family also speaking the language (3%) and international events such as the 2014 FIFA World Cup and 2016 Summer Olympics (1% each).

While the majority of respondents stated that cost was the biggest barrier to learning English, only a quarter of felt that free courses would prompt them to take classes. Thus, while cost is a major barrier, it is clear that the relationship between English and better quality of life and employment is a much stronger driver to acquire the language.

Views on learning English

All respondents were asked to reflect on the value they placed on learning English. Respondents could only select the view they most identified with.

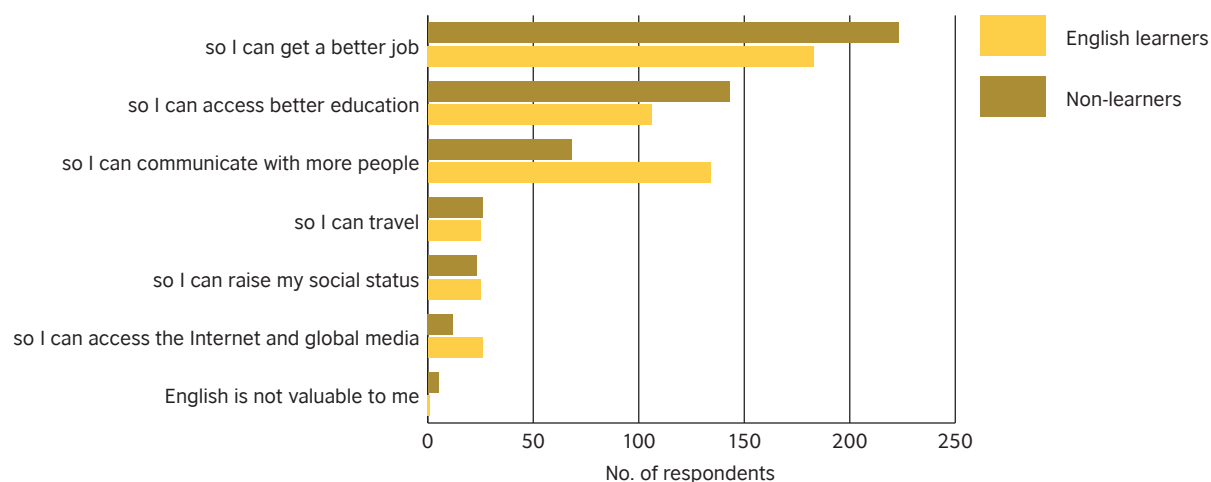


Source: British Council, Education Intelligence, Latin America Databank 2014

The sentiments of non-learners largely match those of English learners: the largest share of each group felt that English was a necessary skill for employability. Both groups also felt a strong desire to learn American English (11 % and 14%). Travelling and making friends was more important for English learners (10%) than non-leaners (6%), while the feeling that English learning is unaffordable (7%) and desire to learn British English (7%) were the same for both groups. Overall, six per cent of non-leaners prioritised the lack of opportunity for learning English (compared to 3% of English learners) and only two out of 500 non-learners said they had no desire to improve their English skills (compared to 1% of English learners).

Value placed on learning English

All respondents were asked to reflect on the value they personally place on learning English; each respondent could only select the one view they most identified with.



Source: British Council, Education Intelligence, Latin America Databank 2014

As with their views on English, non-learners placed the most value on English as a skill for better employability (45%). They also placed some value on the relationship between English and access to better education (29%) as well as communication with a broader set of people (14%). While English learners also felt that English was valuable as a tool for better employment (37%) and education (21%), they were more likely than non-learners to value it as a communication tool (27%). This may indicate that English proficiency opens learners up to the additional benefits of global communication. It may also reflect the fact that the English learners who participated in the survey had generally already attained a higher level of education.

Both learners and non-learners placed little to no value on the relationship between English and social status (5%), travel (5%) and access to the Internet and global media (5% for learners, 2% for non-learners). While one English learner stated that English had no value (0%), five non-learners shared this sentiment (1%).

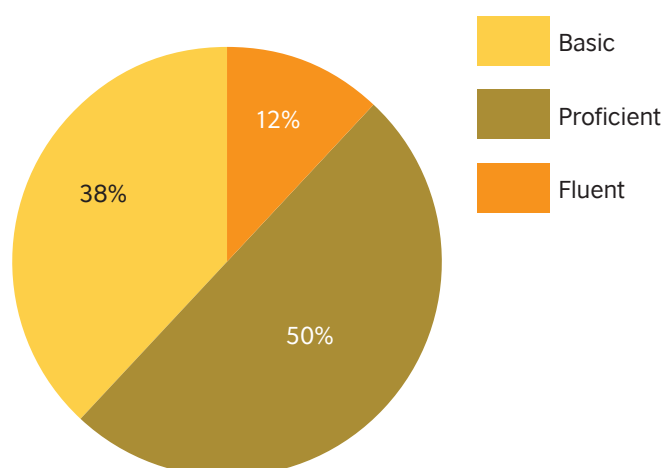
From our survey of views and values, the main patterns are that the link between English and better employability is very strong in the minds of Colombians and virtually no respondents have no desire to learn or improve their English. This trend supports evidence that English is associated with better job opportunities, better education and a higher standard of living. While desire for English is confirmed, this does not necessarily equate to demand, which is the result of additional factors such as motivation and means.

Employer demand for English

We surveyed 78 employers from different industries to better understand the relationship between employers, employment and English language acquisition.

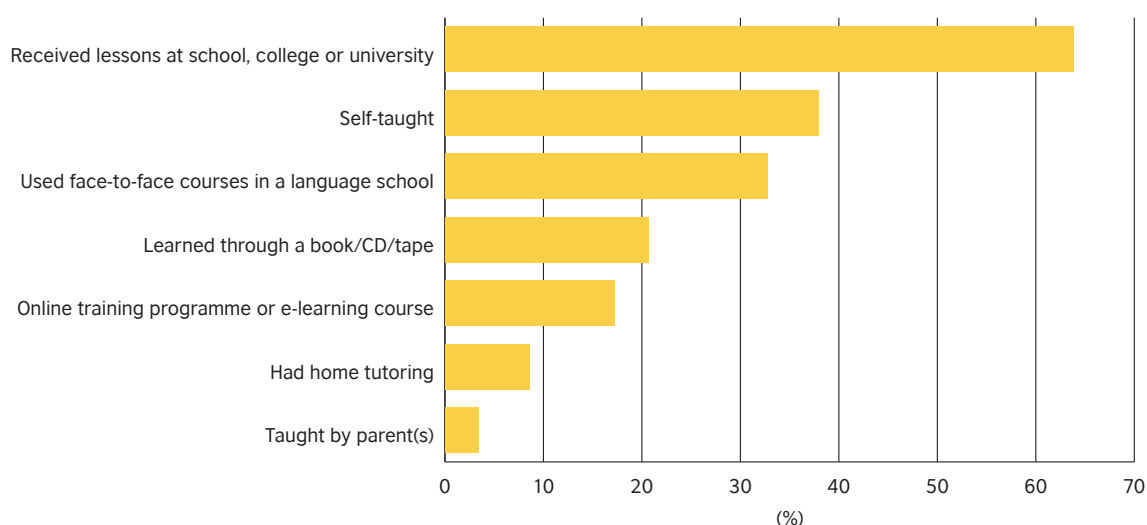
Management profile

The individuals who participated in the survey were employed at the managerial or executive level, meaning that they had attained high employment status that others often aspire to. Of these respondents, 81 per cent were a managing director or were employed in general management or human resources.



Source: British Council, Education Intelligence, Latin America Databank 2014

The respondents were all native Spanish speakers, but 74 per cent stated that they were able to speak English. Most of these English speakers reported medium proficiency (50%), while over a third (38%) stated that their skills were basic.



Source: British Council, Education Intelligence, Latin America Databank 2014

The majority of these high-achieving Colombians had learned English in school, college or university (64%); however, many were self-taught (38%), used language schools (33%), learned using media (21%) or learned online (17%).

Of the minority of management-level respondents that did not speak English, all stated that they would like to learn in the future.

Employer analysis

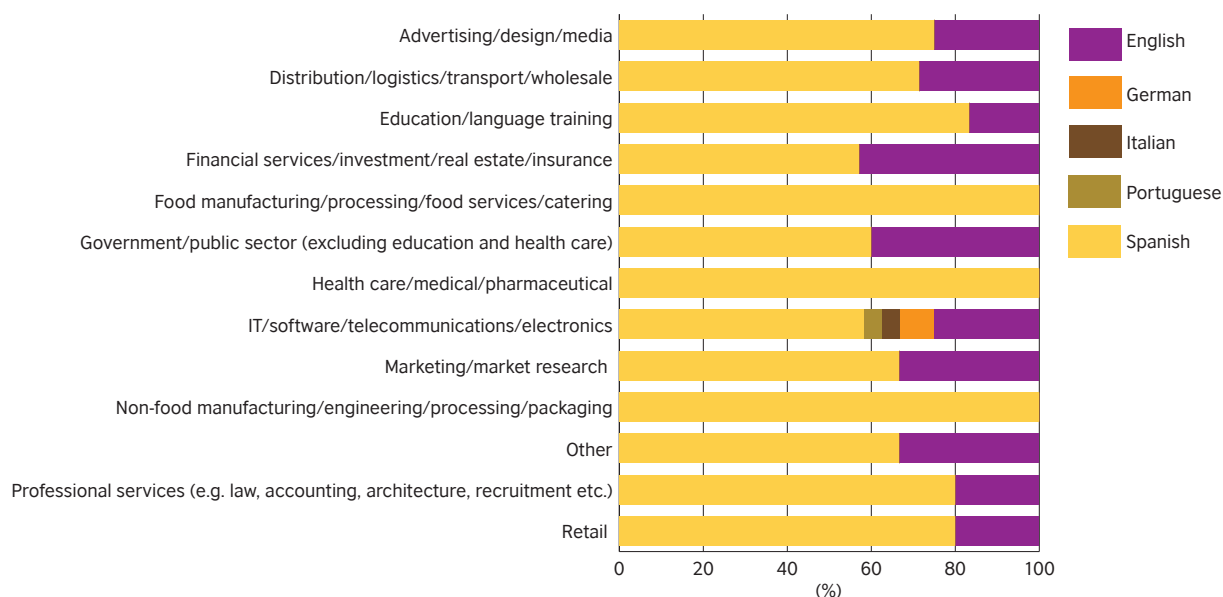
The companies represented in the survey were located predominantly in Bogota (63%), but there was also representation from other major cities, including Cali (9%), Medellin (8%), Ibagu  (3%), Bucaramanga (3%), Barranquilla (3%) and Cartagena (1%). Just one per cent of respondents were located in small towns. The companies varied in size: 58 per cent of respondents' firms employed fewer than 50 people, while 13 per cent employed between 50 and 99 and just one per cent represented companies with more than 1,000 employees.

Professional services (e.g. law, accounting, architecture, recruitment etc.)	18
IT/software/telecommunications/electronics	15
Advertising/design/media	10
Distribution/logistics/transport/wholesale	6
Education/language training	5
Retail	5
Financial services/investment/real estate/insurance	4
Non-food manufacturing/engineering/processing/packaging	4
Government/public sector (excluding education & healthcare)	3
Other, please state	3
Marketing/market research	2
Healthcare/medical/pharmaceutical	2
Food manufacturing/processing/food services/catering	1

Source: British Council, Education Intelligence, Latin America Databank 2014

The employers largely represented firms in professional services (23%), IT, software, telecommunications and electronics (19%) and advertising, design and media (13%), although a wide range of industries were represented overall.

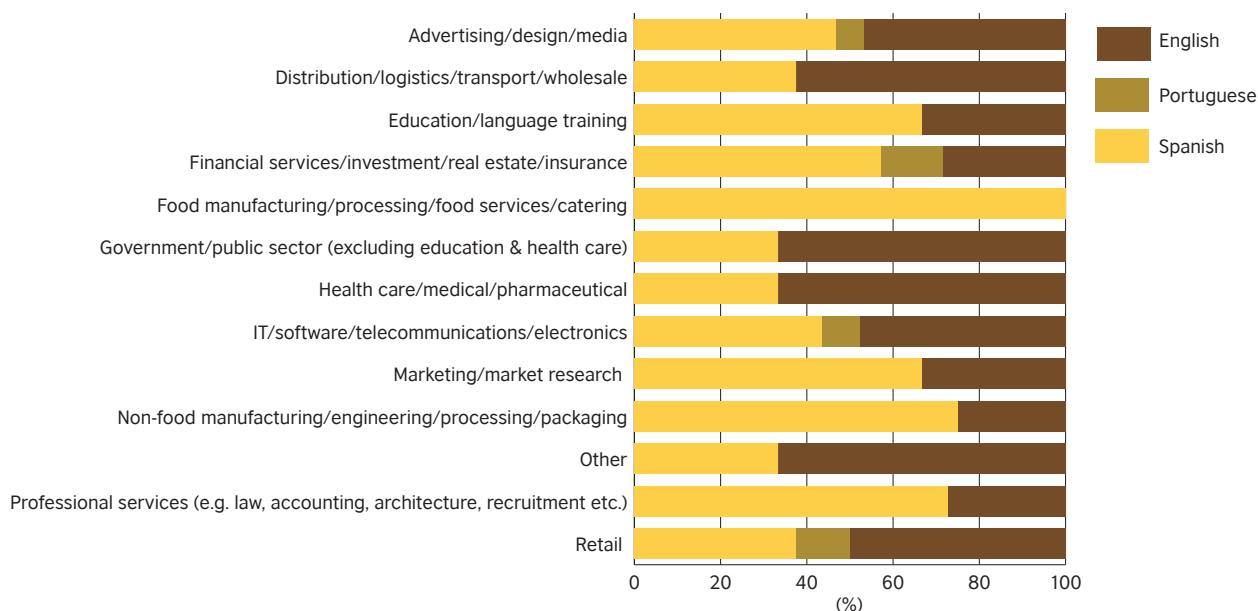
Languages used internally



Source: British Council, Education Intelligence, Latin America Databank 2014

To better understand the role of English in industry in Colombia, we asked survey respondents what language was generally used internally in their company. Industries where a relatively high proportion of companies spoke English internally included financial services, investment and real estate, government and public sector, marketing and market research, distribution, logistics, transport and wholesale, and advertising, design and media.

Languages used externally

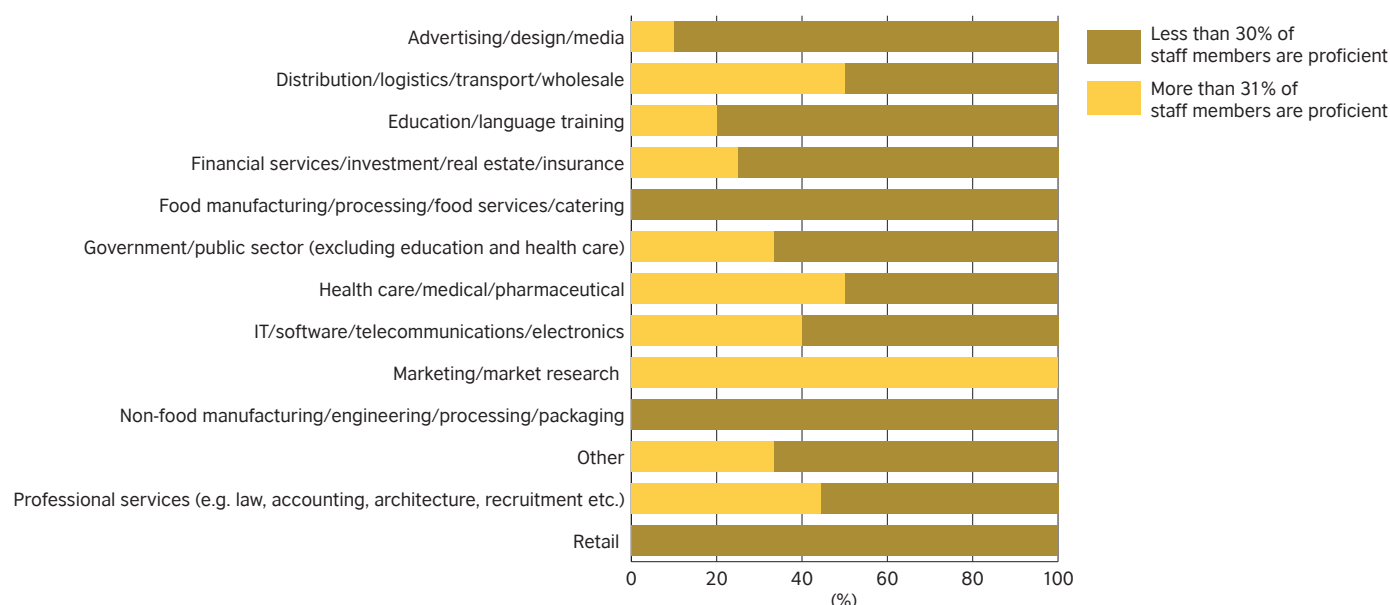


Source: British Council, Education Intelligence, Latin America Databank 2014

The number of companies that used English externally was much higher than the number that used it internally. The industries that were more likely to use English externally included health care, medical and pharmaceutical, government and public sector, distribution, logistics, transport and wholesale, retail, advertising, design and media, and IT, software and telecommunications.

These industries tend to be either directly involved in the global economy, such as government and wholesale, or customer facing, such as health care, medical and pharmaceutical and retail. For these companies, English is a mechanism for communicating with clients and generating additional business. It is worth noting, however, that only those in key externally facing roles are required to have English language capabilities.

Percentage of employees proficient in English



Source: British Council, Education Intelligence, Latin America Databank 2014

The industries that employ a higher proportion of staff with good English proficiency include marketing and market research, distribution, logistics and transport, health care, medical and pharmaceutical, and professional services. In these industries, English is necessary not only for front-office staff but also for those in more operational roles; for example, in market research roles, English skills may allow beneficial access to international research and contacts.

Top industries that offer English training and development

Professional services (e.g. law, accounting, architecture, recruitment etc.)	27%
Advertising/design/media	15%
IT/software/telecommunications/electronics	12%
Education/language training	12%
Distribution/logistics/transport/wholesale	12%

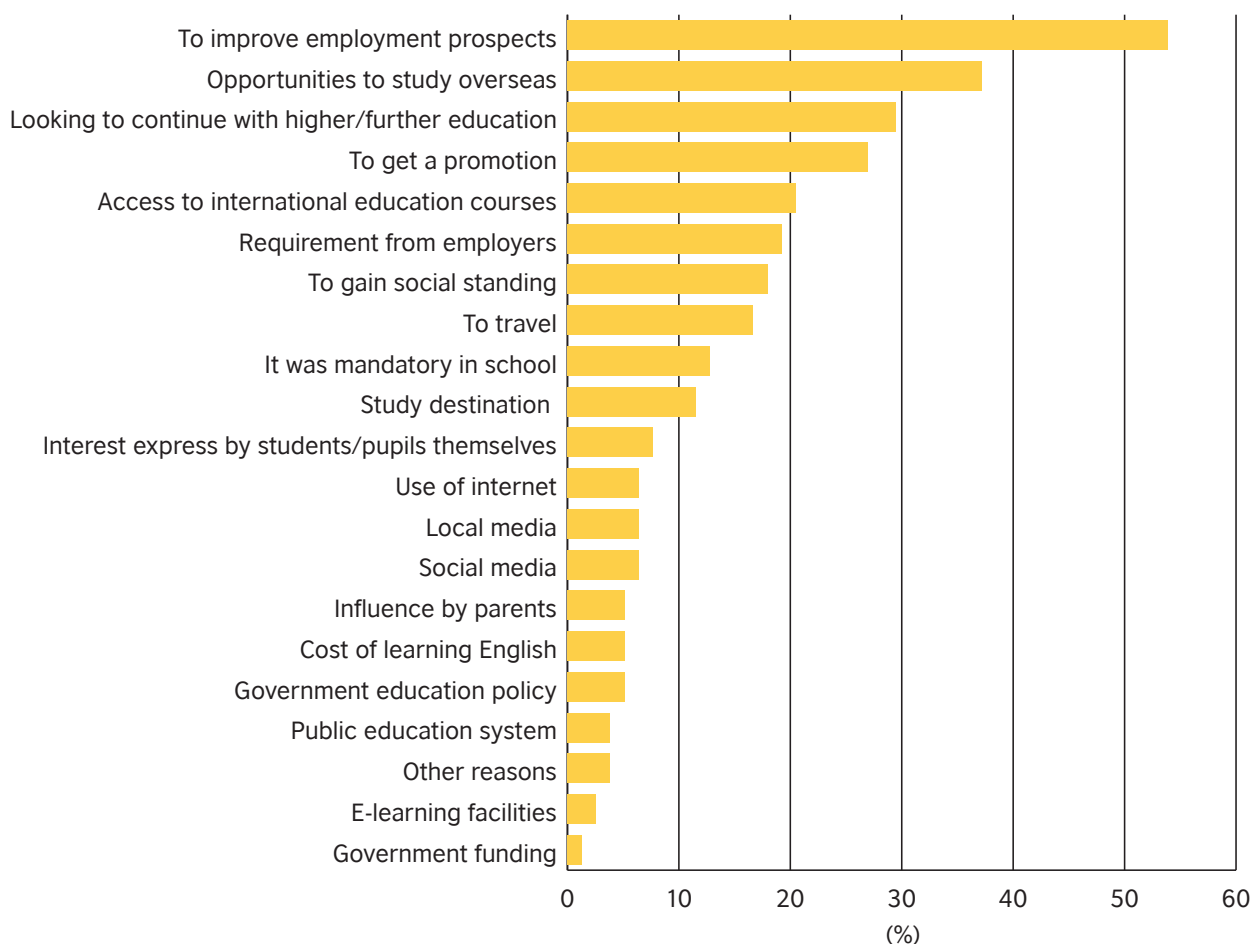
Source: British Council, Education Intelligence, Latin America Databank 2014

We asked respondents if their companies offered in-house professional development or training in the English language. Industries that are most likely to offer professional development in this area include professional services (27%), advertising, design and media (15%), IT, software, telecommunications and electronics (12%), education and language training (12%) and distribution, logistics, transport and wholesale (12%). Most in-house training is administered through online learning, in-house English classes and partnerships with external private companies, including universities.

It is interesting to note that just 12 per cent of companies in education and language training offer English language training for their staff and that English is not widely spoken internally or externally or by a large proportion of staff in this sector.

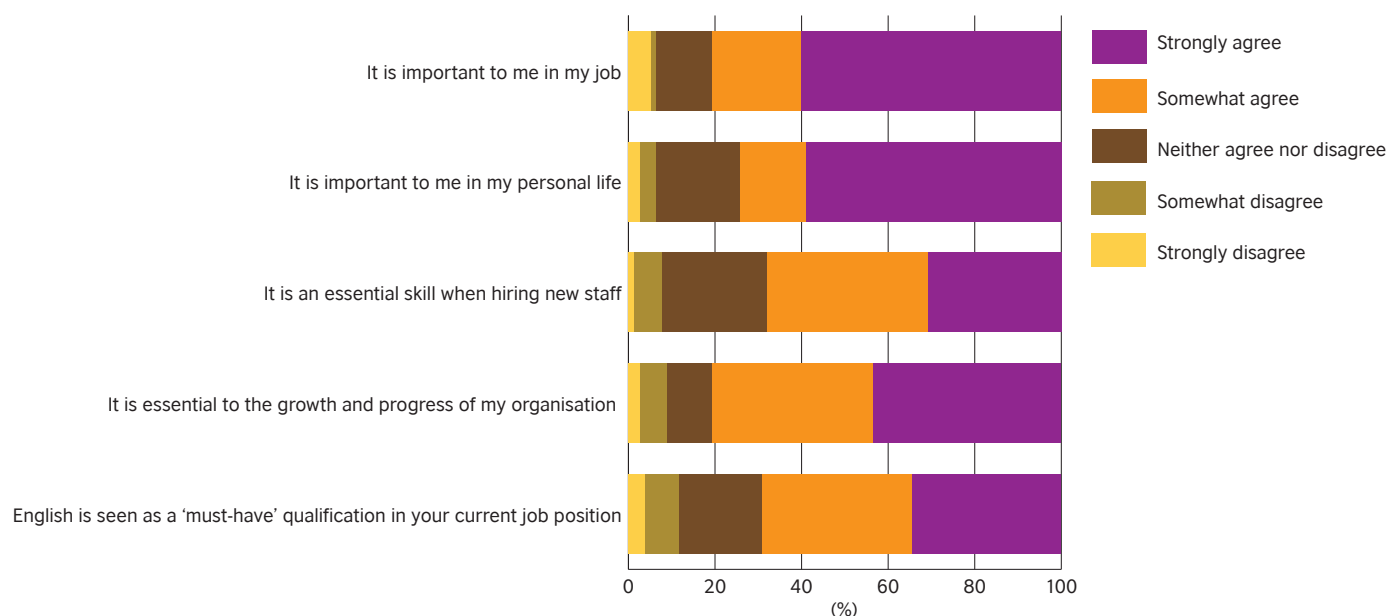
Managers' views

We asked respondents their personal views (as opposed to general company views) on the main reason for Colombians to want to learn English.



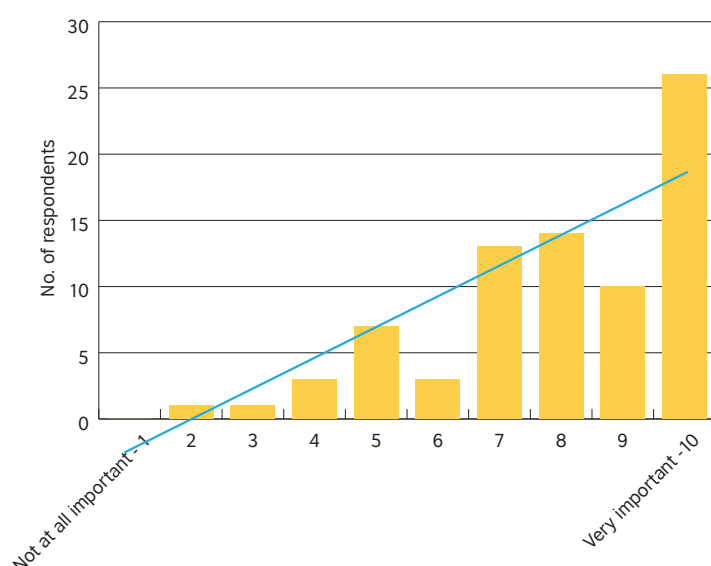
Source: British Council, Education Intelligence, Latin America Databank 2014

As in our survey of the general population, the majority of managers indicated that the main reason people wanted to learn English was to improve their employment prospects (54%). Other reasons included the opportunity to study abroad (37%), to continue in their education (29%) and to get a promotion (27%). This result confirms our previous finding that the acquisition of English is linked to better education and employment prospects.



Source: British Council, Education Intelligence, Latin America Databank 2014

To further understand these views, respondents were presented with a series of statements on how essential English is. While the majority of respondents agreed with all of the statements, there was some variation in their responses: respondents were more likely to agree with the statements 'English is essential to the growth and progress of my organisation' and 'English is important to me in my job'. This last statement, however, also had the highest percentage of respondents that strongly disagreed with it. There was also some ambivalence concerning English as an essential skill when hiring new staff, and this statement had the smallest number of respondents agreeing with it (68%). More than two thirds (69%) of managers agreed that English was a 'must-have' skill in their current position. Overall, these findings reinforce the notion that English increases employment opportunities in Colombia.



Source: British Council, Education Intelligence, Latin America Databank 2014

We asked employers to rate the importance of English knowledge on a scale from one (not important) to ten (essential). The largest percentage of respondents, by a long measure, indicated that English was an essential skill for employees to have. There is a general upwards trend in these findings: none of the respondents felt that English skills were not important.

To better understand why employers place value on English language, we asked respondents to explain why they thought English was or was not essential. The above word cloud is representative of the answers received: the size of a word signifies how frequently respondents used it in their answers. The words that were most prominent, besides 'English', were 'business', 'company', 'language', 'customers', 'communication', 'international' and 'globalisation'. Upon closer investigation, we found that there was an underlying feeling among employers that English is the 'universal language' of business and that it not only allows Colombian businesses to work with those in the English-speaking world but also allows them to share a common language with other non-English-speaking countries, including China and Russia.

Factors in English language learning

The adoption of English as a foreign language by the majority of young Colombians by 2019 is part of the government's push to continue along the path of economic prosperity and globalisation. However, there remains a divide between policy and practice and there are concerns that Colombia will not meet this ambitious target. In addition to government policy, there are a number of push and pull factors that affect English language acquisition. We explore these factors in our data collection and analysis and identify new ways in which these factors are affecting the English learning environment and future demand.

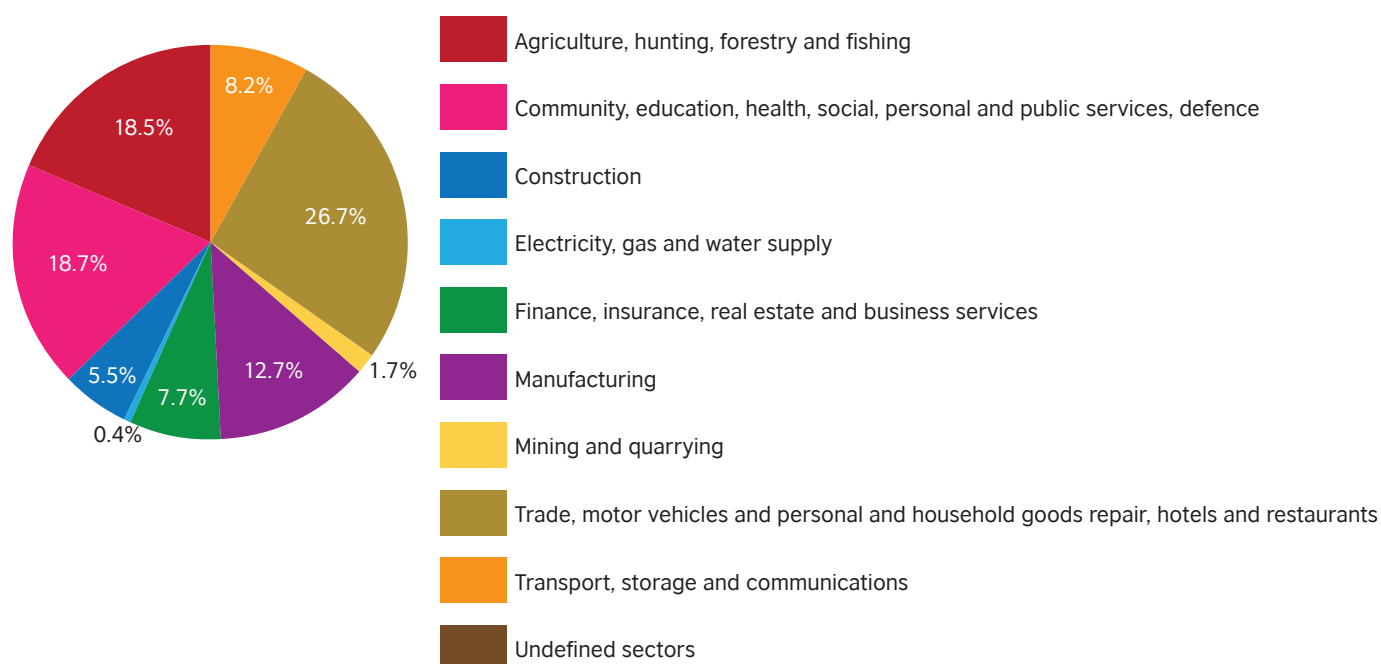
English for employability

Both the employers and the general population that we surveyed felt that English is a skill for human capital and employability. Our findings show that there is an unquestionable desire to learn English: the vast majority of people who do not speak English express the desire to. In addition, there appears to be a clear understanding among respondents that English has the potential to improve their quality of life. Those learning English stated that one of the top reasons that they did so was to improve their employment prospects, while non-learners stated that they would do so in order to obtain better jobs (78%). Better employability was chosen as the top reason for English language acquisition not only by the general population (59%) but also by employers (54%). In fact, one third of employers stated that English was an essential skill for employability in order to integrate with the global economy. While Colombians clearly think that English is necessary for employability, just eight per cent stated that English was necessary for their current job. Others feel that English requirements are over-hyped or vary greatly depending on the level and responsibilities of the job.

Growth industries

In our survey, the industries with the highest proportions of English learners were life, physical and social science (88%), legal (85%), computer and mathematical (79%), management (65%), architecture and engineering (64%) and business and financial operations (64%). Industries that tend to use English externally with clients include health care, medical and pharmaceutical (67%), government and public sector (excluding education and health care) (67%), and distribution, logistics, transport and wholesale (63%). Most of these industries are in the service sector, which makes up the bulk of the Colombian economy.

Employment by industry, 2012

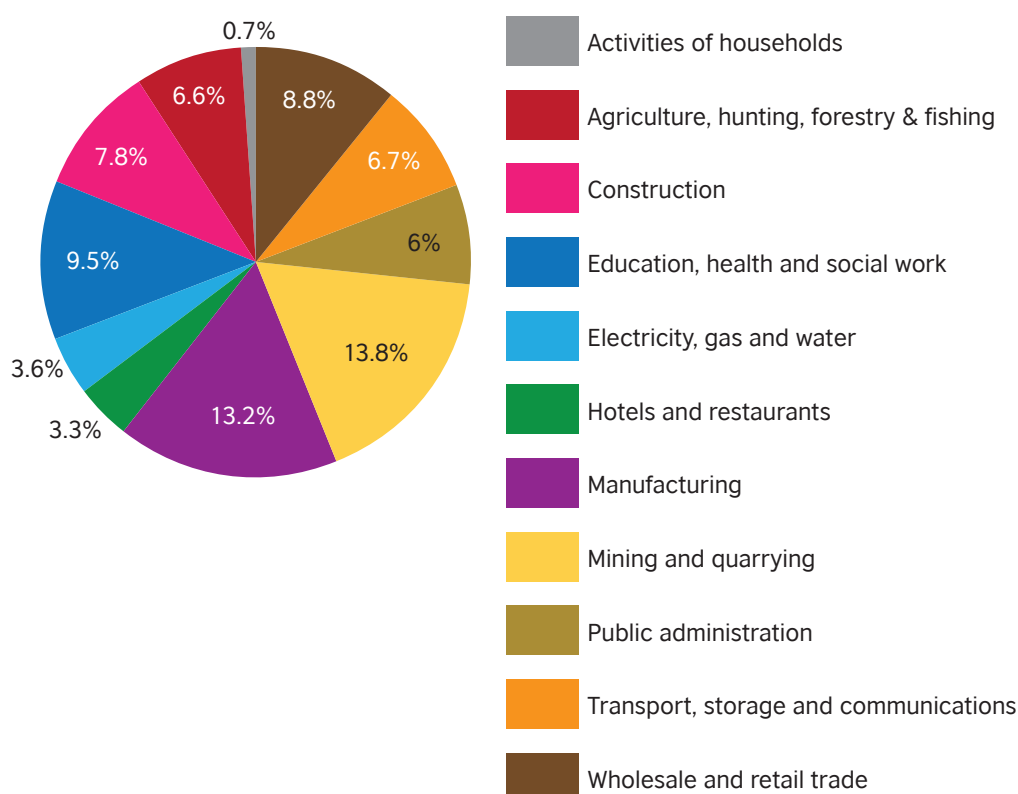


Source: Euromonitor International from ILO

While Colombia has a service-led economy, the agricultural and manufacturing sectors are still significant contributors to national productivity and growth. The Productive Transformation Programme (PTP), which works to provide opportunities in emerging and growth areas, focuses on industries within these three categories, including health tourism and ecological tourism, cocoa production and metalworking.⁵⁵

⁵⁵ British Council, 2014

Gross value added by sector in Colombia: 2012



Source: Euromonitor International from ILO

While services such as tourism and retail are expanding and farming continues to employ 17 per cent of the population, it is the industrial sector that is adding the most value to the economy. Mining and quarrying, for example, makes up just 1.7 per cent of employment but contributes 13.8 per cent of the national economy, followed by construction (7.8% of gross value added).

This economic dynamism from industry is due in part to supportive government policies and an influx of foreign direct investment (FDI) in the past decade, much of which has gone into Colombia's petroleum and mining export services, which accounted for 36 per cent and 17 per cent of FDI in 2011, respectively.⁵⁶ Today, Colombia ranks third in Latin America in terms of FDI, and it has developed a reputation as a good place to do business, ranking first in Latin American and the Caribbean in the World Bank's Ease of Doing Business Index.^{57,58} It has also developed free trade agreements (FTAs), including with the US and the European Union, which are its largest export partners.

Exports have been a major driver of Colombia's economic growth, and the government continues to expand the non-oil export market and cultivate investment in its manufacturing sector, which has stalled in recent years, as well as financial services and tourism. While the need for linguistic exchange in Colombia used to be minimal, tourism, student mobility and migration have meant that English has become increasingly useful. As national security has improved, Colombia is eager to develop as a tourist destination and in 2011, tourism accounted for about 1.9% of GDP, with visitors coming mainly from the US, Venezuela, Ecuador, Argentina and the UK. As a result, there is a growing need for English-speaking hotel workers, law enforcement and transportation officials, and the government is injecting around US\$67 million in order to upgrade its tourist infrastructure, including airports and convention centres.⁵⁹ An increasing number of Colombians are also engaging in foreign travel, and according to our survey, 56 per cent of non-English learners would take classes in order to travel abroad.

⁵⁶ Euromonitor, 2014

⁵⁷ World Bank DataBank, 2015

⁵⁸ Euromonitor, 2014

⁵⁹ Euromonitor, 2014

While there is a surplus of graduates in Colombia, there are also a number of skills gaps. This reflects the over-popularity of subjects such as social sciences, business and law as well as a dearth of highly educated workers in engineering, technology and finance.⁶⁰ There are also talent mismatches in the mining and petroleum sectors and the government-mandated key growth areas of agribusiness, infrastructure, mining, innovation and housing. As industries grow and engage with the global economy, the need for English as a tool for communication and skill for employability will increase in both the services and industrial sectors.

Income

Our survey data shows a clear correlation between income and English language acquisition: 80 per cent of those earning at least COL\$48,000,000 have learned English, while the same is true for just 35 per cent of those with income less than COL\$4,800,000.

The Colombia population is divided into six socio-economic strata, and while these strata do not reflect social standing, they are referenced often in research and policy. These divisions, which are based on housing payments, were created to distribute utilities subsidies. Currently, 89 per cent of the population is in Strata 1 to 3, while 6.5 per cent is in Stratum 4, 1.9 per cent is in Stratum 5 and 1.5 per cent in is in Stratum 6. This reflects the significant inequality in housing and means in Colombia.⁶¹ Rough estimates of monthly incomes for the different strata are as follows:

Stratum 1	USD 0–315
Stratum 2	USD 316–630
Stratum 3	USD 631–1,100
Stratum 4	USD 1,101–3,150
Stratum 5	USD 3,151–9,450
Stratum 6	USD 9,451+

Source: British Council, Education Intelligence, Latin America Databank 2014

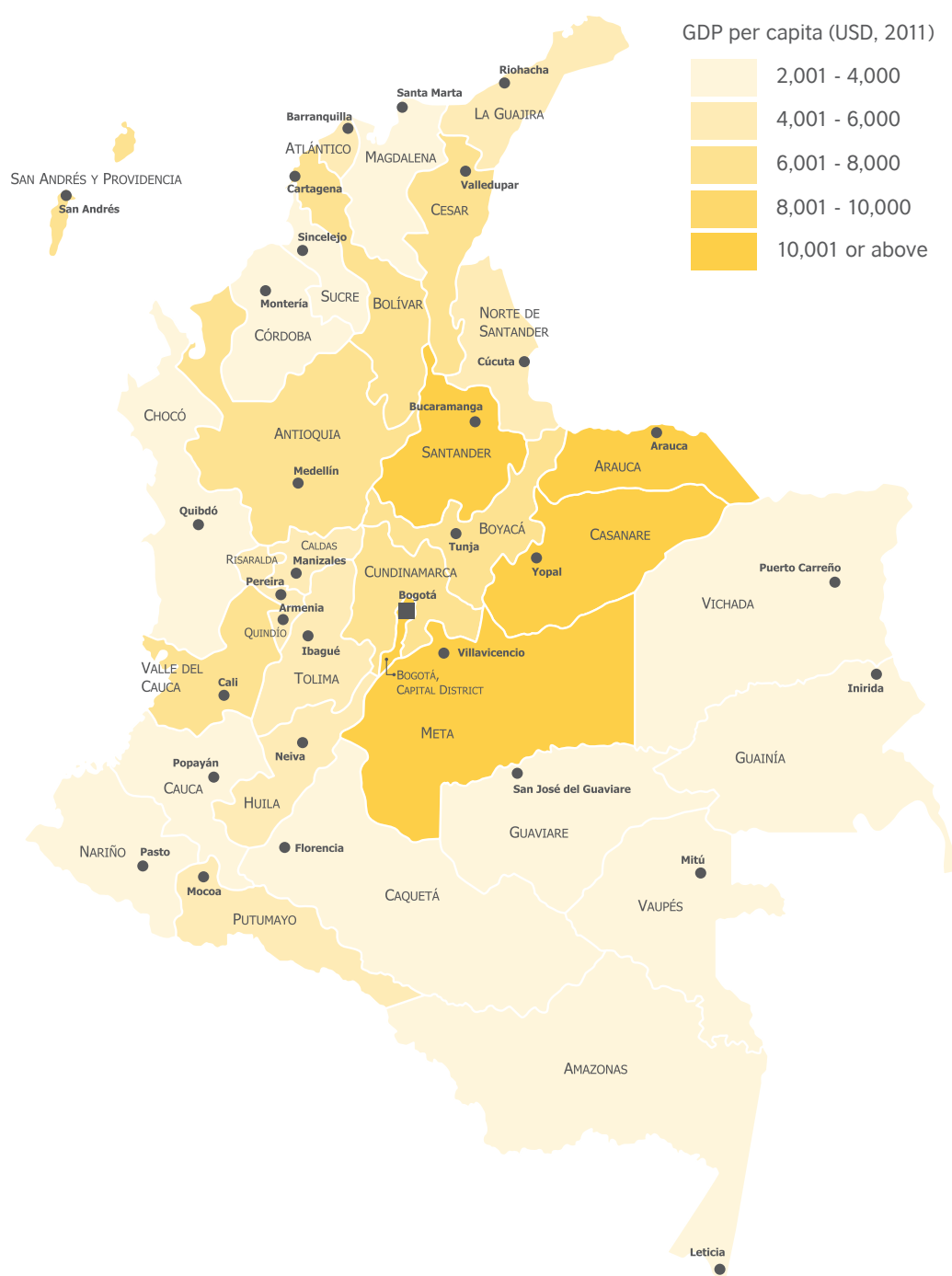
The minimum monthly wage in Colombia is approximately US\$315. This figure increased 24 per cent in real terms over 2007 to 2012.⁶²

Productivity in Colombia is slightly below the regional average; this is due in part to national security issues and the large informal economy. However, GDP is expanding in most areas and urban areas in particular, and consumption is growing as a result.

⁶⁰ Euromonitor, 2014

⁶¹ Colombia: A country study. Federal Research Division, Library of Congress. 2010. Retrieved at: http://lcweb2.loc.gov/frd/cs/pdf/CS_Colombia.pdf

⁶² Euromonitor, 2014



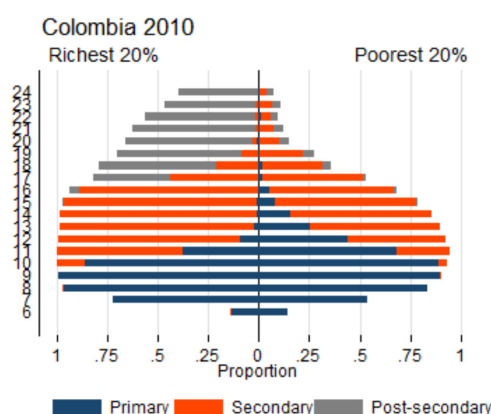
Source: British Council, Education Intelligence, Latin America Databank 2014

Disposable income per capita grew by 2.5 per cent per year on average over 2005 to 2010 and continues to increase. While just 11 per cent of the population belongs to the top three socio-economic strata, the share of the population living below the poverty line fell to 37 per cent in 2011 from 52 per cent in 1990. A prominent middle class has emerged and has doubled to 30 per cent of the population since 2004.⁶³ As a result, annual discretionary spending is forecast to reach nearly US\$4,946 per capita in 2015, while consumer spending should grow at roughly 4.5 per cent annually over 2011 to 2015 to reach US\$4,621 per capita. Rising wealth has gone hand in hand with increased access to education, with enrolment rising from 52 per cent to 99 per cent over 1990 to 2011.⁶⁴

⁶³ Euromonitor, 2014

⁶⁴ Euromonitor, 2014

Education attainment



Source: <http://iresearch.worldbank.org/edattain/>

The richest 20 per cent of the population has a much greater chance of completing school beyond Grade 9 and progressing to upper-secondary and tertiary education, while those in lower socio-economic groups are likely to complete lower-secondary school but not go on to university. However, students in lower socio-economic strata are just as likely to go on to technical colleges as those in the mid- or high-income brackets.⁶⁵

Those that study at college or university can use the experience as a catalyst for improved employability as well as further growth through areas such as student mobility or research. Our survey data also shows that higher levels of educational attainment, up to a four-year university degree, are correlated with English language acquisition. Only 27 per cent of people with less than an upper-secondary education have studied English, compared to 70 per cent of those with a four-year university degree and 67 per cent of those with a professional degree.

University links

The association between university education and English language learning is strong in Colombia. While entry and exit requirements for English vary, 45 per cent of our survey respondents learned English for university and 65 per cent studied it during university. Many students also take private language courses before or during their time in higher education to supplement their coursework. English language learning in higher education is perceived to be higher quality than at secondary level as the quality of teaching is better.

Internationalisation and increased partnerships with other universities and global industries is catalysing the English language acquisition movement in higher education. The majority of academic partnerships in Colombia are with other Spanish-speaking nations, including Spain, Mexico and Chile. However, higher education institutions are increasingly collaborating in other languages, including English (the US and Canada), French (France), Portuguese (Brazil) and German (Germany).

There is anecdotal evidence that even the most academically elite students generally choose to stay in the country for undergraduate education due to a close-knit family culture. However, 23,602 Colombian students were studying abroad in 2012, with the largest shares heading to the US (40%), South America (26%), Central America (19%) and Europe (11%) (UNESCO). One of the reasons for international study is to improve foreign language skills; as student exchange programmes gain popularity in Colombia - as they are starting to - students may be more inclined to study English and other languages as they will have information on the direct benefits to them of learning languages. A small number of individuals from high-income strata or large multi-national firms also travel abroad to study English for educational or professional development. Australia and New Zealand, together with the US and the UK, are becoming increasingly popular for such English language programmes.

⁶⁵ InterMedia AudienceScapes. Urban Colombia Education. Retrieved at: <http://www.audiencescapes.org/country-profiles/urban-colombia/communication-habits-demographic-group/education/education-179>

As these linkages and the research and innovation that inevitably come with them continue to grow, the incentives for universities and their staff and students to engage in foreign language acquisition are increasing. Unofficially, Colombian universities are aiming to increase their prominence in international rankings. As the majority of rankings are based in large part on research cooperation, citations and output, it has become essential for researchers to speak, write and publish in English.

As autonomous entities, universities may offer their own local programmes, often collaborating with the government to provide social assistance in English language training. One prominent institution educates employees of the Colombian Ministry of Transport, while others bring rural teachers on campus to learn new pedagogies and skills. This bottom-up approach to the advancement of the English language agenda is growing, particularly as awareness of social responsibility grows among universities. These efforts could have even greater efficacy if they are able to unite and gain support and accountability from an overseeing agency.

The Colombian government spends just 0.2% of GDP on research and innovation, and university links with industry are uncommon: there is more investment in science and research from foreign companies than Colombian companies.⁶⁶

	2007		2008		2009		2010		2011	
	Job offers	With English	Job offers	With English	Job offers	With English	Job offers	With English	Job offers	With English
Amazonas	139	0	121	3	110	2	211	7	110	3
Antioquia	23,862	11	17,772	9	17,733	80	22,927	75	15,944	66
Atlántico	6,416	7	7,400	4	7,903	9	8,348	77	6,313	42
Distrito Capital	54,200	61	43,584	55	38,150	73	58,116	2,164	52,290	58
Bolívar	3,701	0	4,852	1	4,581	3	6,933	18	3,005	35
Caldas	4,928	0	5,465	4	5,428	1	5,372	2	3,807	3
Cauca	2,492	358	2,315	0	2,531	0	3,760	0	1,571	9
Cundinamarca	4,675	3	5,506	3	7,698	16	7,671	5	5,109	4
Meta	2,993	0	4,775	3	4,065	1	5,246	5	3,791	4
Norte de Santander	5,455	5	6,845	2	6,109	16	5,858	12	3,836	7
Quindío	2,563	0	1,867	0	1,866	4	2,481	213	2,271	10
Risaralda	6,113	6	7,548	1	6,649	8	7,197	5	4,761	5
San Andrés y Providencia	746	27	1,259	23	1,497	0	1,068	0	1,141	0
Santander	10,616	11	11,951	8	13,018	2	14,506	14	7,227	22
Valle del Cauca	13,117	1	11,604	9	8,332	11	13,746	20	11,217	8
TOTAL	142,016	490	132,864	125	125,670	226	163,440	2,617	122,393	276

Source: Herazo, J.D., Jerez, S., Lorduy, D. Opportunity and incentive for becoming bilingual in Colombia: Implications for Programa Nacional de Bilingüismo, 2012.

⁶⁶ Euromonitor, 2014

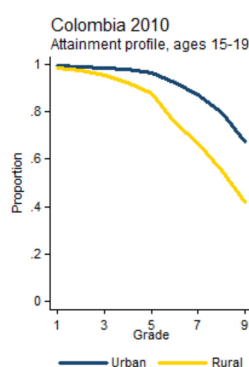
One institution that is inextricably linked to industry is the SENA apprenticeship programme, which is under the jurisdiction of the Ministry of Labour rather than the MEN. By importing English-speaking volunteers, training high-quality teachers and providing long-term funding and blended learning, SENA's language policy is able to focus on the English skills needed by industry. SENA's approach of teaching General English and English for Special Purposes impresses on students the importance of and need for English. While SENA is actively encouraging English language acquisition, however, very few job offers through SENA actually require English.⁶⁷

Migration

In the past, migration was a way for well-educated, linguistically skilled Colombians to put their capabilities to use. Emigration has also been compounded by security issues, and many highly qualified professionals have left the country, resulting in net outward migration.⁶⁸ For example, 72 per cent of Colombian migrants to the US have a secondary or higher education qualification and of those, 28 per cent have a university or technical qualification.⁶⁹ The majority of Colombian emigrants, which totalled 2.1 million in 2010, travel to the US, Venezuela, Spain, Ecuador, Canada, Panama, France, Italy, the UK and Germany.⁷⁰

Access

As a part of the development agenda, national English policy is intended to have a trickle-down effect. However, as some communities and regions within Colombia remain isolated, not everyone has access the opportunities created by this policy. Extreme diversity between Colombia's regions also means that English is used differently from place to place. The major cities of Bogota, Medellin, Cali, Barranquilla and Bucaramanga are centres of population, business, industry and English language acquisition. Other cities, such as Meta, Cesar and Putumayo, have seen an economic boom due to mining but not holistic economic growth, while others again owe their wealth to cash crops such as coffee. The English skills needed by each of these distinct areas differ significantly.



Source: <http://research.worldbank.org/edattain/>

In rural areas, which are home to a quarter of the population, only around 40 per cent of students remain in school until Grade 9, and in many of these schools, English is not taught. The underdeveloped physical and technological infrastructure in many rural areas makes access to national support for English language training difficult. For students in rural schools, imbalances in how government social payments are distributed mean that they often do not benefit from scholarships and similar education support.

While it was based on the principles of equity and access to all, the bilingualism programme initially failed to make provisions for the population whose second language is Spanish and who are therefore already bilingual. This population may require different incentives and options for learning an additional language.

⁶⁷ Herazo, J.D., Jerez, S., Lorduy, D. *Opportunity and incentive for becoming bilingual in Colombia: Implications for Programa Nacional de Bilingüismo*, 2012

⁶⁸ Euromonitor, 2014

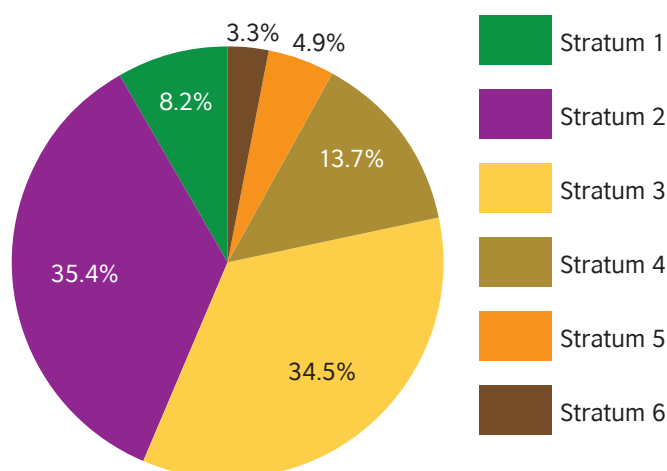
⁶⁹ OECD Colombia profile. 2009. Retrieved at <http://www.oecd.org/dev/americas/44535755.pdf>

⁷⁰ Euromonitor, 2014

Internet and media

The proliferation of telecommunications and technology has affected how Colombians acquire English and will continue to drive growth in language acquisition. The population is becoming increasingly well connected, particularly in cities, and the number of mobile subscriptions and Internet users is increasing, with frequent use of social media and global search engines.⁷¹ Over US\$50 million was invested in technology infrastructure 2013, and in 2012, in Bogota there were 16.7 per cent subscribers to the total population.

Residential Internet connections by socio-economic stratum



Source: Colombian Ministry of Information and Communications Technology (2013)

Socio-economic Strata 2 and 3 accounted for the majority of residential Internet connections in 2012. It is important to note that while overall statistics show growth in the sector there are a number of rural regions that have Internet penetration rates of close to zero per cent.⁷² However, in 2014 the Ministry of Information and Communications Technology stated that mobile Internet users (numbering 4.49 million) in Colombia exceeded fixed-connection users (4.46 million), indicating that the mobile technology market may be the key to improving access, especially in rural areas.

Our survey results show that many confident English users attribute their skills to English-language TV, movies and music, which are becoming increasingly accessible through technology. Among advanced and fluent users, 16 per cent attribute their English skills to the use of Internet and social media, while 36 per cent attribute strong speaking skills to watching English-language films and television. In addition, there is a close link between English language acquisition and access to information: 21 per cent of English learners learned English in order to access more sources of information, including information online.

⁷¹ Euromonitor, 2014

⁷² Colombian Ministry of Information and Communications Technology (2013)

Teacher preparedness and pedagogies

There are currently around 190,000 primary school teachers and 193,000 secondary school teachers in Colombia. Primary school teachers teach a full range of subjects and therefore do not specialise in English. Teachers in private schools generally have degrees and access to professional development; however, they may still be more qualified to teach other subjects than to teach English: English proficiency does not make someone a proficient English instructor.⁷³ English teachers face a number of difficulties, including a lack of resources, teaching methods and time as well as large class sizes, with an average of 25:1 ranging up to 50:1.⁷⁴

There is anecdotal evidence that teachers want to improve their English and provide better instruction for students, but they report that the decentralised system means that they have too much responsibility and too little support. This situation is exacerbated by non-English-speaking administrators requesting teachers to teach English and being expected to provide support that they cannot give. At some levels, teachers do not need a university degree, and a history of seniority- rather than merit-based promotion means that there may be little motivation and few incentives for teachers to improve. Those that do make strides in English teaching often do so of their own volition and, potentially, through self-funding. Overall, our research shows that English teachers are held in high regard: just two per cent of respondents who rated their English as poor or intermediate attributed their lack of skills to their teacher.

The MEN conducts professional development online. The original analysis of teacher preparedness for this policy was based on a voluntary test, meaning that the data suffered from self-selection bias. As such, while the government materials are helpful for some, for others they are inappropriate or simply inaccessible due to a lack of connectivity. The idea of importing native English teachers to help improve teacher preparedness has been discussed often; however, laws passed in 2012 have made it more difficult for English teachers to obtain visas.⁷⁵

Inclusive English environment

Our data shows that Colombians would learn English if they had the opportunity to do so. They associate English with a better quality of life, resulting from better employability and therefore greater access to more skilled and highly paid employment. However, the majority of Colombians lack contact with the language in their daily lives. Positive associations are often made between English language and access to global media. However, for many Colombians, this is fairly limited in reality and English is not an integral part of their personal or professional lives.

Research has shown that positive associations with language learning at an early age increase motivation to learn, and parents are crucial role models for young learners. However, if English is not used, practiced or valued within the family environment, positive associations cannot be forged within the home. We find that this is often the case in Colombia, meaning that there is more pressure on teachers to fill this role. However, if teachers are not sufficiently trained or motivated, the negative language learning environment also prevents the development of positive associations.

At the macro-level, the decentralisation of English policy management may lead to disjointed messaging across ministries, local authorities and higher education institutions as well as between teachers. Similarly, the political system, with its four-year terms, makes it difficult to implement comprehensive, sustainable programmes over a longer period, which may contribute to uncertainty and a lack of motivation in the teaching and learning environments.

⁷³ Zarate, J.A. and Alvarez V., J.A. *A Perspective of the Implications of the Common European Framework Implementation in the Colombian Socio-cultural Context*. Universidad Disitrtal Francisco Jose de Caldas, 2005

⁷⁴ World Bank DataBank, 2013

⁷⁵ Howlett, K. *Colombia's Problem with English*. *Colombia Politics*, 28 May, 2014. Retrieved from: <http://www.colombia-politics.com/colombias-problem-with-english/>

Opportunities in Colombia

English proficiency has become a national priority for the Colombian government, which has taken important steps towards implementing English policy. However, a number of challenges are hindering sustainable progress towards the government's targeted English language levels. These include the lack of training and resources for teachers and the difficulties faced by the population in lower socio-economic strata in accessing quality English learning opportunities. An awareness of where the gaps and opportunities lie may be advantageous for market observers and are summarised below:

- there are no formal mechanisms to ensure the standardisation of English curriculums, so provision varies greatly
- English is becoming increasingly valued in growth industries in the services sector, which comprises the bulk of the Colombian economy
- Colombians in lower socio-economic strata lack high-quality opportunities to learn English
- private English schools are seeing much faster growth in enrolments among older students, including teenagers and adult professionals, than among school-age children
- there has been an increase in the number of Internet subscribers and social media users, with more free access points, such as libraries
- without financial or access constraints, Colombians would welcome the opportunity to learn English if given the chance

In conclusion

The National Bilingual Programme (PNB), now the Foreign Languages Competencies Development Programme (PFDCLC) and the Colombia Bilingue plan, represents an ambitious effort on the part of the Colombian Ministry of Education (MEN) to increase human capital and raise the country's position in the global economy. The programme has become an integral part of the development and competitiveness agenda across ministries and local entities. While progress has been made, the goal of an English-speaking population by 2019 is largely felt to be unattainable. Some feel that the policy has come too soon and that Colombia lacks a suitable learning environment in its public and private schools to effectively and equitably promote English language acquisition. While the incentives for learning and teaching English are lacking for some, there is still significant interest in the language. As English language learning in Colombia cannot come from the bottom up as the language is not a well-established part of family or business culture, the long-term success of this policy depends largely on the economic, political and cultural factors that are shaping the country.

English is widely seen as a skill for greater employability, regardless of whether English is actually used or necessary in workplace. With strong growth in industry and services being fuelled by foreign investment, English is set to become highly valued in the marketplace. Real English acquisition is currently limited to higher socio-economic strata, where students often have access to bilingual or private education. However, as local programmes - including university partnerships and exchanges - mature, there should be more opportunities for equitable learning.

The English culture in Colombia is growing, with English-language media reaching an increasing number of students and, in some cases, aiding their learning. However, the challenges faced by English teachers - a lack of resources, motivation, access, time, language skills and contextual training - continue to present barriers to positive and equitable English acquisition in formal education.

Access issues, geographical disparities and decentralised government mean that a holistic language policy such as Colombia's is largely open to individual interpretation. Is this policy a way to unite a nation in building competitiveness, or is it unrealistic to expect one goal to apply to such a diverse country? While the answer remains uncertain, what is known is that a major, top-down programme such as this that aims to change the linguistic culture of a nation must begin by examining the factors that shaped the culture it is trying to change.

'Nothing happens if you don't do anything.' – Colombian Ministry of Education
