

English in Chile

An examination of policy, perceptions
and influencing factors



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Introduction

Chile is one of Latin America's most stable and prosperous nations. Its economy was the fastest growing in the region in the 1990s, reflecting effective economic policies, and Chile has weathered recent regional economic instability well. Despite economic growth, significant income and wealth inequality is a persistent challenge. Chile is the world's largest producer of copper and is keen to diversify away from this industry by internationalising and creating a more globally competitive workforce. Cultural diversity is also significant, and indigenous people comprise approximately 4.6 per cent of the population.¹ Reforms in the post-Pinochet era have aimed to create opportunities for all, including universal access to quality education.

¹ "Indigenous people in Chile." 2011. Retrieved at <http://indigenousnews.org/indigenous-peoples/chile/>

Methodology

Phase 1

Desk research and secondary data collection

In Phase 1 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 2.

Phase 2

Quantitative primary data collection

In Phase 2 we collected primary data through two main channels:

- an online survey of 1,000 people from the general Chilean population, most of whom were aged 16-35
- an online survey of 100 Chilean employers varying in size from ten to over 1,000 employees, with the sample taken from managerial and executive staff

Phase 3**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 interviews carried out in Chile.

Interviews**Government**

- Regional Manager, Ministerio de Educación (MINEDUC), Valdivia
- Director, Programa Inglés Abre Puertas, Santiago
- Programme Coordinator, Programa Inglés Abre Puertas, Santiago
- Programme Coordinator, Programa Inglés Abre Puertas, Santiago
- Commercial Officer, British Embassy, Santiago
- Regional English Language Officer, US Embassy, Santiago

Education institutions

- English Programme Coordinator/Adjunct Professor, Universidad de Chile, Santiago
- Director of Languages, Universidad Tecnológica de Chile, Santiago
- English Department Head, School of Education, Universidad Alberto Hurtado, Santiago
- English Language Programme Coordinator, School of Education, Universidad Alberto Hurtado, Santiago

Education professionals

- Academic Coordinator, Centro de Enseñanza de Lenguas Extranjeras (CEELE), Santiago
- Sales and Programmes Coordinator, International Center, Vina del Mar
- Course Coordinator, Tandem Santiago Escuela de Idiomas, Providencia, Region Metropolitana
- Rector, Universidad Chileno-Británica de Cultura, Santiago
- Programme Coordinator, Universidad Chileno-Británica de Cultura, Santiago
- English Coordinator, Desarrollos Educativos S.A., Red de Colegios Pumahué-Manquecura, Santiago
- Independent Education Management Professional, Corporación Aprender, Santiago
- General Management Advisor, Corporación SOFOFA, Santiago
- General Manager, SIP Red de Colegios, Santiago
- Country Director, British Council Chile, Santiago
- English Language Manager, British Council Chile, Santiago
- School Sales Manager, English and Exams, British Council Chile, Santiago

Human resources and recruitment professionals

- Talent, Training and Resourcing Manager, Nestlé Chile S.A., Santiago

Professional associations

- English Language Professor, International Association of Teachers of English as a Foreign Language (IATEFL) Chile, Santiago

English learners

- University student, English pedagogy major
- University undergraduate, business administration major
- Graduate student, history

Key findings

- Chile has the fourth largest proportion of primary pupils enrolled in private schools in the world, and 40 per cent of total education expenditure comes from private sources, mainly from households
- Despite growth from industrialisation, privatisation and foreign direct investment, Chile remains one of the world's most unequal countries in terms of wealth
- Current education reforms aim to phase out the co-payment of subsidised private schools, ensuring free education for all and abolishing selective practices in education
- As part of the government's English initiative, the English Opens Doors Programme (EODP), students begin learning English in Grade 5, with the goal of reaching B1 by graduation
- New teachers will be required to raise their levels of English to C1
- There is a general positive correlation between English language ability and education attainment, private schooling and household income
- Academic requirements are the strongest catalyst for English learning: the most common reasons for learning English are that it was mandatory in secondary school (61%) or primary school (43%) or that it was necessary for university (33%)
- Chilean students who are confident in their English writing, reading and speaking skills attribute this to self-motivation and personal language practice
- The largest barriers to learning English are cost and a lack of access to government-funded programmes
- The majority of non-learners (82%) would study English to improve their employment prospects, and both learners and non-learners tend to view English as a tool for greater employability
- English learners feel that the biggest value of English is in being able to communicate with more people
- Almost a third (30%) of the employers surveyed offered English language training opportunities for employees
- Chilean employers largely feel that English is essential for management-level staff, and 48 per cent feel that it is an essential skill in general

Macro analysis

Chile is a democratic republic comprised of 15 regions that are home to around 17 million people. With GDP per capita of US\$15,732 in 2013, Chile is classified as an upper-middle-income country. Over the past 15 years, growth in GDP per capita averaged 4.1 per cent annually and per capita income doubled in real terms. As a result, Chile has become a prominent economic force in Latin America and is an OECD member. In 2014, Chile ranked 33rd in the world and first in Latin America in the Global Competitiveness Index. However, the country remains characterised by a wide divide between the rich and the poor: Chile is the most unequal country in the OECD, and in 2011, the average income of the wealthiest ten per cent of the population was 26.5 times greater than that of the poorest ten per cent (OECD). Efforts are being made to eradicate poverty and provide greater access to education and services for the lowest socio-economic segments of the population.

Education governance

The education system in Chile is fairly unusual in many respects compared to those of other OECD countries, especially in terms of the role of the private sector. In the early 1970s, General Augusto Pinochet created an economic plan that centred on integrating Chile into the world market, reducing public spending by privatising many industries and attracting foreign direct investment. This period of military dictatorship resulted in an extreme experiment in free-market economics, and the effects of policies from this era are still felt today. Chile's education system, which was structured along the lines of 19th century French and German models, was essentially dismantled in 1981.² The administration of schools was decentralised and the responsibility for public school management transferred from the Ministry of Education (MINEDUC) to the municipalities. The government also changed the way education was financed by creating a 'voucher system', under which public and some private schools were given subsidies depending on enrolment and schools' revenues were determined by how many students they enrolled and the government-determined subsidies they received.

The idea behind this was to weed out less efficient, low-quality schools by allowing students, empowered with their vouchers, to choose the schools they believed would provide the best education. This market-driven approach produced a tenfold increase in student numbers.³ However, it also widened the gap between the country's rich and poor: richer municipalities could dedicate more funds to education, and high-income households could more readily access information about education options and transport students to the best schools.⁴ Subsidised private schools also became selective in their admissions processes over this period, choosing high-income students over their poorer counterparts. Exclusive private schools that did not receive government subsidies remained largely untouched during this period and continued to attract the country's elite and expatriate communities.

Today, Chile has the fourth largest proportion of primary pupils enrolled in private schools in the world, and private enrolment is three times higher than the OECD average: only 37 per cent of 15-year-olds attend publicly funded, publicly run schools, compared to an OECD average of 82 per cent, and 40 per cent of total education expenditure and more than three quarters of tertiary expenditure comes from private sources, and mainly from households, compared with a third on average in the OECD. Students in public schools score lower on the national *Sistema de Medición de la Calidad de la Educación* (SIMCE) test, which measures skills across a variety of subjects, and the country's universities are more likely to enrol graduates from private schools, followed by graduates from subsidised private schools, over public school students. This reflects the lower quality of education and poorer education outcomes in public schools.

Since the restoration of democracy in 1990, reforms have been hampered by the 1980 constitution, which enshrined certain aspects of the former political system by making it very difficult to change the constitution. The election of the current president, Michelle Bachelet, in December 2013 could herald major changes: during her campaign Bachelet promised to respond to protests over tuition fees by subsidising the fees of the poorest 70 per cent of students and to address wider

² Drake, Paul W. "Chile." *Encyclopedia Britannica*. Retrieved at <http://global.britannica.com/EBchecked/topic/111326/Chile/24697/Education>

³ Jump, Paul. "From Pinochet to Pinera: Chile's way is to make students pay." *Times Higher Education*. 5 May 2011.

⁴ *The failings of Chile's education system*. Council on Hemispheric Affairs. 30 July 2008. Retrieved at <http://www.coha.org/the-failings-of-chile's-education-system-institutionalized-inequality-and-a-preference-for-the-affluent/>

concerns that the current education system entrenches inequality, including by eliminating selective admissions policies at all levels of education.⁵ The unusually powerful influence Chilean students have exerted in recent years has also contributed to the need for reforms to address the perception that quality education is only afforded to the country's wealthy. However, at the same time, the government must contend with the possibility that many subsidised private schools will close as well as the fears of some parents that they will be forced to send their children to lower-quality public schools.⁶ As education reform is ongoing, major changes are anticipated and continue to be announced.

Structures of governance

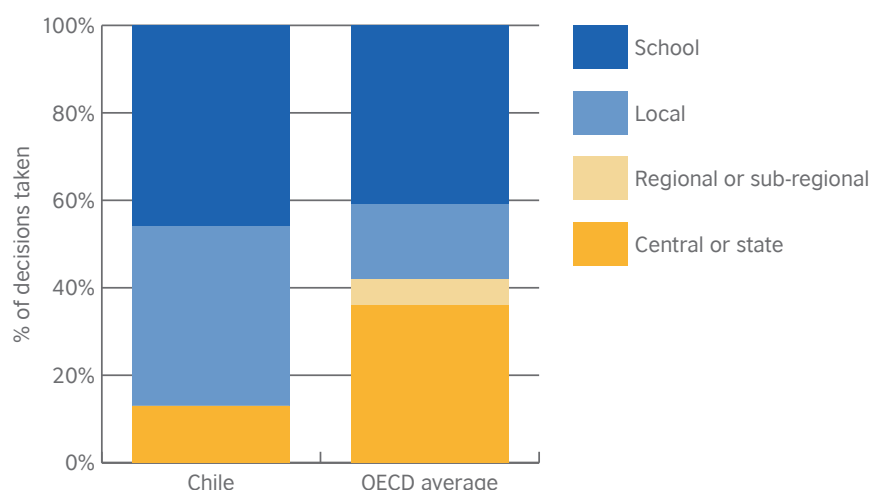
MINEDUC sets the framework for education, guides policy and sets priorities for the system across all levels from pre-primary to tertiary. It creates policy on access to education, including rights and freedoms, and proposes changes to the legal framework governing education. It also develops the core compulsory curriculum, issues operating licences for schools, monitors school performance and distributes subsidies. The National Education Council (Consejo Nacional de Educación, CNED) is an advisory body of stakeholders that gives feedback on and approves ministerial proposals, including on the curriculum, quality assurance and the standards pupils need to reach at each grade.

Two new bodies were created in 2012: the Superintendencia de Educación Escolar and the Agencia de Calidad de la Educación. The role of the former is to ensure that schools comply with relevant laws, regulations and standards. The latter carries out inspections and evaluates schools, classifying them according to performance as measured by learning outcomes, taking into account student characteristics. This allows for comparison between schools. Schools that fall consistently in the low-performance category for four consecutive years will have their licences revoked, with choices given to parents about alternative provision.

Schools operate in a decentralised manner, with many decisions on administrative and educational matters taken at the school or local municipal level. The degree of autonomy varies between types of school. In public schools run by municipalities, about half of the decisions about educational practices are taken at the school level and the rest at the local level, while decisions about learning resources and study programmes are taken by schools or school owners following the guidelines set by MINEDUC. Privately managed subsidised schools, which enrol over 50 per cent of pupils, have complete autonomy, but those that receive the Preferential School Subsidy (Subvención Escolar Preferencial, SEP) must take part in initiatives for school improvement.⁷

The highly decentralised nature of education governance is illustrated in the chart below, which shows the decisions taken concerning public lower-secondary schools at each decision-making level.

Percentage of decisions taken in public lower-secondary schools by decision-making level, 2011



Source: OECD (2012), Education at a Glance 2012: OECD Indicators

⁵ "Bachelet pledges radical constitutional reform." *The Guardian*. 16th December 2013.

⁶ "Chilean parents march against President Bachelet's education reform." *BBC News*. 25 October 2014.

⁷ "OECD Education Policy Outlook, Chile." *OECD*. November 2013.

Tertiary governance

There are three types of tertiary institutions established by law: universities, professional institutes (*institutos profesionales*) and technical training centres (*centros de formación técnica*). All institutions must be licenced to operate and complete an accreditation process in order for their students to be eligible for financial aid. The maximum amount of financial aid payable per student also depends on quality indicators. Higher education institutions enjoy a great amount of autonomy. The 25 institutions that are members of the Council of Rectors of Chilean Universities (*Consejo de Rectores de las Universidades Chilenas*, CRUCH) are perceived as having higher status than many other, newer institutions.

As in the school sector, reforms are currently underway. These aim to change the accreditation system and improve government oversight as well as provide potential students with more information on the quality of courses and institutions. The pace of change is rapid and reforms are ongoing.

Current reforms

The reforms that are making their way through the legislative process at the time of writing this report have a number of elements, including expanding pre-school education, increasing government funding and creating more public universities.⁸ The aims are to phase out co-payment, make secondary education free, and to fund free university education for students from low-income households. The most contentious reform prohibits owners of state-subsidised private schools from making profits and overhauls the way admissions are regulated to prevent selective admissions by schools that receive state funding. The state will also increase funding for schools to ease the burden on low- and middle-income households. The reforms are designed to reduce inequality and were made in response to the massive student movement of the last few years; however, they have met with opposition from some middle-class parents, who believe that many subsidised schools will close as a result, leaving parents reliant on state schools as they cannot afford to pay for private schools. The Catholic Church, among others, has also voiced concern, partly because it oversees hundreds of schools that will have to go either fully public or fully private under the reforms. The cost of these reforms means that substantial changes to the tax system are required, making this a complex and difficult process.

Student protests

Students have had an influential role in determining education policy in Chile. Over a period of several months in 2006, students launched what became known as the 'Penguin Revolution', a series of protests during which they filled the streets and occupied buildings, demanding education reform. Protests were based on the belief that, considering the country's well-publicised robust economic growth, the lack of essential school supplies such as books and desks was evidence of misplaced government priorities. Rallies attracted as many as 800,000 people, and the protests transformed students - many dressed in black and white uniforms that prompted the penguin reference - into an influential social movement that was perhaps the most powerful since the military dictatorship ended 25 years earlier. The government of the newly-elected President Bachelet, who had run on a platform of social justice and compassion for the economically vulnerable partly due to the student protests, boosted education spending and began an examination of the highly unequal education system. A series of student demonstrations has continued to take place, both before and after the announcement of the most recent education reforms.

⁸ Dube, Ryan and Robert Kozak. "Chile's President announces education reform package." *Wall Street Journal*. 19 May 2014.

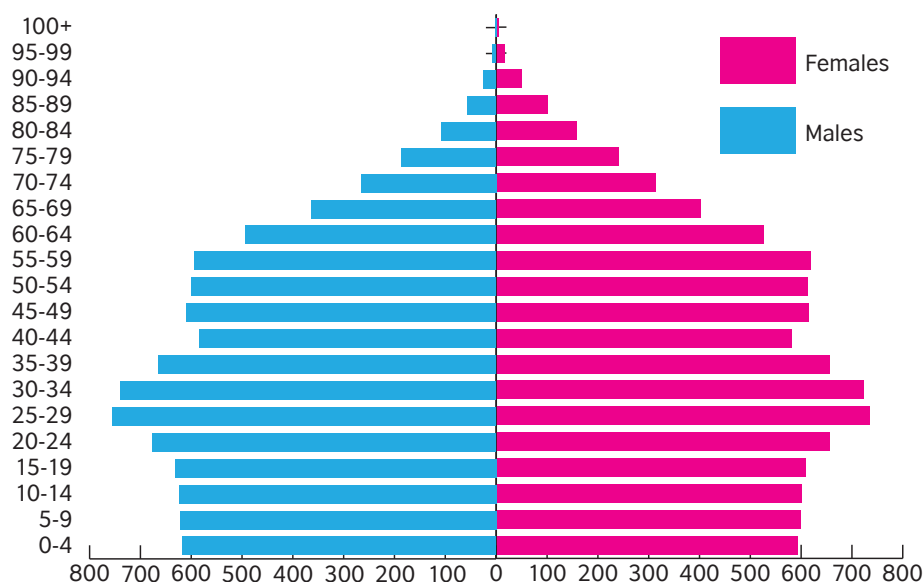
Education indicators

Population

The population of Chile was estimated at 17.6 million in 2013. The population is in decline, with a fertility rate of 1.83 children per woman in 2012, and the demographic profile is ageing rapidly. Immigration has been low historically, partly reflecting the country's remote location. In the years following the military coup in 1973, around half a million Chileans left the country, and while the dictatorship's openness to foreign investment encouraged a few incomers, the foreign-born population reached a low of 0.75 per cent of the population in 1982. The restoration of democracy brought many people back to the country, and in more recent years, the country's economic stability and growth have stimulated further immigration, especially from other Latin American countries. Immigration doubled over 2006-2013, and in 2013, the number of people securing temporary or permanent residence rose by 24 per cent to just over 158,000, the largest groups of which were from Peru, Colombia and Spain.⁹

In 2014, 20.7 per cent of the population was under the age of 15, while 16.3 per cent was aged 15-24, 43.2 per cent was aged 25-54, 9.9 per cent was aged 55-64 and 9.9 per cent was aged over 65. The population pyramids below illustrate how the population is forecast to age and the young population decline through to 2050.

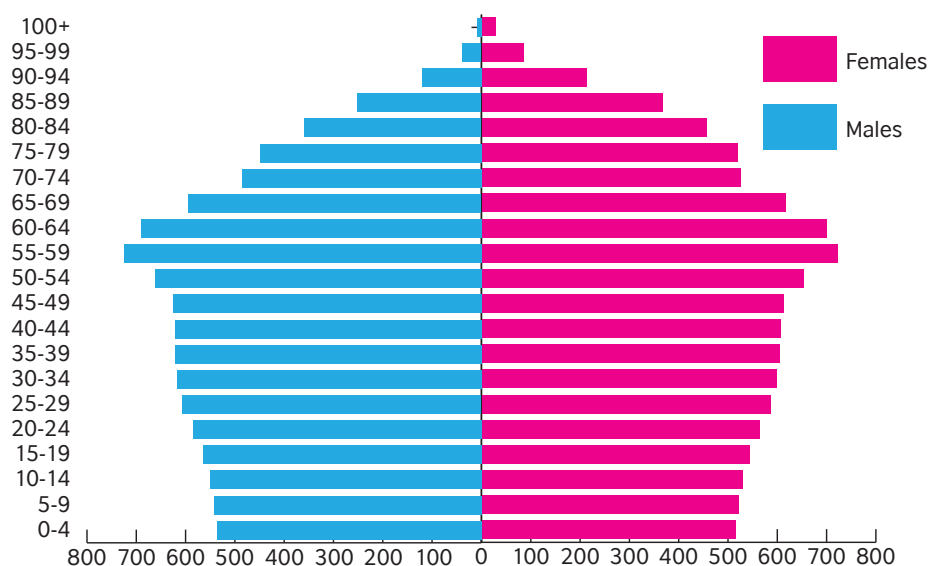
Population pyramid, 2020, medium variant projection



Source: UN Population Division

⁹ Quiroga, Javiera. "Chilean immigration up on influx from Andean neighbours." Bloomberg. 4 July 2014.

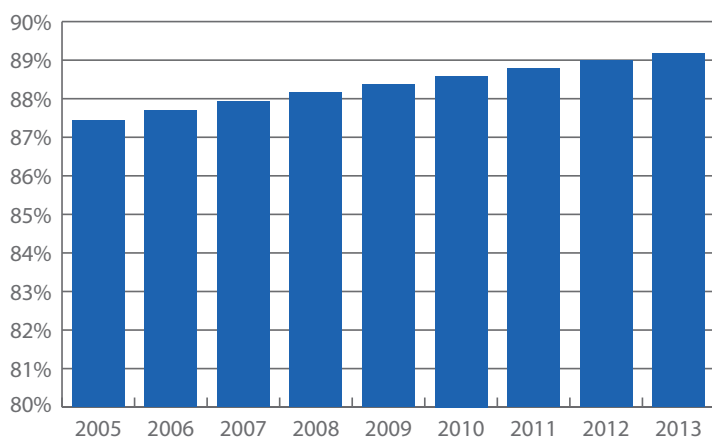
Population pyramid, 2050, medium variant projection



Source: UN Population Division

While the population aged 0-19 is in decline and the segment aged 20-24 will peak in 2017, Chile still has a much lower elderly dependency ratio than the OECD average, and 37 per cent of the population is under the age of 24. As such, one of the main challenges lies in making the best use of the comparatively young population in order to maximise economic development. This is one of the factors behind the urgent need to reduce inequality in education.

Urban population as a % of the total



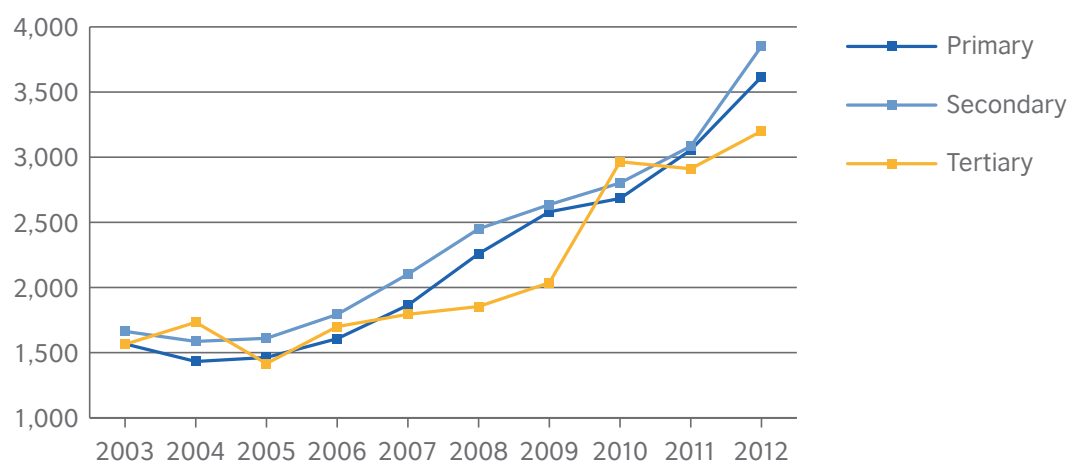
Source: World Bank Databank, 2014

In 2014, 89 per cent of the population lived in urban areas, and this proportion has grown only slightly from 81 per cent in 1980. This reflects the well-established industrialisation and urban development processes in Chile. The largest share of the urban population (41%) lives in the capital and largest city, Santiago, while 36 per cent of the total population lives in urban areas with a population of over one million. Actual student numbers in rural communities are small, meaning that while education opportunities in rural communities are numerous, they are limited in scope.

Education spending

Education spending as a percentage of GDP has risen gradually, increasing from 3.9 per cent in 2003 to 4.5 per cent in 2012. While a large and growing proportion of education spending comes from private sources, the government has also devoted larger shares of its budgets to education: 19.4 per cent in 2012 compared to 17.6 per cent in 2003. In per-pupil terms, government spending is fairly even across the primary, secondary and tertiary sectors; however, the gap between spending on primary and secondary students and those in tertiary education has grown since 2003.

Government spending per student, primary, secondary, tertiary (PPP\$)



Source: UNESCO

Private spending on education in Chile is higher than the OECD average at all levels, with the exception of pre-primary education, and is the highest in the OECD overall.

Share of private expenditure

SHARE OF PRIVATE EXPENDITURE ON EDUCATIONAL INSTITUTIONS	2012	2011	OECD RANKING
Pre-primary education	16%	19%	17 of 33
Primary, secondary and post-secondary non-tertiary education	22%	9%	2 of 36
Tertiary education	76%	31%	1 of 34
All levels of education	40%	16%	1 of 33

Source: OECD

Education enrolment

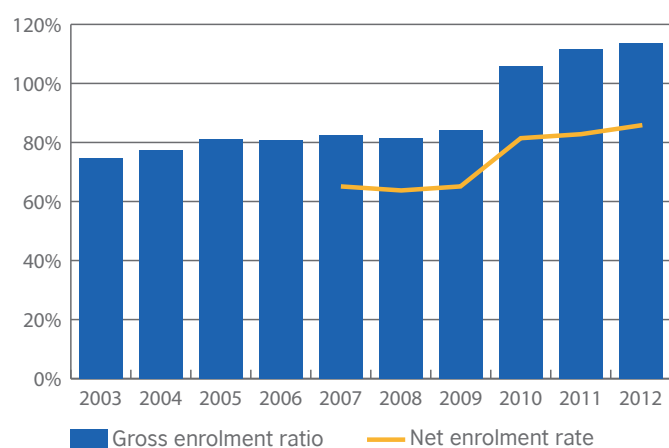
Compulsory education lasts for 12 years from the age of six to 18. Free compulsory education at secondary level was introduced in 2003, and the extension of compulsory education from eight years to 12 was a significant advance in Latin America. In practice, the average school life expectancy is 15.2 years and is slightly higher for girls, at 15.5, than for boys, at 15.

ENROLMENT IN EDUCATION, 2012	TOTAL	PUBLIC	PRIVATE
National	3,520,498	1,356,472	2,164,026
Pre-school	573,046	186,106	386,940
Primary	1,503,898	598,339	905,559
Lower-secondary	504,618	226,397	278,221
Upper-secondary	938,936	345,630	593,306

Source: UNESCO UIS

There was a significant increase in enrolment in pre-primary education in the last decade, following a reform that made it free but not compulsory. According to the OECD, enrolment for four-year-olds is now approaching the OECD average, but enrolment for three-year-olds remains lower, with only 45 per cent enrolled in 2012 compared to an OECD average of 70 per cent. At 0.8 per cent of GDP, government spending on pre-primary education is now higher than the OECD average.¹⁰

Pre-primary education

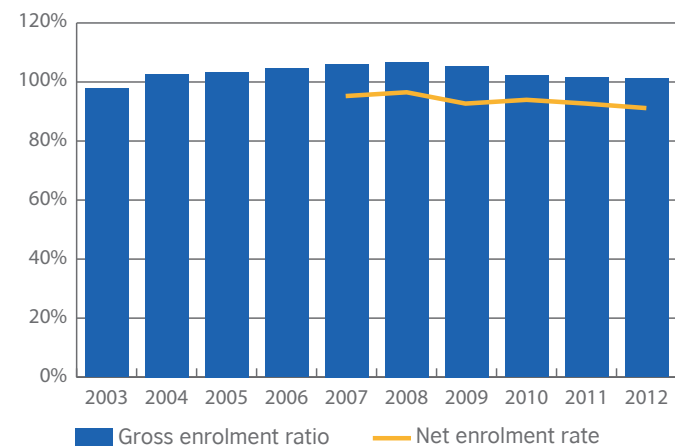


Source: UNESCO

¹⁰ "Chile Education at a Glance 2014." OECD. 2014. Retrieve at <http://www.oecd.org/edu/Chile-EAG2014-Country-Note.pdf>

Primary and secondary net enrolment rates have remained fairly static in recent years, although primary net enrolment fell slightly between 2007 (94.8%) and 2012 (92.7%). In 2012, secondary net enrolment was 84.1 per cent, which is also slightly lower than in 2007 (84.6%). The number of out-of-school children and adolescents has increased since 2010, following a period when these numbers fell.

Primary education



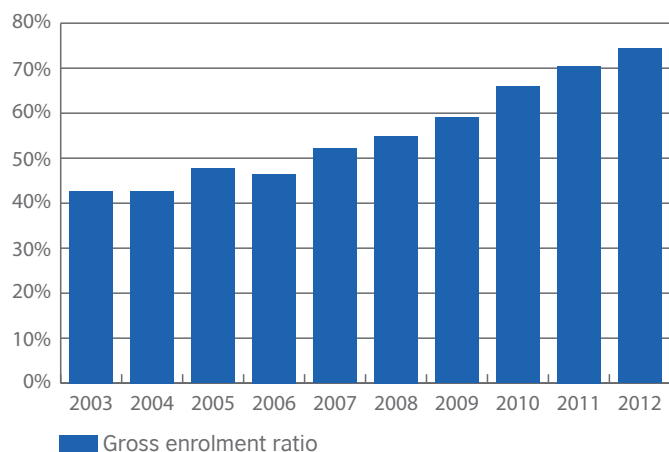
Source: UNESCO

Enrolment in tertiary education increased sharply from around 40 per cent in 2003 to 74.4 per cent in 2012. Female enrolment rates are slightly higher than those for men and have risen faster and from a lower base. Just over a quarter of students attend 'traditional' universities, which is the group of mostly public universities that were established prior to 1980, and almost a third enrol in newer universities. The remainder is split between technical (12%) and professional (28%) institutes.

All institutions currently charge entry and tuition fees, but students are eligible for various types of scholarships and low-interest loans, depending on their circumstances. Around 58 per cent of students enrolled in 2012 benefitted from scholarships or loans, with around 35 per cent receiving scholarships and 65 per cent taking loans. The government has announced that tertiary education will be free from March 2016, with details of how this will operate in practice still to be defined.

There are many challenges facing the higher education system in Chile, despite its success in raising enrolment rates. These include: ensuring greater equity in admissions and access to financial aid for low-income students, improving the regulation and quality assurance systems without undermining autonomy, strengthening the science and technology base, and ensuring a better fit between universities and the job market.

Tertiary education



Source: UNESCO

Curriculum

Primary education consists of two cycles, and each cycle is split into different levels, called *niveles básicos*. The primary curriculum comprises eleven compulsory areas:

- language and communication
- indigenous language (compulsory in schools with a high density of indigenous students)
- foreign languages (compulsory in the second half of basic education)
- mathematics
- natural sciences
- history
- geography and social sciences
- technology
- art
- physical education
- orientation and religion (must be offered by the school but is optional for students)

Secondary students attend different types of school from the age of 14, depending on their inclinations: scientific-humanist and technical-professional. The first two years of the curriculum are the same, but the last two years differ. Those in the scientific-humanist stream can pick one subject from sciences or humanities to study at a more advanced level during Grades 11 and 12. Students in this stream gain a secondary school diploma which, together with entrance exams, is the accepted route to tertiary education. Students in technical schools choose from different pathways such as commercial, technical, agricultural and maritime in Grades 11 and 12 and gain a technical qualification; graduates are expected to go straight into the workplace.

There is a stark socio-economic divide between these streams: a report produced by UNESCO, the OECD and MINEDUC notes that around 40 per cent of students are enrolled in technical schools and that most of these students come from vulnerable socio-economic groups.¹¹ The report also notes that the financing system for these streams is not equitable and that there is a need to align the system of degrees and grades to improve coordination with university education. UNESCO also states that the education system needs to develop a flexible and open curricular structure to respond to students' broad range of interests and needs and allow students to move from one modality to another.

Compulsory subjects at secondary level are:

- language and communication
- mathematics
- science (physics, chemistry and biology)
- history
- geography
- social science
- English
- physical education
- visual or musical arts
- technology (for the first two years)
- philosophy and psychology (for the last two years)

¹¹ "Challenges of the Chilean Education System." UNESCO/OECD/Ministry of Education. January 2010. Retrieved at <http://unesdoc.unesco.org/images/0019/001903/190330e.pdf>

Public and private provision

The market-orientated education reforms of the 1980s resulted in the decentralisation of public school management responsibilities to municipalities and the introduction of a nationwide voucher programme. The latter resulted in the proliferation of private schools and a growing share of the student population enrolling in the private sector. A very high proportion of Chilean students attend private schools, whether completely private or publicly subsidised and privately run. Private enrolment varies across the age groups; however, the 2009 PISA tests revealed that only 42 per cent of Chilean 15-year-olds attended public schools, compared to an OECD average of 82 per cent.¹² Funding from public sources amounts to 72 per cent of total education expenditure, compared with an OECD average of 85 per cent.

The way that subsidies operate has changed over the years from a flat-rate voucher system to a more complex subsidy and fee system. Subsidised schools have been allowed to charge fees since 1993. One of the consequences of this has been that private schools, which are allowed to select pupils, select students from higher socio-economic backgrounds, to both improve results and increase fee revenue. The result is that Chilean students are among the least likely in the OECD to attend schools with diverse student populations: according to the OECD, less than 50 per cent of the variance in socio-economic status in Chile is evident in schools, meaning that students do not reap the short- and long-term benefits of social diversity as they are less likely to mix with young people from different socio-economic backgrounds. This variance level is lower than the OECD average (74.8%) and is significantly lower than in countries such as Finland and Norway, where more than 89 per cent of socio-economic variation is visible in schools.¹³

The OECD also notes that while private schools tend to achieve better results, when adjusted for socio-economic factors, the difference is very small. Changes to the subsidy system in 2008 attempted to improve equity by offering higher subsidies to schools that admitted pupils from disadvantaged backgrounds under the Preferential Subsidy Scheme (SEP).¹⁴ The schools that participate in the SEP must have programmes in place for academic improvement and cannot select pupils based on ability or background or charge additional fees. Although participation is voluntary, the strong financial incentive has resulted in a high rate of engagement: all municipal schools and 66 per cent of private subsidised schools, or 85 per cent of all schools, participate in the SEP.

Pupils by type of school

TYPE OF SCHOOL DEPENDENCY	PUPILS (2014)	%
Delegated administration	46,880	1.33
Private, non-subsidised	270,085	7.64
Private, subsidised	1,913,838	54.13
Municipal (public)	1,305,032	36.91
Total	3,535,835	100.00

Source: Ministry of Education

According to the OECD, transition to work is a challenge for young Chileans: 22 per cent of those aged 15-29 were neither employed nor in education or training (NEET) in 2011. This percentage is in line with that in OECD countries such as Turkey (35%), Israel (28%), Spain (24%), Italy (23%) and Mexico (23%). The proportion of female NEETs is particularly high, at 30 per cent: the third highest percentage among OECD countries.

While youth unemployment fell over 2011-2013 from 17.6 per cent to 16.1 per cent, the rate remains considerably higher for young women (19.2%) than for young men (13.9%).

¹² "Public and Private Schools: How Management and Funding Relate to their Socio-economic Profile." OECD. 2- April 2012. Retrieved at <http://dx.doi.org/10.1787/9789264175006-en>

¹³ "Chile Education at a Glance 2014." OECD. 2014. Retrieve at <http://www.oecd.org/edu/Chile-EAG2014-Country-Note.pdf>

¹⁴ "OECD Education Policy Outlook, Chile." OECD. November 2013.

Government policy on English language learning

Historical initiatives

In the past, English proficiency was limited to a narrow elite educated at private schools. A reform of the modern languages curriculum in 1998 suggested that 'knowledge of English should be considered an essential skill for facilitating international communication, accessing information, participating in information networks, and engaging in commercial exchanges'.¹⁵ Under this reform, MINEDUC specified teaching objectives for primary and secondary schools (i.e. Grades 1-12). These objectives became mandatory in public schools. The revised English curriculum listed fundamental objectives for each of the years in which English was a compulsory subject: from the last two years of primary school (Grades 7 and 8) to the final year of secondary school (Grade 12). MINEDUC argued that curriculum design should reflect the role of English in the world, the scope of global communication networks, the geographical and regional characteristics of Chile and the demands of the evolving Chilean labour market.

The major curriculum change under this reform was the emphasis on receptive skills (reading and listening) rather than productive skills (speaking and writing): 40 per cent of the English curriculum was devoted to reading comprehension, 40 per cent, to listening comprehension, and 20 per cent, to speaking and writing. The rationale was that for most Chileans, English would predominantly be used to access the growing amount of (often technical) information available in that language and that English was needed mainly to participate in the global economy and information network.¹⁶ This approach has been criticised as treating English as a one-way means of communication - from the more advanced, outside world to Chileans - rather than acknowledging potential Chilean contribution to the world. Nonetheless, MINEDUC has tried to localise English language learning and integrate it more fully into national culture by creating its own curriculum, *Go For Chile*, which uses settings and learning materials based on Chilean situations and experiences.

A test in 2004 of a representative sample of 1,000 students from 299 schools (in Grades 4 and 8) revealed that while there was progress between primary and secondary school, only five per cent of students had reached B1 on the Common European Reference Framework (CEFR) scale. This test became the benchmark for future progress.

In late 2014, the government published an English Policy paper that indicated the need to develop English levels not only as part of the education system but also as a tool for economic prosperity. The trade development agency CORFO offers an English scholarship programme for adults in specific industries to help improve national economic competitiveness. The scholarship was launched in 2008 and has since benefited more than 10,000 individuals as well as cooperating English language providers.

English Opens Doors programme

In 2003, MINEDUC launched a programme as part of an agreement with the United Nations Development Programme (UNDP) called Programa Inglés Abre Puertas (English Opens Doors Programme, EODP). Tentative reforms towards English language teaching and learning began in 1993, and a major reform in 1998 lowered the learning age for English from Grade 7 to Grade 5. The EODP was originally designed to run until 2012; however, it has since been extended. To date, it is the only programme in Chile to focus on a single school subject. The EODP also covers English in higher education.

Funding for the programme has increased more than fivefold since it began in 2003 to over US\$5 million today. The programme was created with economic development in mind and reflected the severe lack of English language skills among the population. Overall, the EODP aimed at 'improving national economic competitiveness and promoting equity by extending English language learning to all students in publicly funded schools' and to 'improve the level of English of students from Grades 5-12 through the definition of national English learning standards, a teacher training strategy, and classroom support for Chilean teachers of English'.¹⁷ While the programme targets schools and young people, it has the much broader goal of raising the English proficiency of the nation so that every citizen has at least a degree of fluency in English. This initiative goes hand in hand with Chile's plans to integrate more fully with the global economy, as signalled by the recent signing of numerous free trade agreements.

In 2012, the EODP aimed to 'complete the cycle' of English language teaching and learning by addressing initial teacher education for English pedagogy students. While the programme used to come under the Curriculum and Evaluation Unit (UCE) it is now overseen by the General Education Division (DEG).

¹⁵ Matear, Ann. "English language learning and education policy in Chile: can English really open doors for all?," *Asia Pacific Journal of Education* 28.2 (2008): 131-147.

¹⁶ McKay, Sandra. "Teaching English as an international language: The Chilean context." *ELT Journal* 57.2 (2003): 139-148.

¹⁷ Matear, Ann. "English language learning and education policy in Chile: can English really open doors for all?," *Asia Pacific Journal of Education* 28.2 (2008): 131-147.

Programme goals

The EODP meant that children would learn English from an earlier age (Grade 5) and for longer (until Grade 12). The number of teaching hours in English would be increased to three per week, and students would reach A2 by the end of Grade 8 and B1 by the end of Grade 12.¹⁸ These targets were set deliberately high levels.

ITEMS	TYPE OF SCHOOL		
	Municipal	Subsidised	Private
Grade in which students begin to study English	Grade 5	Grade 5	Pre-school
Number of pedagogical hours of English	2-3 hours per week	2-3 hours per week	4 hours or more
Percentage of teachers who teach English in English	3%	5%	28%
Participation in English classes outside school	8%	11%	31%

Source: Ministry of Education

National English learning standards

LEVELS	STANDARD
Primary education Grades 5-8	A2 in CEFR
Secondary education Grades 9-12	B1 in CEFR
In-service teachers	B2 in CEFR
New standard for initial teacher education	C1 in CEFR

Source: UNESCO Institute of Statistics

In-service teachers have undergone diagnostic testing and received professional development, including teacher training programmes, immersion camps, refresher courses and additional certification, to help achieve B2 level.

English teaching was reformed from within with the help of primary and secondary school teachers, who used their knowledge and experience to design new courses. They were supported in this by foreign experts and expanded their knowledge by visiting overseas institutions, attending seminars and workshops and observing teachers at work. As a result, a shift was proposed in the approach to English teaching away from teaching English in the mother tongue (Spanish) and towards the communicative style found in British and North American textbooks.

By increasing funding to public schools, the EODP aimed to make English language learning accessible to all. There is a widely held belief that the private sector is leading the way in English language training; however, the majority of Chileans in managerial positions learned English at school or university (83%) while just 26 per cent studied at a private institute and 19 per cent studied independently. Promoting English language learning is part of a wider reform to increase access to quality basic education in public schools.

¹⁸ English Opens Doors, Ministry of Education presentation.

Support to achieve milestones

To support English as a Foreign Language (EFL) teaching, volunteering initiatives were created. The National Volunteer Centre was formed as part of an agreement with the UNDP to place native English-speaking volunteers in public and state-supported schools. These volunteers supported Chilean English teachers in the classroom by providing additional listening, comprehension and oral production activities. Since 2004, almost 1,000 such volunteers have been placed in Chilean schools. These volunteers must meet strict criteria and may remain in Chile to teach if they have suitable qualifications.¹⁹

Primary and secondary students have been incentivised to engage with English through winter and summer camps as well as competitions such as spelling bees, public speaking and debates. Similarly, the government is awarding scholarships through the EODP for undergraduates that study teaching English as a foreign language. These trainee teachers may improve their language and methodological competencies abroad for a term before returning to Chile to teach in government schools for at least two years. The EODP has also offered winter and summer retreats for English teachers since 2012 and provides seminars for heads of university English teacher training departments with support from the British Council.

Challenges for the EODP

The EODP is targeting English language teaching and learning from all angles in an attempt to dramatically improve proficiency. However, by 2010, after the programme had been running for six years, the results of the TOEIC bridge test showed that just 11 per cent of Grade 11 students had reached A2 level in English - the target for students in Grade 8. While this was a significant improvement on the five per cent seen in 2004, it highlighted that the government was far from reaching its target of all Grade 12 students at B1 level by 2013.

The EODP faced - and continues to face - numerous challenges. The most significant of these is that the EODP was implemented against a backdrop of a broader education crisis: there was already a need for widespread education reform when the EODP was created. As such, the education system was already battling fundamental challenges such as inequality in access to education, variable education quality and a shortage of qualified teachers, particularly in rural areas. To overcome this, the government began to offer incentives for rural schools to implement the programme and continued with its broader plan to build more schools and train more teachers.

Funding remains a significant limiting factor. Under its education budget, the government funds only the minimum number of teaching hours. Any additional teaching hours must be met by schools themselves. As English language programmes, and particularly new programmes, require a significant time investment, it is mostly the schools that are heavily subsidised or receive alternative funding, such as from a corporation, that are able to spare the teaching hours for English language teaching, teacher training and course development. Large class sizes and significant numbers of poorly trained teachers also mean that while the allotted teaching hours under the EODP should be sufficient, this is not the case in practice. Schools with fewer resources are also less likely to be able to attract competent foreign language teachers.

While the EODP has focused on schools with a higher proportion of disadvantaged pupils, there is still a severe imbalance in English learning outcomes between affluent and deprived areas. This stems largely from the fact that children who are able to attend private schools and preschools are likely to start learning English much earlier and receive significantly more English teaching hours. The education divide has deepened as the private education sector, which also offers varying quality provision, has proliferated. The government estimates that around US\$15 million is spent each year on English language training. This comes from individuals or their employers as well as through the National Training and Employment Service (SENCE), which allows companies to offset some of their training costs against taxes. As such, the EODP is battling the perception that English language training is something achieved at cost and within the private sector.

Awareness has also been a barrier to implementation: some schools' English coordinators remain unaware of the EODP initiative. Among schools that are aware of the programme, teacher responses have been mixed: while some are grateful for the opportunity, others feel that the programme is an imposition. Teachers already face low wages, long working hours, large class sizes and few incentives to improve or invest more energy. Among teachers disinterested in or opposed to the EODP, diagnostic testing was initially met with some hostility, and poor communication meant that there was uncertainty about the future for teachers whose English was below the required B2 level. Overall, low teaching quality remains an issue, as do low teacher confidence in their English, passive learning methods and a lack of emphasis on or enthusiasm for English among teachers in the classroom. There is also reluctance among some teachers to commit to a career in the public system, reflecting generally higher salaries and greater access to resources in the private sector.

¹⁹ "Bridge Recruits and Trains Teachers for the Chilean Ministry of Education." Bridge Education Group. Retrieved at <http://www.bridge.edu/Case-Studies/teacher-training-case-study-english-opens-doors-program/>

Universities have a high degree of autonomy and remained largely outside MINEDUC's loop when it came to the EODP. As a result of the lack of dialogue on curriculum and teaching methods between universities and MINEDUC, the teachers produced by universities do not always meet the Ministry's specifications. Similarly, MINEDUC commissioned the development of a set of standards for the initial training of English teachers. This resulted in concern among universities that the standards were unattainably high: the new specifications meant that teachers were required to be at C1 in English. They were also concerned about the INICIA language diagnosis introduced for fifth-year trainee teachers, although this situation has since improved.

The resources provided by the department charged with buying English textbooks have also been a cause for concern, with some schools reporting quality issues. Traditionally, schools and teachers have chosen their teaching materials from among well-known international publishers such as Pearson, Longman, Cambridge, Oxford and Heinemann. Course-writing within Chile is still in its early phases, and the curriculum is being reviewed through pilot progress maps in Santiago and some rural areas. In the meantime, some schools continue to choose their own materials without considering or knowing about MINEDUC publications.

Outside of teachers, some opponents of the EODP continue to have a negative attitude towards English. The main objections remain the perceived imperialism of English, the disappearance or diminished importance of native languages, increasing socio-economic inequality and the neglect of other academic subject areas. Others feel that English is not needed by everyone, although it is naturally impossible to discriminate between which students should learn English and which should not. Teachers remain challenged by the shy nature of many Chileans, which makes it hard for students to learn a new language for fear of embarrassment. However, just three per cent of the non-learners in our survey reported having no interest in learning English, and borrowing from the English language is common in everyday and business conversations, indicating that there is a general openness to the language.

The future of the EODP

Under the new EODP, which is overseen by the GED, the focus has been narrowed to municipal schools in 15 regions. Within these regions, MINEDUC, together with local authorities, has identified institutions where a real difference can be made. As such, the focus has been raised from the teacher level to the school level. These schools will be largely exempt from other regional and national programmes, allowing them to focus on English language teaching and learning.

Despite the challenges, the ambitious government policy has taken positive steps towards increasing public engagement with and motivation for learning English. Through the EODP, people have become more aware of the need for a foreign language and the potential barriers faced by those who don't speak English. Based on the number of Chileans interested in learning English and the number of university students studying to become English teachers, EODP has largely been perceived as positive and effective.

Teaching training

Overall, the teaching profession is not well respected in Chile, and as a result, teachers are generally not drawn from among the highest-performing students, even though the vast majority of teachers (95%) have a bachelor's degree. The scores required for teacher training programmes are not high, and teaching programmes are comparatively long, at five years. When training is completed, teachers are not required to pass a professional examination or to have gained any practical teaching experience, and the high degree of autonomy held by universities means that curriculums, quality measures and learning outcomes are often not standardised.²⁰ Teacher training courses must now be accredited.

When entering the teaching profession, new teachers are faced with long hours, extracurricular obligations, additional duties outside their remit and overcrowded classrooms, with primary school class sizes the second largest among OECD countries, at 29 students per class, and one of the highest ratios of students to teaching staff: 23 students per teacher compared to an OECD average of 13 to one. Salaries per teaching hour are also below the OECD average: an upper-secondary teacher with 15 years' experience earns US\$26,195 a year, compared to an OECD average of US\$42,861. Chilean teachers also have the highest number of statutory working hours in the OECD, with teachers at all levels teaching up to 1,103 hours a year compared to OECD averages of 1,001 hours for pre-primary level, 782 for primary level, 694 for lower-secondary level and 655 for upper-secondary level.²¹ Teachers also report low levels of support, and a culture of continuous professional development is still in its infancy: teachers are more likely to pursue additional teaching jobs in their limited spare time than invest in further training.

In addition, teachers with postgraduate qualifications generally earn the same salary as those with a bachelor's degree, meaning that there is little incentive for postgraduate degree-holders to enter the teaching profession or for those interested in teaching to pursue postgraduate qualifications. There are stark comparisons, too, with the broader workforce: Chilean upper-secondary teachers earn around three-quarters of what other tertiary-educated full-time workers earn; this is low compared with an average salary gap of 92 per cent in OECD countries. In addition, 20 per cent of Chilean primary teachers are under the age of 30, compared to just 13 per cent in OECD countries.²²

These factors have resulted in a severe shortage of qualified teachers as well as teachers per se. Addressing these issues has been the focus of various programmes and reforms. However, strikes and disparagement continue, and in November 2014 there was a major strike by the teachers' union over pay and working conditions, with demands that employment benefits be included in education reforms.²³

English teachers are generally more respected than other teachers, and their short supply remains one of the main barriers to English language learning in Chile. However, some teachers note that students enter English teacher training programmes not so much because they want to teach but because they like the English language.

Teachers are required to have a minimum of a First Certificate in English (FCE) to teach Grades 8 to 12, although this is not always the case in reality. Some teachers have limited opportunities to speak English, and this has resulted in the widespread teaching of English using the mother tongue (Spanish). However, the situation is improving: to date, 5,171 teachers have been assessed with the Cambridge Placement Test (CPT), of which 67 per cent were at B2, 21 per cent were at B1, nine per cent were at A2 and just three per cent were at A1.

Even teachers who are proficient in English may lack the skills and training to teach the subject effectively. Teachers generally study English pedagogy as part of their teacher training. These courses are plentiful as they are generally inexpensive to run, and all of the country's 35 private universities teach English pedagogy. However, there remains a shortage of experts in this field; there are no Chilean TEFL journals, and the lack of standardisation or cooperation between autonomous universities and MINEDUC means that there is little consensus on teaching methodology. As such, general and EFL teachers often graduate with little knowledge of how to teach and manage the diverse populations within many public schools effectively, and they often rely on rote learning, memorisation and grammar exercises to fill lesson time. In addition, schools that offer English voluntarily at primary level often fill teaching positions with secondary school teachers; this is significant as our survey findings show that 51 per cent of English learners began learning the language at primary level. In addition to moonlighting, these teachers are using methods that may not be suitable or effective for younger learners.

A raft of measures has been put in place to address quality concerns in English language teaching, including training for new entrants, conversion and specialisation for existing teachers, continuous professional development, workshops, local teaching networks, English language and teaching methodology courses, mentoring, and links between higher education institutes and schools. Teachers can also participate in study trips to English-speaking countries as well as the English

²⁰ "Teacher training in Latin America." *Education International*. Retrieved at http://www.ei-ie-al.org/publicaciones/formacion-ing_web.pdf

²¹ "OECD Education Policy Outlook, Chile." OECD. November 2013.

²² "Chile Education at a Glance 2014." OECD. 2014. Retrieve at <http://www.oecd.org/edu/Chile-EAG2014-Country-Note.pdf>

²³ "Chilean Teachers on Strike." *Pan Am Post*. 24 Nov 2014.

Summer Town, an immersive continued professional development event for teachers and students.²⁴ As the government is aiming for all teachers to reach C1, an accreditation system for universities teaching English pedagogy is being implemented, and government-led teacher training and support has been made a government priority. These teacher training programmes include 60 hours of on-the-job pedagogical training for teachers teaching Grades 5 to 12 as well as training on how best to use the recommended textbooks. While early training programmes failed due to a lack of follow-up and short course duration, these programmes have since developed and their success has increased.

Without effective teacher training and ongoing diagnostic testing as a quality measure, English language provision in public schools is likely to continue to suffer from quality issues, perpetuating the cycle of low English proficiency.

Public sentiment

There has been opposition to the government's promotion of English, including fears that overemphasising English may help extinguish indigenous languages and reduce access to world cultures by marginalising other foreign languages. However, criticism has been largely pragmatic, focusing on whether children need a better grounding in Spanish at a young age before embarking on learning English. The previous Bachelet administration instituted some indigenous-medium schools and has now added Mandarin Chinese to the EODP. In addition, for many the issue of equality is more important than cultural sensitivity, meaning that many parents from lower socio-economic backgrounds have welcomed the opportunity for their children to learn English, as they see it as something that was previously limited to the elite and could better equip their children for the workplace.²⁵

A survey in 2004 found that 90 per cent of secondary students considered it important to learn English in school and 85 per cent said that they were keen to do so. Students connected having language skills with better employment prospects, and there was strong support from parents and teachers, who largely considered English to be an important skill for future educational and career development (93% and 88%, respectively).

A small-scale study of the attitudes of higher education students in Santiago towards learning English and its connection with both national development and personal opportunities confirmed the generally positive view of English language learning. However, there was also considerable concern that the existing programme was inadequate in quality and, in particular, that overall inequality in the education system was the most important problem, although this problem cannot be separated from the issue of English language acquisition.²⁶

One English teacher in the higher education sector who trained English teachers and undertook a research project into English language learning in Chile initially believed that the lack of motivation and commitment shown by many of her students was a result of cultural factors, such as belief that English was the foreign language of the wealthy or that the country's geographical position and the lack of opportunity for travel outside Latin America made English unnecessary; however, she later reported that the situation was more complex.²⁷ Part of the problem, she came to believe, was the unsuitability of the school curriculum, particularly the irrelevance of learning materials, and the poor quality of English teaching in schools. A further factor was the close relationship between the drive to acquire English and a rather crude instrumentalism: looking for quick results for limited purposes.

²⁴ "Teachers and students of 14 cities fully engaged in intensive English workshops." Embassy of the United States. 9 Jan 2014. Retrieved at http://chile.usembassy.gov/2014press0109-english_summer_town_eng.html

²⁵ "Learn English, says Chile, thinking upwardly global." *New York Times*. 29 Dec 2004.

²⁶ Byrd, Kortnee. "Reactions to English Language Learning in Chile as a Means for Personal and National Development." (2013).

²⁷ Glas, Katharina. "Teaching English in Chile." Peter Lang Edition. Retrieved at http://www.peterlang.com/download/extract/72883/extract_262916.pdf

English language learning analysis

Macro evaluation of English learners

Spanish is the official language in Chile, where it is spoken in a distinct manner and with an accent that does not differ greatly between regions, reflecting the historical concentration of the population in the centre of the country and the high degree of urbanisation. Several indigenous languages are spoken, including Quechua, Aymara and Mapudungun, although the prevalence of Spanish means that use of these languages is decreasing. Despite the country's relative prosperity and the general understanding that English is becoming increasingly important, English levels are perceived to be low overall. There is no official data on English language proficiency in Chile. However, at the 2012 census, just 16 per cent of young Chileans could communicate in English, and at the last national SIMCE English test under the EODP, which tests Grade 11 students, 82 per cent failed to reach B1.

Public education

Public education is generally regarded to be of lower quality than private education. The poor quality of public education is seen as a contributing factor for Chile scoring significantly below the OECD average in student learning outcomes. While academic performance appears to be improving, there is still a marked correlation between a socio-economic status, the type of school attended and learning outcomes, as enrolment in different types of school is dependent on household income. UNESCO reports that in 2012, enrolment in public education at all levels was as follows:

Enrolment in state-run schools, 2012

Pre-primary education, public institutions	186,106
Primary education, public institutions	598,339
Lower-secondary education, public institutions	226,397
Upper-secondary education, public institutions	345,630
Total secondary education, public institutions	572,027

Source: UNESCO UIS

As noted, the education system in Chile is complex, with a high degree of private involvement that has developed since the 1980s. The UNESCO figures above refer to publicly owned and managed schools; however, from the point of view of English language learning, there is no real difference between schools that are publicly owned and those that are publicly subsidised but privately managed. Elite schools that are privately owned and privately managed account for 7.6 per cent of enrolments, meaning that the vast majority of Chileans receive comparatively low-quality education.

In public (as well as privately managed subsidised) schools, large classes, long teaching hours and teacher training concerns, particularly in terms of competence and qualifications in English, have negatively affected English language learning. As such, the quality of English teaching at these schools is largely not seen as being effective for boosting English proficiency. Large class size is perhaps one of the biggest challenges for public school teachers, who often teach students with little to no previous experience with the language or exposure to native English speakers.

English teachers at public schools are often graduates of the public school system and tend to lack a vital connection to the language: 'The teachers are the same as the children,' said one school administrator. A university professor reported that even if the focus changes to improving teacher training and methodologies, the lack of English ability would remain the biggest problem with lifting overall levels in the public system: 'Graduating thousands of English teachers with poor English is a waste of time'. Since the parents of public school students often do not speak English themselves, these students may lack support and encouragement in language learning, including knowing the importance of being able to speak another language.

The EODP is attempting to tackle these problems proactively, for example, through continuous professional development; however, the fundamental issue remains that many students, and students from lower socio-economic backgrounds in particular, face difficulty accessing quality education at all, let alone in terms of quality English language training.

English language provision in TVET schools is less well established. While MINEDUC has stated how much English should be taught in the TVET system, this is a guideline, unlike the strict rules that apply to the rest of the curriculum. A quality assurance expert in the TVET sector reported that the curriculum stipulates a minimum of two hours of English a week, although some schools may offer more than this. As TVET students come directly from the public primary school system, they often begin Grade 9 with extremely limited, if any, English ability. As a typical English class in the TVET sector may contain 45 students, teachers also experience issues with class sizes, and quality concerns in this segment are similar to those in general public education.

In addition, TVET students, who study specific fields such as industrial mechanics and chemical plant operations, often do not have a powerful incentive to learn English as they cannot see the demand for it in their future careers: the ability to read a manual in English was often cited as a common benchmark for TVET students.

Private education

In elite private schools, English is taught much earlier, often from pre-school level, and for at least four hours per week, with the aim of creating graduates who are prepared for the global marketplace. Enrolment in private schools is shown in the table below; however, this data also contains enrolments in government-subsidised, privately managed school, where English teaching takes place from Grade 5 for two to three hours per week.

Enrolment in privately managed schools, 2012

Pre-primary education, private institutions	386,940
Primary education, private institutions	905,559
Lower-secondary education, private institutions	278,221
Upper-secondary education, private institutions	593,306
Total secondary education, private institutions	871,527

Source: UNESCO UIS

A better picture of enrolment in elite private institutions is given by the government statistics below, under 'private, non-subsidised':

Pupils by type of school, 2014

TYPE OF SCHOOL DEPENDENCY	PUPILS (2014)	%
Delegated administration	46,880	1.33
Private, non-subsidised	270,085	7.64
Private, subsidised	1,913,838	54.13
Municipal (public)	1,305,032	36.91
Total	3,535,835	100.00

Private expenditure accounts for around 40 per cent of total education expenditure and as much as 76 per cent of spending on tertiary education. Monthly household spending on education is around ten times greater in the richest households than in the poorest households, although richer households spend a smaller proportion of income on education.

There are a wide range of private schools, including top-end schools that cater mainly to expatriates, whose employers may cover the cost, as well as the Chilean elite. Many of these schools follow the International Baccalaureate (IB) programme, although some offer American or British, as well as French or German, curriculums. Most high-end private schools are found in Santiago, with a small number in the northern cities. High-end school fees vary between US\$500 to US\$1,200.

Parents opt for private schools as they perceive the quality of education to be higher and also because English - which retains some social status appeal - is taught from an earlier age. Private schools can afford to hire teachers who are native English speakers, and class sizes are smaller, meaning that teachers and students are more engaged.

Government-subsidised private schools are believed to offer higher-quality education than the public system at a much lower cost than completely private schools. As such, these schools may be desirable for aspirational middle-income households but out of reach for lower socio-economic groups. The rapid proliferation of private schools in recent decades has resulted in inconsistent quality standards, meaning that parents may be exerting themselves financially for education that is sub-par or in line with that in the public sector: one university professor reported that 'people pay through their teeth to have their children in subsidised private schools, but there is no quality assurance mechanism'.

The ongoing reforms and the removal of these subsidies is expected to have a significant impact on the private sector, as schools will be forced to become either entirely private or entirely public: 'This is a real unknown and there is a feeling of insecurity', said a school administrator. 'A radical change will take place here, but its still early days'.

English in higher education

Enrolment in tertiary education has risen sharply in recent years to 74.4 per cent in 2012, and enrolment is higher among women than among men. However, graduation rates are significantly lower. Eight 'traditional' universities, which existed prior to 1980, and 17 derived institutions, which are effectively faculties that were upgraded to independent institutions after 1981, receive government funding.²⁸ Most universities are located in major cities, such as Santiago, Concepcion and Vina del Mar, but have regional campuses.

Types of tertiary institutions

CLASSIFICATION OF HIGHER EDUCATION INSTITUTIONS	
Type of institution	Degrees offered
<i>Centro de formacion tecnica</i> (technical training centres, 69)	Two- to three-year técnico (technician)
Instituto profesional (professional institutes, 45)	Titulo profesional (professional qualification) and categories above
<i>Universidad</i> (universities, 60)	<ul style="list-style-type: none"> • Titulo profesional, licenciado (undergraduate) • Magister, doctor (graduate) and all categories above

Source: WENR

Admission to 'traditional' universities is based on scores attained in the University Selection Test (*Prueba de Selección Universitaria*, PSU), which has four parts: language and communication, science, history and mathematics. The PSU is used by 33 universities, while a secondary school diploma is sufficient for some of the newer private universities. There are no standardised entry requirements beyond the diploma and PSU test as well as some specialist tests for degrees such as medicine, drama and architecture.

Professional institutes award *titulo profesional* (professional qualifications), while technical training centres award *técnico de nivel superior* (senior technician) qualifications.

There are concerns about whether the expansion of higher education has been accompanied by sufficient attention to quality and also whether pedagogy and resources have adapted to the different students now enrolling in higher education, who are often the first in their families to go to university and may be ill-prepared compared students from established academic families.

²⁸ "Higher Education in Chile." *World Education News and Review*. 6 Dec 2013.

Enrolment in different tertiary institutions

CLASSIFICATION	STUDENTS (2013)	%
Technical training centres	144,383	12.2
Professional institutes	332,488	28.1
Traditional universities	326,040	27.5
Non-traditional universities	381,894	32.2
Total	1,184,805	100.00

Source: Ministry of Education

All institutions charge entry and tuition fees, but students are eligible for various scholarships and low-interest loans, depending on personal circumstances. Fees vary by programme and the status of the institution and are as high as US\$700-1,000 per month at the top universities. As such, fees at top institutions are high compared with per capita income. Fees are much lower for shorter, vocational courses. Fees are very high in international terms. Universities received very little state funding during the 1970s and 1980s under the military dictatorship, leading them to increase fees and reduce admissions. From the 1980s, private universities were encouraged to cater for unmet demand and create a free market for education. As undergraduate programmes typically last six years, compared with just over four years on average in the OECD, there are additional time-related costs to higher education in Chile.

The military dictatorship also introduced a loan scheme with fixed low interest rates, income-based repayments and an automatic write-off after 14 years. These loans were only available for study at the traditional public universities. Since 2006, this has been supplemented by a separate loan scheme to assist the increasing number of students enrolled in private universities and other tertiary institutions. These schemes are run by commercial banks and have higher interest rates and no repayment limits.²⁹ In 2012, around 58 per cent of students benefitted from scholarships or loans, with around 35 per cent gaining scholarships and 65 per cent taking loans.

Concern about fees has risen, particularly as the wage premiums for tertiary graduates have fallen. High fees and expensive loans for private university students fuelled the mass protests that led to the government's pledge to make higher education tuition-fee free from March 2016.

While cost is a barrier for some, the major obstacle to university entry is access to quality basic education that will allow students to pass entrance examinations. As noted, a large share of secondary students attend technical schools; this largely precludes them university study, although they may progress to tertiary technical or professional institutions.

²⁹ Jump, Paul. "From Pinochet to Pineira, Chile's way is to make students pay." *Times Higher Education*. 5 May 2011.

Percentage of graduates by subject, 2012

Agriculture	2.4
Education	15.8
Engineering, manufacturing and construction	14.3
Humanities and arts	4.2
Sciences	4.9
Social sciences, business and law	29.4

Higher education, employment and earnings

The OECD reports that just 18 per cent of those aged 25-34 have a tertiary education; this is one of the lowest rates in the OECD, where the average is 32 per cent. Among the population aged 25-64, 68 per cent are in employment, and the employment rate increases with educational attainment: 84 per cent of adults with a university degree are employed, compared to just 59 per cent of those who did not complete upper-secondary education.

However, the OECD notes that tertiary qualifications do not necessarily offer protection against the risk of unemployment: In 2010, 5.6 per cent of those with a tertiary qualification were unemployed, compared to just 4.6 per cent of those without an upper-secondary qualification. The risk of being unemployed is significantly higher for tertiary graduates aged 25-34 (9.5%) than for tertiary-graduates aged 55-64 (3.1%). Employed adults with a tertiary education earn around 160 per cent more over the course of their lives than adults with an upper-secondary education, who in turn earn 34 per cent more than those without an upper-secondary education. According to the OECD, age is a key factor when it comes to earnings: the earning premium for tertiary education is 127 per cent for those aged 25-34 but 179 per cent for those aged 55-64.³⁰

English language proficiency is seen as vital for gainful employment. As such, universities offer English language training. However, many students have had poor experiences learning English at school, meaning that they are starting from a low base, lack motivation or have negative associations with English.³¹

The Chile Scholarship Programme (BCP) was created in 2008 to encourage overseas study for Chile's top students. The BCP offers financial support for students to earn advanced degrees at approved universities overseas. The programme's goals include fostering international linkages and cooperation and increasing the number of graduate students enrolled in advanced programmes in foreign countries from fewer than 300 in 2008 to 3,000. Students are selected based on academic performance and foreign language abilities, among other requirements.

Most research is carried out by five or six Chilean universities, but there is potential for collaboration.³² Public expenditure on research is low at around 0.4 per cent of GDP, compared to an OECD average of around 2.3 per cent. Increased English proficiency at the university level could encourage international collaboration and a more global outlook among students and faculty.

³⁰ "Chile Education at a Glance 2014." OECD. 2014. Retrieve at <http://www.oecd.org/edu/Chile-EAG2014-Country-Note.pdf>

³¹ Johnson, Christopher P. "Increasing Students' Academic Involvement: Chilean Teacher Engagement with Learners in Blended English as a Foreign Language Courses." Diss. Walden University. 2013.

³² Sanchez, Ignacio. "The challenges of higher education in Chile." *University World News*. 14 August 2013. Retrieved at <http://www.universityworldnews.com/article.php?story=20130812143615836>

Provision of private English language training

There are numerous private English language providers in Chile. Among the most popular are Instituto Chileno Norteamericano, Instituto Chileno-Británico, Tronwell, Wall Street English, Berlitz, eClass and The Language Co as well as International Center, Education First and BridgeEnglish. These providers have campuses in Santiago as well as outside the city and offer face-to-face lessons, online courses or a combination of both. There is no course standardisation among private language schools, but many teach in line with the CEFR and books and materials correlate with these standards.

While access to private English lessons is limited largely to upper- and middle-income households, demand is high and is expected to increase, reflecting low English language proficiency overall. A recent study by consultancy firm Adecco found that employees who speak English can earn up to 30 per cent more than their non-English-speaking counterparts. This study was well publicised, intensifying the focus on English for employability and potentially adding to demand.

Companies generally provide high-quality professional English training for senior executives but do not offer as much support for middle managers and non-managerial staff due to the high cost. In some companies, employees taking private language courses may be subsidised, for example, on a 50-50 basis.

Online learning may present a more affordable option. However, some industry and human resources specialists report that online learning is better suited to mature professionals as young people lack the discipline for self-study. They further feel that individuals need basic English skills before beginning e-learning and that learning English online from scratch is challenging.

Self-access English language learning

Self-access learning encompasses private channels that include blended and informal learning through radio, print and other media. The British Council estimates there are 1.3 million Chilean English learners utilising blended and informal online learning. The majority of these self-access learners use radio and textbooks; however, as Chile has the highest Internet penetration in Latin America, with an estimated 12.3 million Internet users, there may be significant potential in the online market.³³

Access to technology, % penetration*

RADIO (HOUSE-HOLD)	TV SET (HOUSE-HOLD)	CABLE/ SATELLITE TV (HOUSEHOLD)	INTERNET (INDIVIDUALS)	MOBILE SUBSCRIPTIONS (PER 100 INHABITANTS)	BROADBAND	SMARTPHONE (INDIVIDUALS)
70	88.6 (2011)	30	66.7 (2013)	134.9 (2013)	13.3 (2013)	25 (2013)

*unless otherwise stated

Sources: British Council, ITU, Budde, US Media Consulting

Internet use via mobile devices is growing rapidly: 6.6 million smartphones were sold in 2013, and use of mobile Internet continues to increase exponentially; Pew Research Center reports that 91 per cent of Chileans own a mobile phone.³⁴

SECTOR	2011	2012	2013(E)
Fixed lines in service			
Teledensity per capita	19.4%	18.8%	18.2%
Broadband			
Penetration per capita	11.6%	12.4%	13.3%
Mobile telephony subscribers			
Penetration per capita	129%	138%	140%

Source: BuddleComm based on industry data, (E) = estimate

YEAR	POPULATION	INTERNET USERS	%	GNI PER	USAGE SOURCE
2000	15,789,194	1,757,400	26.2%	\$4,600	ITU
2006	15,666,967	6,700,000	42.8%	\$4,910('05)	AMI
2008	16,454,143	7,387,000	44.9%	\$9,876('07)	AMI
2012	17,067,369	10,000,000	58.6%	\$12,280	MC

Technology is a growing force in English language learning but does not yet play a substantial role in the country's efforts to improve English levels: whether online learning is truly effective is under debate. The use of technology and desire to access more information online continue to drive demand for English, and the public is aware of online courses, such as those offered by Open English and Global English, as well as digital materials provided by the British Council and US embassy.

As in other countries, drop-out rates for online courses in Chile are high, reflecting a lack of time and commitment on the part of learners. In addition, Chileans tend to prefer face-to-face interaction and have a preference for classes conducted by brand- name institutions; similarly, fluency and pronunciation - which are necessary skills - are not focused on to the same extent in online courses.

³³ "Chile boasts highest Internet user penetration in Latin America." eMarketer. 13 February 2015. Retrieved at <http://www.emarketer.com/Article/Chile-Boasts-Highest-Internet-User-Penetration-Latin-America/1012055>

³⁴ Chandrashekar, Keerthi. "Chile, Argentina and Venezuela most prolific Latin America cellphone and smartphone users in Pew report". The Latin Post. 17 Feb 2014. Retrieved at <http://www.latinpost.com/articles/7452/20140217/chile-argentina-venezuela-prolific-latin-american-cellphone-smartphone-users-pew.htm>

International English language evaluation

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.

Listening	Reading	Writing	Speaking	Total
22	21	21	21	85

Source: Educational Testing Service

The average score for Chilean TOEFL examinees in 2013 was 85, meaning that Chileans' skills are classified as 'high' for listening, 'intermediate' for reading 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				
Listening	Reading	Writing	Speaking	Overall
6.6	6.9	6.0	6.6	6.6
GENERAL TRAINING				
Listening	Reading	Writing	Speaking	Overall
6.0	6.0	5.9	6.4	6.1

Source: IELTS

The average score for Chileans taking the general training exam was 6.1 in 2014, representing competent users with a 'generally effective' command of the language, while those who took the academic test scored 6.6 on average, which places them between 'competent users' and 'good users', following IELTS definitions. Chilean test-takers' weakest skill was writing.

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 4.5-5
A2		Less than 4

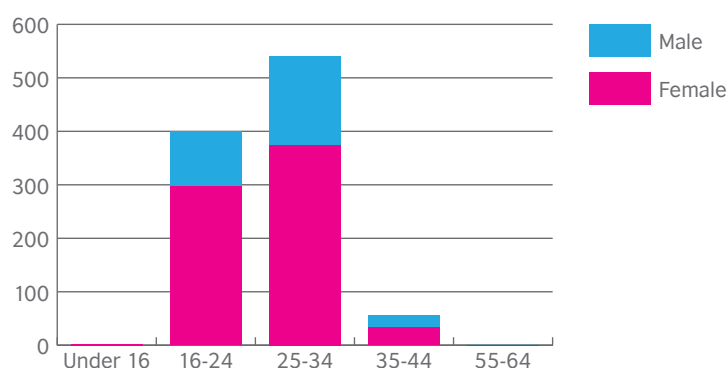
Based on Chileans' IELTS and TOEFL results, English proficiency is at a low to medium level, approximately equivalent to B2/ C1. These measures are biased due to self-selection: those taking the IELTS and TOEFL exams are likely to do so for study abroad and, therefore, have probably received more English language training and preparation than much of the general population. As such, it is not surprising that there is some variance in levels.

English learning motivations

We surveyed 1,000 Chileans to better understand their perceptions of English language learning. The survey was conducted in Spanish. 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.

Respondents

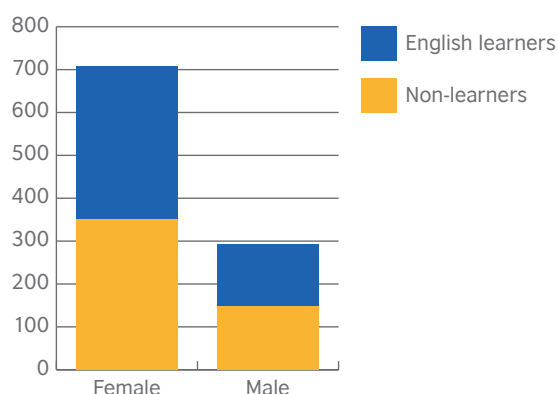
Age and gender of respondents



Source: British Council, Education Intelligence, Latin America Databank 2015

The majority of survey respondents (54%) were aged 25-34, with an additional 40 per cent aged 16-24; overall, 70 per cent of respondents were female. As such, our survey is particularly representative of the young Chilean population and young Chilean women in particular.

Gender and English language learning



Source: British Council, Education Intelligence, Latin America Databank 2015

Of the 707 female respondents, a little over 50 per cent stated that they had learned English, while the same was true for 49 per cent of male respondents.

English learners by province

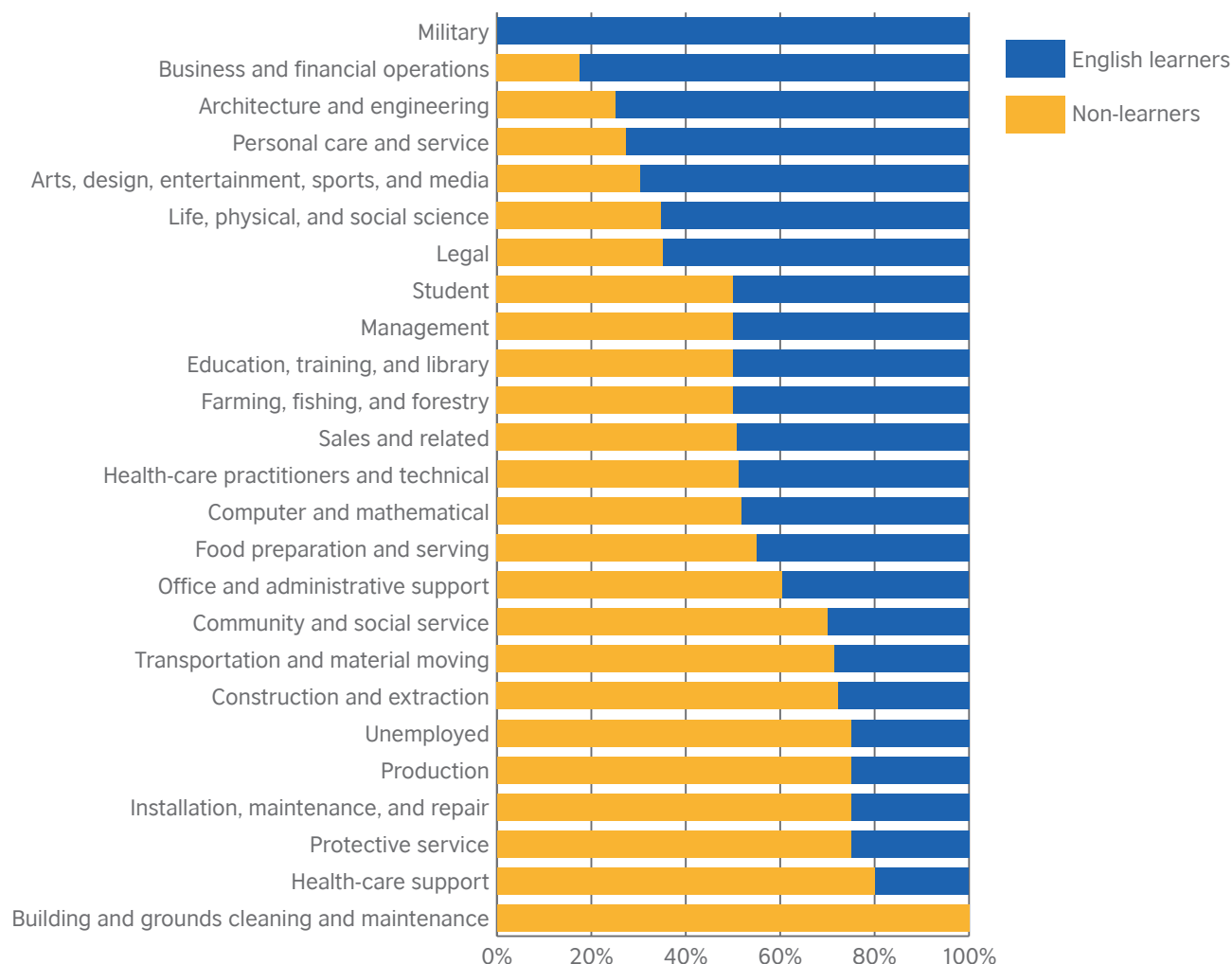
The following chart shows the English learners in our survey broken down by province. As Chile is highly urbanised and young people are often attracted to key urban areas, including the capital, for education and employment, it is not surprising that the largest shares of English learners were more urban provinces.

Province	Per cent of respondents that have learned English
Región Metropolitana de Santiago	48%
Valparaíso	11%
Bío-Bío	10%
Los Ríos	6%
Los Lagos	5%
Maule	4%
Araucanía	3%
Coquimbo	3%
Libertador General Bernardo O'Higgins	2%
Antofagasta	2%
Arica and Parinacota	1%
Atacama	1%
Aisén del General Carlos Ibáñez del Campo	1%
Tarapacá	1%
Magallanes y Antártica Chilena	1%

Source: British Council, Education Intelligence, Latin America Databank 2015

Occupation and English language learning

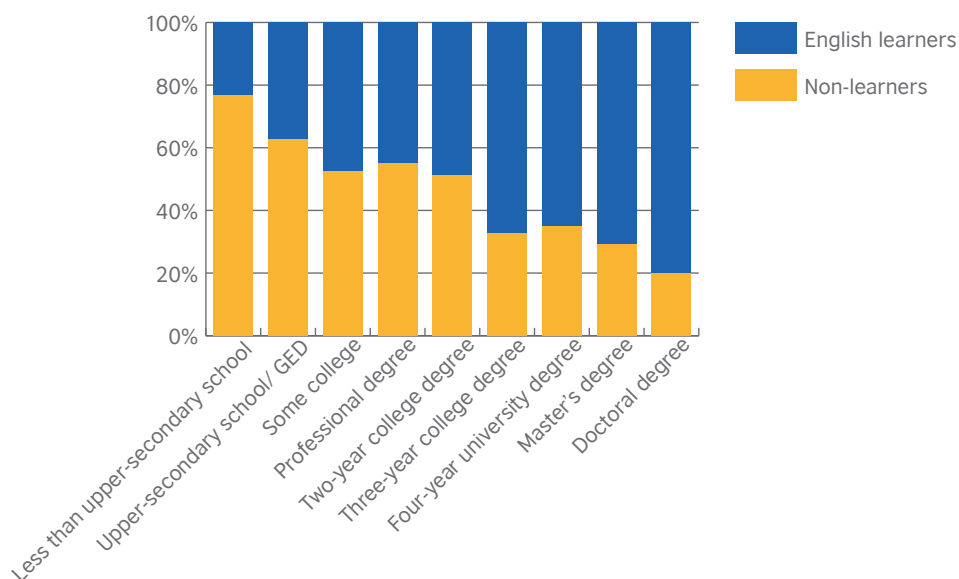
Respondents were asked to identify their occupation from a list of industries. This selection was then cross-referenced with respondents' experiences of English learning. As there was a small sample from the military, figures for this category are less likely to be representative of the sector as a whole.



Source: British Council, Education Intelligence, Latin America Databank 2015

The occupations with the highest proportions of English learners were business and financial operations (82%), architecture and engineering (75%) and personal care and service (73%). Industries with the lowest percentages of English learners included building, grounds cleaning and maintenance (0% English learners), health-care support (20%), production (25%), installation, maintenance and repair (25%) and protective service (25%) as well as among the unemployed (25%). There was a relatively even split between English learners and non-learners in farming, fishing and forestry, education, training and library, and management as well as among students. The industries with the highest proportions of English learners generally require higher levels of education and expertise, while those with lower proportions of English speakers are typically more labour intensive.

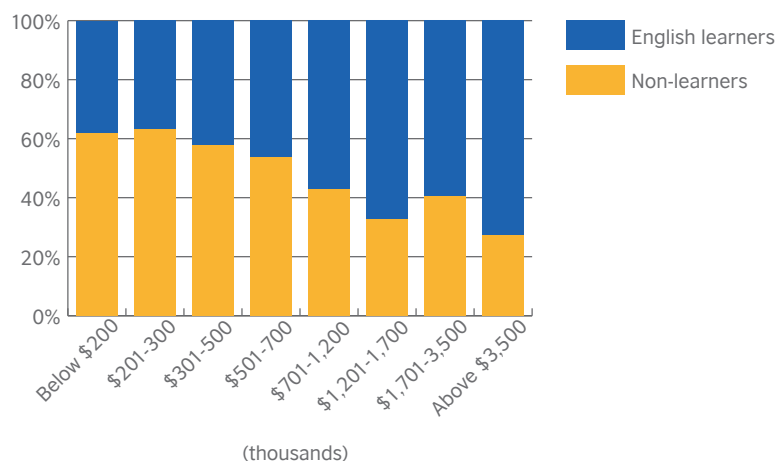
Education and English language learning



Source: British Council, Education Intelligence, Latin America Databank 2015

Respondents were asked about the highest level of education they had completed. The results showed that there is a general correlation between education attainment and English language learning: the highest proportions of English learners were among doctoral and master’s degree-holders, while the lowest levels of English learners were among those with an upper-secondary education or less. Survey respondents who had completed some college education or held professional degrees or two-year college degrees were as likely as not to have learned English.

Household income and English language learning



Source: British Council, Education Intelligence, Latin America Databank 2015

We also identified a general correlation between income and English language learning, although the relationship was less pronounced than for educational attainment. Respondents with household income of less than 700 thousand Chilean pesos (\$) were marginally more likely to be non-learners than English learners, while the proportion of English learners increased with income above \$700,000 to a high of 73 per cent for those with income greater than \$3,500,000.

Motivations for studying English

When did you study English?

During secondary school	70%
During undergraduate study	59%
During primary school	51%
While attending a private English language school	20%
While studying English for my job	6%
While participating in a government-funded programme	5%
While travelling overseas	4%
While studying/teaching overseas	2%
During postgraduate study	1%

Source: British Council, Education Intelligence, Latin America Databank 2015

We asked the 500 survey respondents who indicated that they had learned English in the past when they had studied the language and found that Chileans were most likely to have studied English at school: 70 per cent had learned in secondary school, reflecting mandatory English learning at this level, while 59 per cent had learned during undergraduate study and 51 had learned in primary school. Just 20 per cent of respondents, or one in ten of the 1,000 Chileans surveyed, had studied at a private English language school.

Less popular times to learn English included during postgraduate study (1%), while studying or teaching overseas (2%), while traveling overseas (4%) and while participating in a government-funded programme (5%), and just six per cent of English learners had learned the language through their job.

Why did you study English?

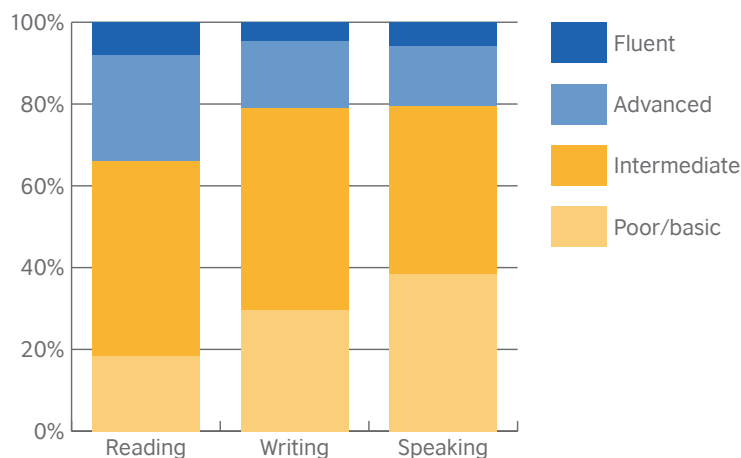
It was mandatory during secondary school	61%
It was mandatory during primary school	43%
I needed to acquire English skills for university	33%
To improve my employment prospects	29%
To be able to access more sources of information	16%
To travel	11%
To create a wider personal and professional network	7%
My parents and/or friends encouraged me to study English	7%
It was necessary for my job	7%
Other	6%
To gain social standing	2%

Source: British Council, Education Intelligence, Latin America Databank 2015

We then asked this group why they had studied English. Again, the largest shares had learned because of school requirements: 61 per cent learned because it was mandatory in secondary school, while 43 per cent said that it was compulsory in primary school. A third of respondents learned English because they needed it for university. While 29 per cent learned English to improve their employment prospects, just seven per cent learned because it was necessary for their job, indicating that some Chileans take a proactive or pre-emptive approach to learning English for the job market. Smaller but still significant groups of English learners were incentivised to learn the language to access more sources of information (16%) or to travel (11%).

English proficiency

We asked English learners to assess their English skills, choosing from Poor/basic, Intermediate, Advanced and Fluent..

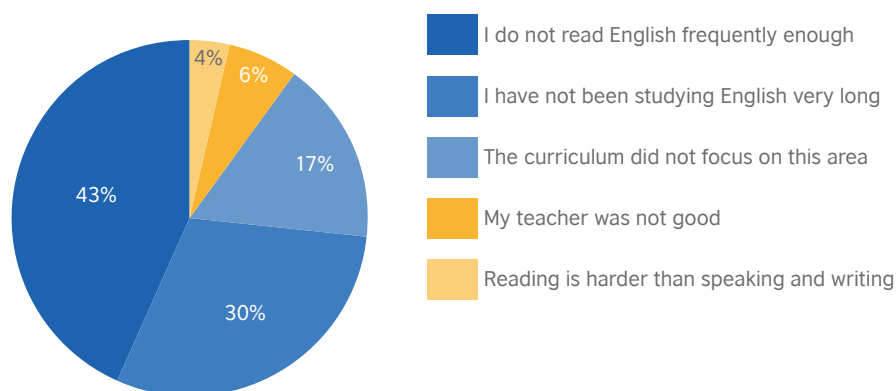


Source: British Council, Education Intelligence, Latin America Databank 2015

While this evaluation was subjective, the findings provide a useful insight into learner confidence. On the whole, respondents were least confident in their speaking skills, which 38 per cent ranked as Poor/basic. Conversely, participants were most comfortable with their reading skills, with 34 per cent ranking them as Advanced or fluent and just 18 per cent describing their skills as Poor/basic. Overall, 15 per cent of respondents described themselves as Fluent or Advanced in all three areas.

Reading skills in English

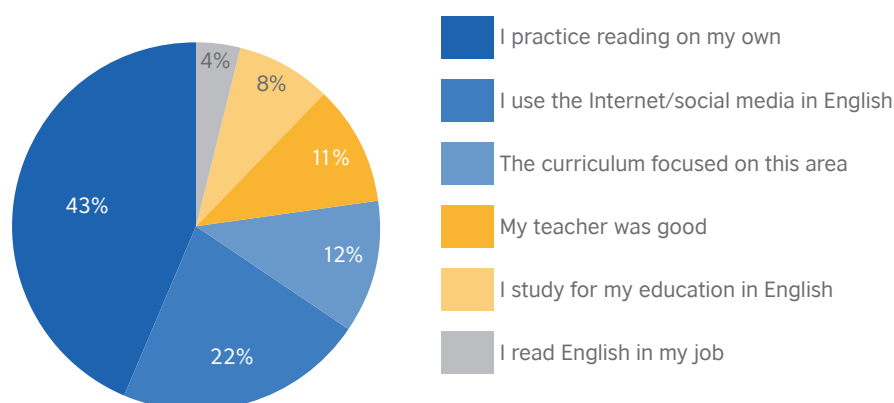
We asked respondents who evaluated their reading skills as Poor/basic or Intermediate why they felt their skills were lacking.



Source: British Council, Education Intelligence, Latin America Databank 2015

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. A further 30 per cent attributed this to not having been studying English for very long. Almost a quarter of respondents attributed their weak skills to the education system, including poor curriculum design (17%) and weak teachers (6%). A small share of respondents (4%) felt that their skills were weak because reading was harder than speaking or writing.

We then asked those with Advanced or Fluent reading skills why they felt their skills were so good.

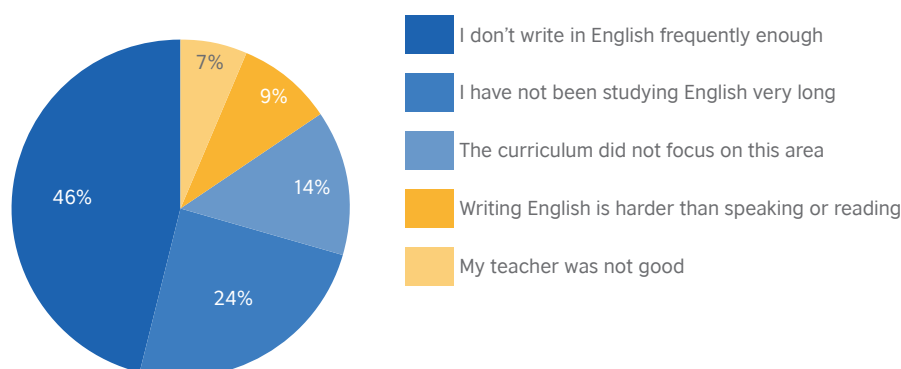


Source: British Council, Education Intelligence, Latin America Databank 2015

Overall, respondents felt that their good reading skills were largely a product of their own efforts: significant shares attributed their skills to reading English on their own (43%) and using the Internet and social media in English (22%). Much smaller shares attributed their skills to their circumstances, including having to read in English as part of their job (4%) or their academic course (8%), while 12 per cent attributed their skills to the curriculum and 11 per cent, to their teachers.

Writing skills in English

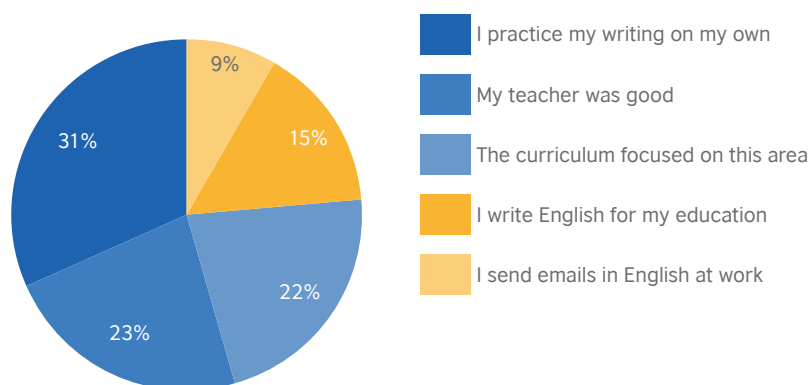
We asked respondents who evaluated their writing skills as Poor/basic or Intermediate why they felt their skills were lacking.



Source: British Council, Education Intelligence, Latin America Databank 2015

As with weak reading skills, the largest share of respondents felt that this was attributable to a lack of practice: 46 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 (24%). Smaller shares of respondents blamed their weak skills on the curriculum (14%) or their teachers (7%), and a further nine per cent felt that it was because writing English was harder than speaking or reading.

We then asked those with advanced or fluent writing skills why they felt their skills were so good.

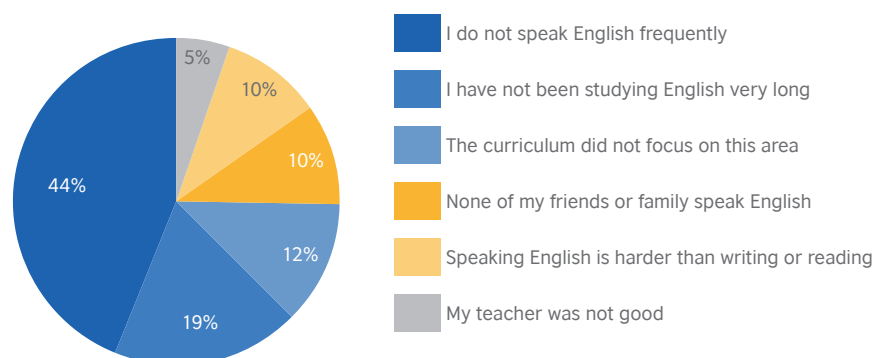


Source: British Council, Education Intelligence, Latin America Databank 2015

Again, those who were confident about their skills were most likely to attribute this to their own efforts and practice in writing English (31%). However, respondents were also more likely to attribute their skills to the education system when it came to writing: 22 per cent attributed them to the curriculum and 23 per cent, to their teachers. Smaller shares attributed this to writing in English for an academic course (15%) or their job (9%).

Speaking skills in English

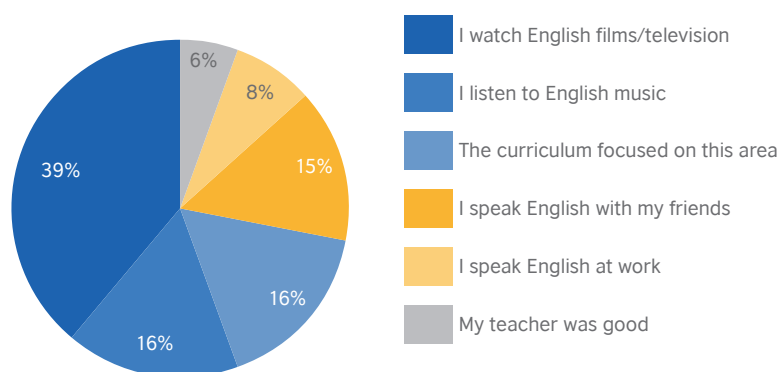
We asked respondents who evaluated their speaking skills as Poor/basic or Intermediate why they felt their skills were lacking.



Source: British Council, Education Intelligence, Latin America Databank 2015

Again, the largest shares of respondents attributed this to not using the skill frequently enough (44%) and not having been studying English for very long (19%). A small but significant share attributed their weak speaking skills to their friends or family not speaking English (10%), which further limits the ability to practise, and one in ten felt that it was because speaking was harder than reading or writing. In terms of academic factors, respondents were much more likely to attribute their weak skills to the curriculum (12%) than to their teachers (5%).

We then asked those with Advanced or Fluent speaking skills why they felt their skills were so good.



Source: British Council, Education Intelligence, Latin America Databank 2015

The largest shares of those that felt confident in their English speaking skills (Advanced and Fluent) said that it was due to social and cultural factors such as watching English language films and television (39%), listening to music with English lyrics (16%) and speaking English with friends (15%); however, just 15 per cent attributed them to speaking English at work. Only 6 per cent credited their teachers for their strong English speaking skills, while 16 per cent attributed them to the curriculum. This highlights the importance for Chileans of engaging with the English language in various aspects of life outside of education.

Barriers to studying English

Half of the survey respondents had not learned English. Of these 500 respondents, 42 per cent were aged 16-24, 54 per cent were aged 25-34 and 70 per cent were female. As such, the non-learners had almost exactly the same makeup as the whole survey population. However, this does not help us understand why so many young Chileans reported not having learned English when English is mandatory in secondary school. This is further compounded by the fact that 24 per cent of non-learners identified themselves as students, and while the largest share of non-learners (29%) had less than an upper-secondary education, 42 per cent had either a four-year university degree or a two-year college degree.

We asked these respondents why they hadn't learned English and what could incentivise them to learn the language.

Why haven't you learned English?

It is too expensive	55%
There was no access to government-funded programmes	33%
I'm not good at learning languages	20%
I don't have time to learn English	17%
Nobody in my family speaks English	13%
It wasn't taught during primary school	12%
I don't travel to English-speaking countries	11%
It wasn't taught during secondary school	7%
I don't need English for my job	7%
I don't want to learn English	3%

Source: British Council, Education Intelligence, Latin America Databank 2015

Respondents could choose up to three reasons. The most significant reasons for not learning English were related to cost and access: 55 per cent attributed this to the high cost of learning English, while 33 per cent cited the lack of government-funded English programmes. However, 20 per cent stated that it was because they were not good at learning languages, potentially reflecting negative experiences with English language learning as a result of poor teachers or curriculums.

While English is mandatory in secondary school, seven per cent of respondents said they had not learned because English wasn't taught at secondary level; 12 per cent attributed this to not learning during primary school, potentially reflecting an unmet desire to learn English earlier or barriers experienced by learning a language from a low base at secondary level. A further seven per cent of respondents had not learned the language because they didn't need it for their job. Very few non-learners (3%) reported having no desire to learn English.

What could motivate you to start learning English?

To improve my employment prospects	82%
To travel abroad	53%
If I was offered free English classes	42%
To improve my quality of life	35%
To enjoy films, television programmes and music in English	19%
To emigrate	18%
To improve my social status	16%
To find more information online	11%
To take an online qualification	8%
To take part in a government programme	8%
To make more friends	5%
To engage in social media	3%
If more of my family and friends studied English	1%
Because of the 2016 Summer Olympics in Brazil	0%
Because of the 2014 FIFA World Cup in Brazil	0%

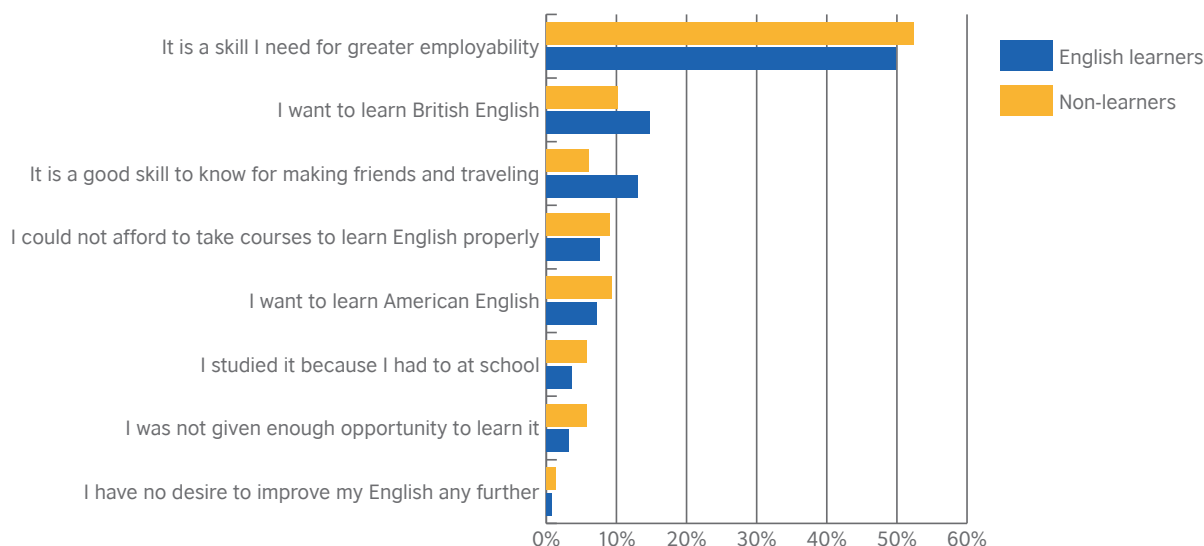
Source: British Council, Education Intelligence, Latin America Databank 2015

When asked what could incentivise them to learn English, the majority of non-learners (82%) stated that they would do so to improve their employment prospects; this may reflect a well-publicised recent study on the salary benefits of speaking English as well as the association between management positions and English proficiency. However, large shares stated that they would be motivated by more personal factors, such as being able to travel (53%), to improve their quality of life (35%) to emigrate (18%) or to improve their social status (16%).

While a third of non-learners hadn't learned because of a lack of government-funded programmes, 42 per cent stated that they would be motivated to do so if such programmes were available. Interestingly, while large shares of proficient English speakers and readers attributed this to engaging with English media such as films and music, 19 per cent of non-learners said they would be motivated to learn English to access these media and 11 per cent would learn to find more information online, potentially indicating different attitudes and learning styles. Very few non-learners would be motivated by more of their friends and family speaking English or by major international events in the region.

Views of learning English

Both English learners and non-learners were asked their views on learning English. Respondents could choose the one view that they most identified with.

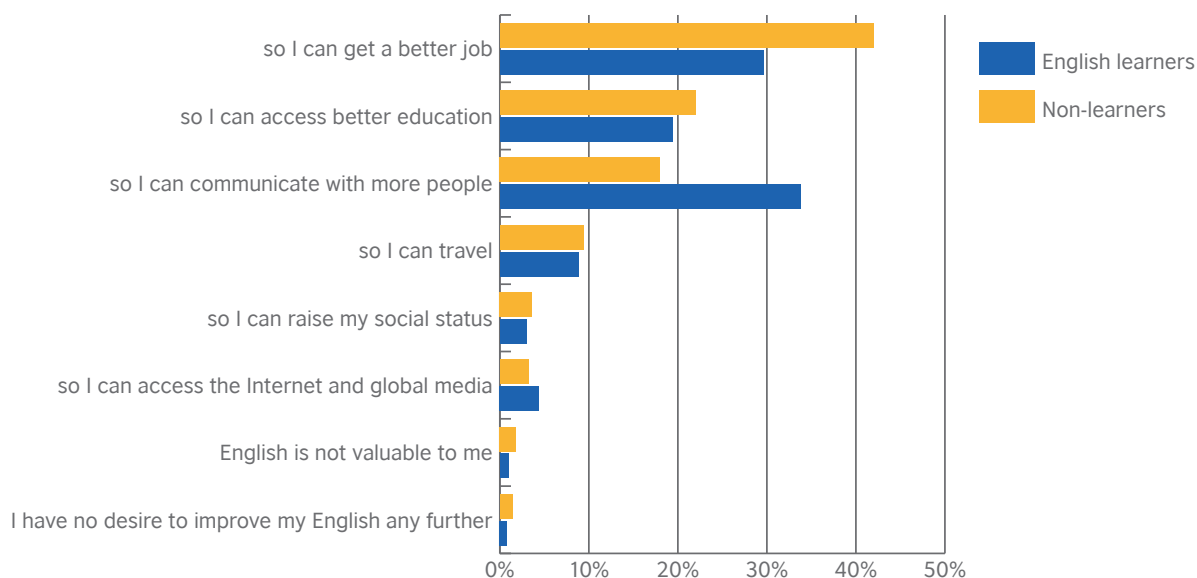


Source: British Council, Education Intelligence, Latin America Databank 2015

With some small differences, those with and without English training had similar views about English. Around half of all respondents chose the view that English was a necessary skill for greater employability. English learners were more likely to express a preference for British English over American English (15% versus 7%) than non-learners (10% versus 9%). English learners were also much more likely to express the view that English was an important skill for travel and connecting with people (13%), while non-learners were more likely to have the view that they could not afford proper English training (9%). Just four per cent of learners held the view that they only learned because it was mandatory in schools, reflecting strong learning motivations overall, and just one per cent of all respondents reported having no desire to improve their English.

Value of learning English

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



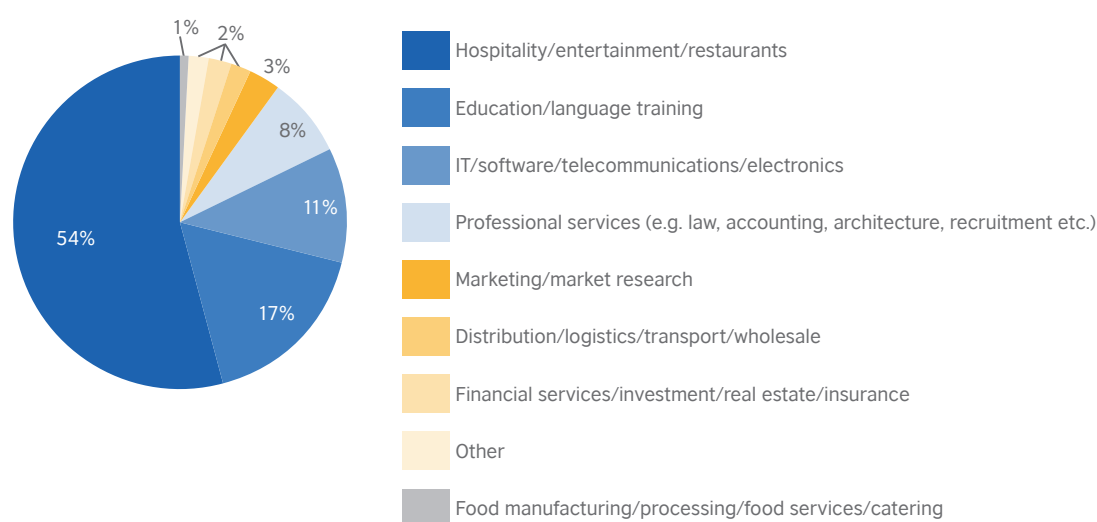
Source: British Council, Education Intelligence, Latin America Databank 2015

The results highlighted some differences in values between English learners and non-learners. The largest proportions of English learners felt that the value of English was rooted in the ability to communicate with more people (34%), followed by the opportunity to gain a better job (30%). A further 19 per cent felt that its main value was in access to better education opportunities. A much larger proportion of non-learners felt that the main value of English was in better employment prospects (42%), while the next largest share cited better education opportunities (22%). Just 18 per cent of non-learners associated English with communicating with more people (18%). Neither group defined the value of English in terms of access to the Internet and social media or social status, and very few respondents indicated that English was not valuable to them.

Employer demand for English

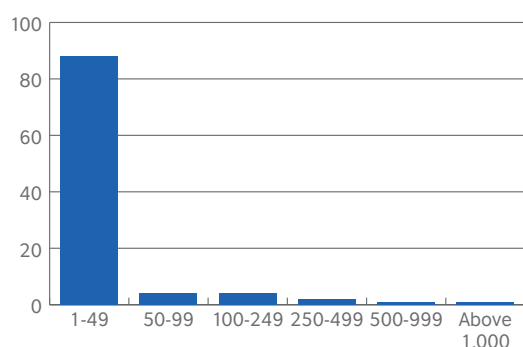
We surveyed 100 Chilean employers from different industries to better understand the relationship between employers, employment and English language acquisition.

Employer profile



Source: British Council, Education Intelligence, Latin America Databank 2015

The employers surveyed worked in a range of industries, the most common of which was the hospitality industry (54%), which includes entertainment and tourism. Other prominent industries included education and language training (17%), IT, software, telecommunications and electronics (11%) and professional services (8%). Despite strong representation from the hospitality sector, the findings of the employer survey were consistent with the views of the local stakeholders we spoke with.



Source: British Council, Education Intelligence, Latin America Databank 2015

The vast majority of employers came from small businesses: 88 per cent of respondents were from companies with fewer than 50 employees. A further eight per cent of respondents had 50-249 employees, and just one respondent was from a company with over 1,000 employees. To put the surveyed employers in context, in 2012, micro, small and medium-sized companies accounted for 99 per cent of employment in Chile.

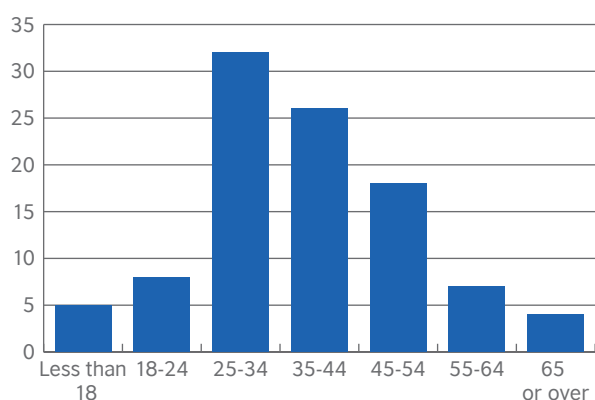
Large Urban	79%
Small Towns	11%
Other Urban	8%
Rural Towns	2%

Source: British Council, Education Intelligence, Latin America Databank 2015

The companies surveyed were from a number of provinces across Chile, with 53 per cent based in Santiago. The majority of companies (79%) were from large urban areas, while just 11 per cent were from small towns and 2 per cent were from rural towns.

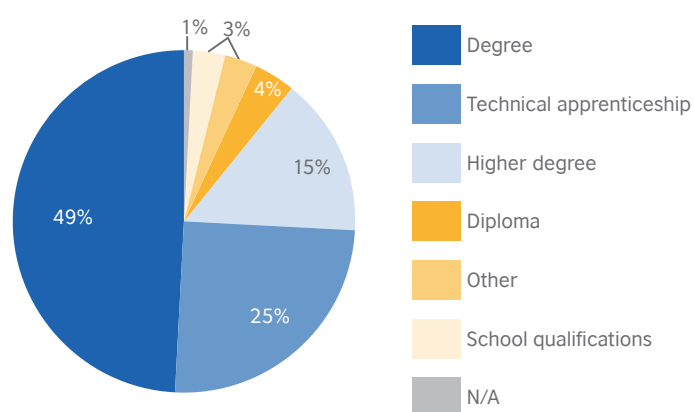
Management profile

A little over half of the respondents (52%) were female; 76 per cent were aged 25-54 and most were between the ages of 25 and 34. Just 5 per cent were under the age of 18.



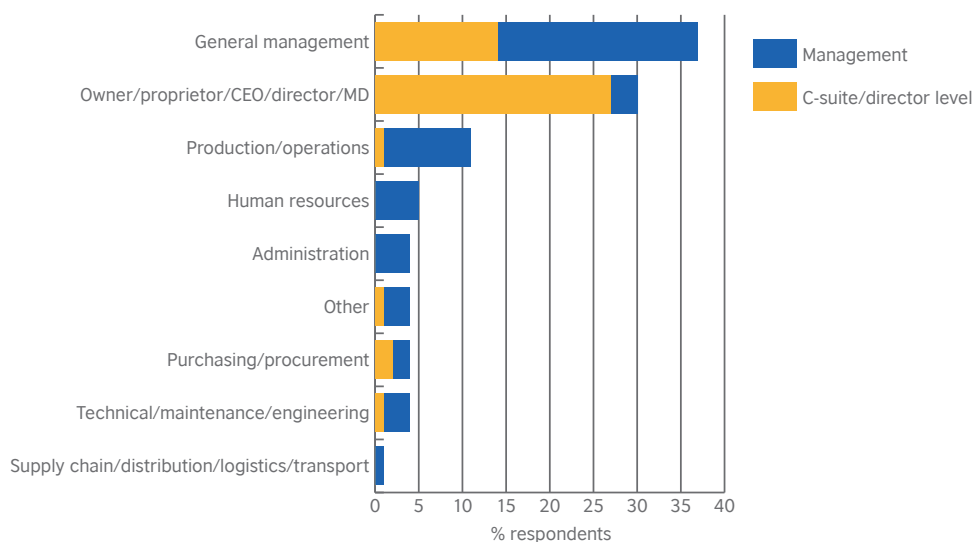
Source: British Council, Education Intelligence, Latin America Databank 2015

Nearly three fourths (76%) of respondents were between 25 and 54, with five per cent stating they were less than 18 years of age.



Source: British Council, Education Intelligence, Latin America Databank 2015

Nearly half of the respondents (49%) had a university degree and a further 25 per cent had technical qualifications; 15 per cent had a postgraduate degree.



Source: British Council, Education Intelligence, Latin America Databank 2015

Just over half (54%) of respondents were employed at the management level, while the rest worked at the executive level. Most respondents were either in general management positions (37%) or were outright owners or managers (30%).

Of the 100 employers surveyed, 95 per cent had studied English. Of these English learners, 35 per cent described their skills as fluent, while 31 per cent described them as proficient and 34 per cent, as basic.

We asked these English-speaking respondents where or how they had learned English.

Lessons at school, college or university	83%
Face-to-face courses at a language school	26%
Self-taught	19%
Had home tutoring	8%
Other	8%
Taught by parent(s)	3%
Learned through a book, CD or tape	2%
Online training programme or e-learning course	2%
Company-sponsored course	0%
Government-funded programmes	0%

Source: British Council, Education Intelligence, Latin America Databank 2015

Most respondents (83%) stated that they had learned English in school or university, while 26 per cent said they had learned through face-to-face classes at private language schools and 19 per cent claimed to be self-taught. None of the participants had taken part in government-funded programmes or company-sponsored courses, and just four per cent had taken an online course or learned through a book, CD or tape. From this, we can deduce that the large share of managers who are self-taught may engage with other beneficial channels to improve their language skills, such as English language films, radio, TV, music and social media.

A further share of respondents (8%) reported using 'other' forms of English language learning; these included but were not limited to learning on the job, learning while travelling and learning English as a first language.

Of the five respondents who had not studied English, four stated that they would like to learn or improve their English

language skills. Each of these four positive respondents stated that they would like to learn because it was necessary for their jobs, while three would be motivated to improve their employment prospects. Other motivating factors included to create wider personal networks, to travel and to gain new customers. No respondents stated that they needed English for higher education, to access more information, to improve social standing or to communicate with friends and family who speak English.

Employer use of English

In order to understand the need for English in Chile, we asked employers to evaluate how English is used in the workplace.

Languages used internally

We asked the respondents what languages were used internally in their companies. The majority (89%) said that the internal language of communication was Spanish, while 15 per cent reported using English internally and one per cent each indicated that French, German or Russian were used.

Education/language training	9
Professional services (e.g. law, accounting, architecture, recruitment etc.)	3
Hospitality/entertainment/restaurants	2
IT/software/telecommunications/electronics	1

Of the 15 respondents who stated that English was used internally, the majority (60%) were in the education and language training industry.

Languages used externally

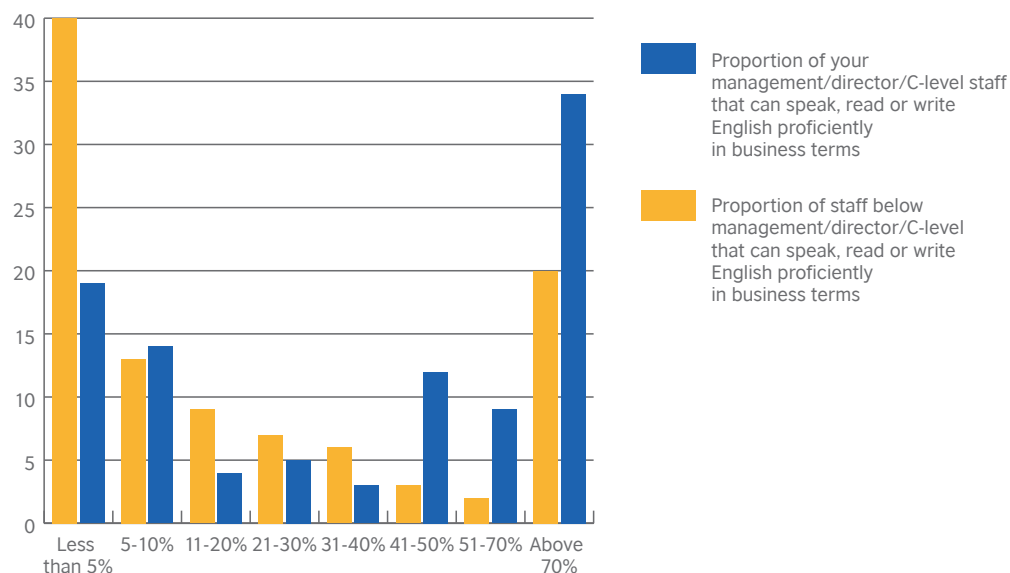
When asked what languages were used with clients and other external stakeholders, 88 per cent reported using Spanish, while 38 per cent used English, five per cent used Portuguese and a small number used French or German.

Hospitality/entertainment/restaurants	17
Education/language training	9
Professional services (e.g. law, accounting, architecture, recruitment etc.)	7
IT/software/telecommunications/electronics	3
Financial services/investment/real estate/insurance	1
Marketing/market research	1

The companies that used English externally were from a number of sectors, although the largest shares were in hospitality, education and language training and professional services.

Employee English proficiency

We asked respondents to assess the percentages of managerial and non-managerial staff in their organisations that were proficient in English.

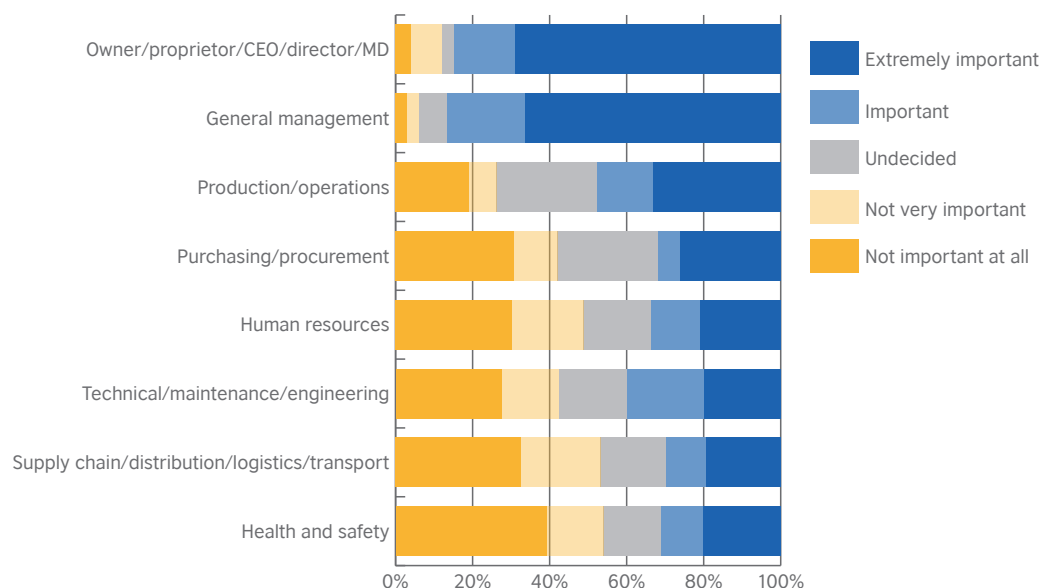


Source: British Council, Education Intelligence, Latin America Databank 2015

The results showed a general trend for managerial staff to have significantly higher English proficiency than non-managerial staff: the largest share of respondents (40%) stated that less than five per cent of non-managerial staff in their company was proficient in English, while 34 per cent reported that more than 70 per cent of managerial staff were proficient in English. We also identified a negative correlation between managers' perceived levels of English proficiency and the proportion of English speakers in non-managerial positions.

Despite this general trend, 20 per cent of participants stated that over 70 per cent of non-managerial staff could communicate proficiently in English, while 19 per cent reported that fewer than five per cent of managers were proficient in English. This indicates that in some companies, English is not necessarily correlated with employment level and job function; similarly, there may be companies where English is a requirement for most positions.

How important is English for different roles?



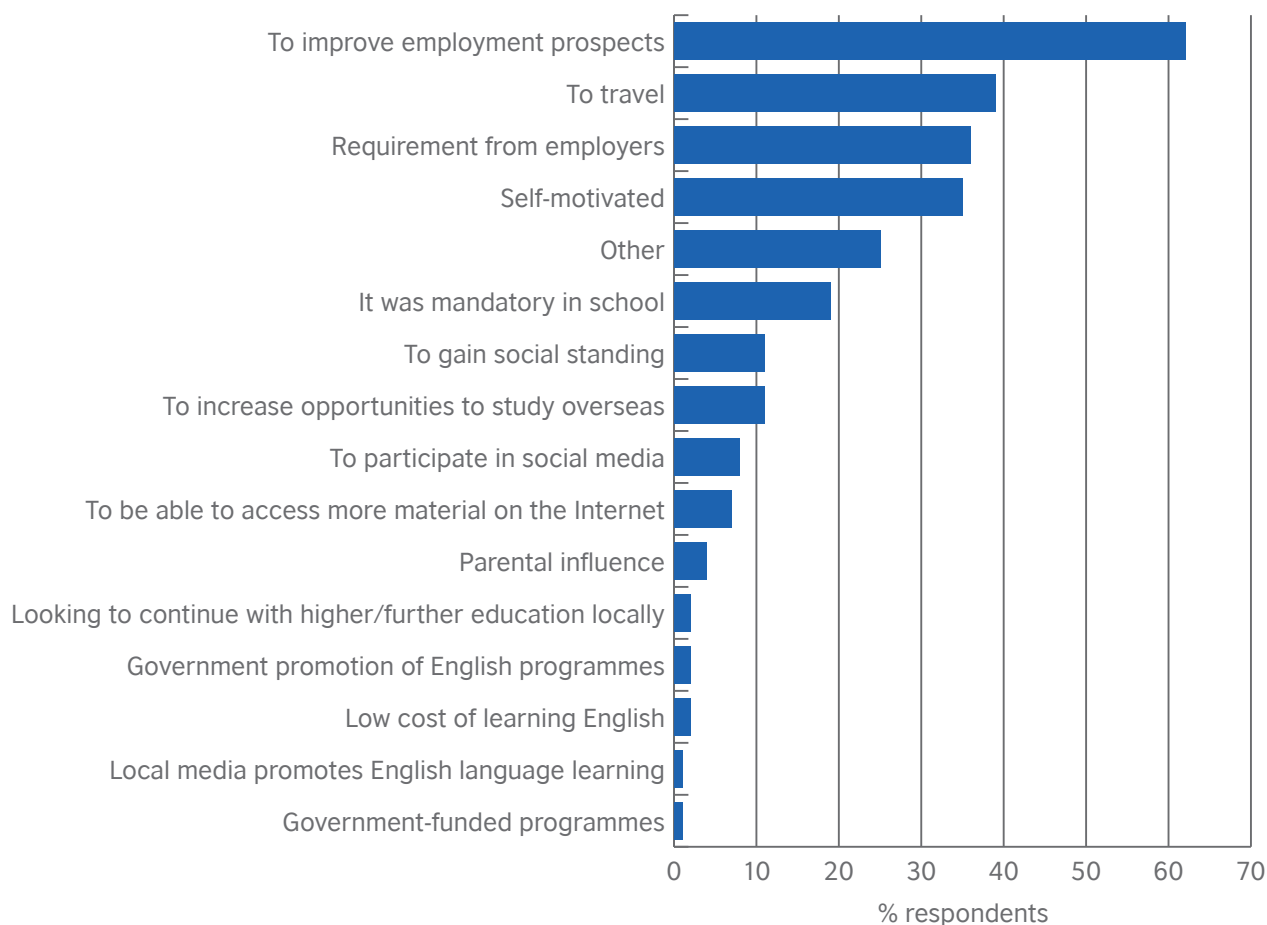
Source: British Council, Education Intelligence, Latin America Databank 2015

We asked respondents how important English was for different job functions within the organisation. Sixty-nine per cent of respondents indicated that it was extremely important for the owner, CEO or managing director to be proficient in English, and 60 per cent felt that it was extremely important for those in general management positions to have good English skills. Other areas in which English was seen as important or extremely important included production and operations and technical, maintenance and engineering. There is anecdotal evidence that those in technical professions often require English language skills in order to understand industry-specific terminology as well as manuals and updates.

Less than a quarter of respondents felt that English was important or extremely important for those in purchasing and procurement, supply chain, distribution, logistics and transportation, and health and safety. Respondents also emphasised the importance of English in other professions, including teaching, tourism, secretarial and reception work, translation and sales.

Respondents were asked whether their companies offered English language training opportunities, and 30 per cent stated that they did. Of these 30 companies, 53 per cent had internal provision, 13 per cent offered financial support for English language training, four sponsored tutorials abroad and with native speakers, three offered online programmes, three partnered with external English language training providers and two operated buddy systems. In conversations with employers, in-house courses were reported to be popular with staff, as were classes held over the Internet with external providers.

Employers' views on English language learning

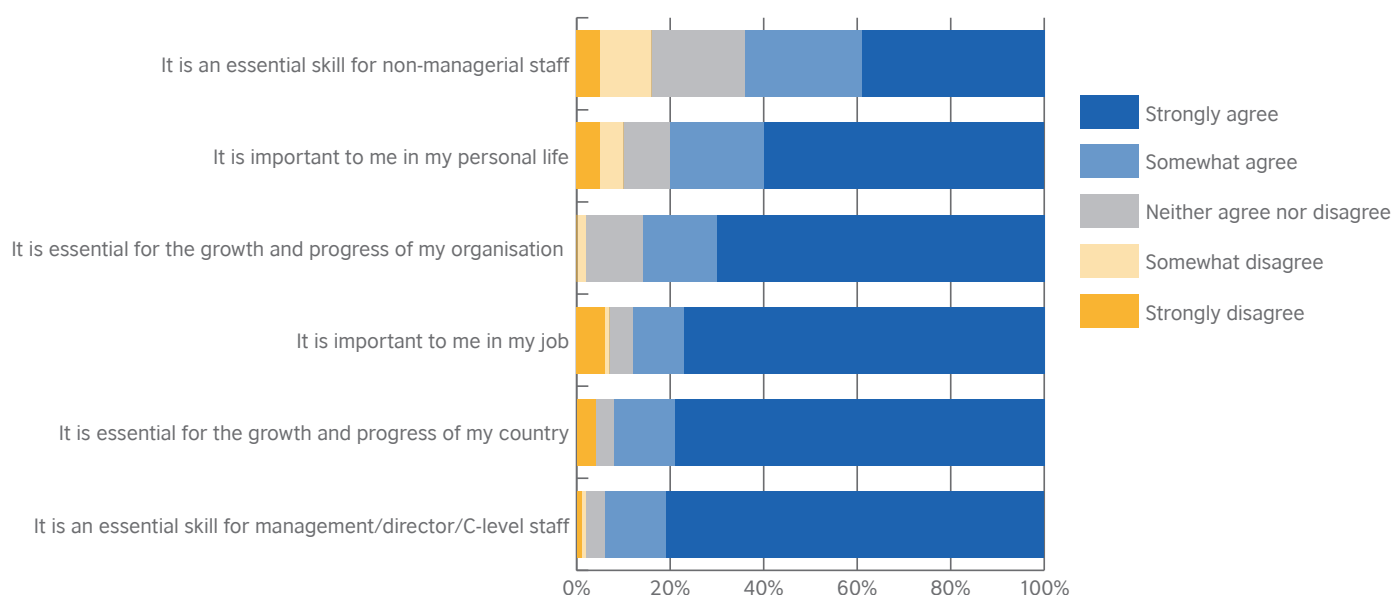


Source: British Council, Education Intelligence, Latin America Databank 2015

We asked respondents their personal views (as opposed to general company views) on the main reasons for Chileans to learn English. Respondents could choose up to three responses. The largest share (62%) stated that the biggest incentive to learn English in Chile was to improve employment prospects. Other popular reasons included to travel (39%), to meet employer requirements (36%) and self-motivation (35%). A quarter of respondents selected 'other' and cited reasons such as to communicate with and market to external stakeholders, for tourism and because it is a necessary skill in today's world.

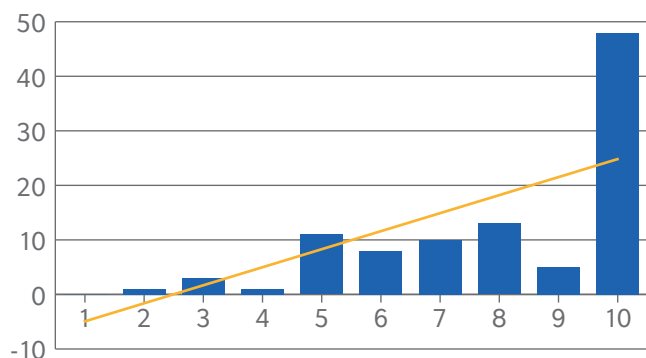
Very few managers attributed English language learning to factors such as government-funded programmes, the promotion of English in local media, the low cost of learning, government promotions, the prevalence of e-learning or higher education requirements. Overall, government involvement with English, such as through new English language policy, was not seen as a strong driver for English language learning.

To further understand these relationships, respondents were presented with a series of statements on the essential role of English.



Source: British Council, Education Intelligence, Latin America Databank 2015

While most managers agreed with all of the statements, the strongest support was for English as an essential skill for managerial staff (94% agreed) and English as essential for national growth and progress (92% agreed). Besides strong agreement with work-related factors, most managers (80%) also stated that English was important to them in their personal lives. The statement that received the least support was that English was essential for non-managerial staff; however, almost two thirds of employers (64%) still agreed with this statement.



Source: British Council, Education Intelligence, Latin America Databank 2015

We asked employers to rate the importance of English on a scale from one (not important) to ten (essential). The largest share of respondents rated English as 'essential' (10), and very few employers rated English as 'not important'.

Factors affecting English language learning

Chile is a leader in Latin America in areas such as GDP, transparency and competitiveness. The government has made the expansion of English language learning a priority, and a complex range of drivers and obstacles are shaping the success of its various policies and initiatives. These factors are outlined below.

Size and geography

Chile's geography, size and location have directly affected its relationship with the English language. The country is stretched along the southwest coast of South America and is wedged between the Pacific Ocean and the Andes. Chile's isolated location has limited Chileans' ability to travel within South America and further afield. The country has begun to internationalise rapidly, however, and this process has highlighted the country's lack of English skills.

The remote nature of much of Chile, with large areas of agricultural land and isolated mountain areas, together with the uneven distribution of resources and infrastructure, has made it difficult for the government to implement policies evenly across the country. In many smaller schools it is more likely that children will be taught together and by the same teacher, irrespective of age or grade. In particularly remote areas regular school attendance remains low. Both of these factors limit the likelihood that students will receive quality English training.

Despite these challenges, Chile's small size and population have largely made it easier for its centralised government to design and implement its initiatives, including programmes in English.

Education and English reforms

Chile is undertaking education reforms that should change the way that all subjects are taught and resourced. While English is not the main focus of these reforms, they should still influence how English is taught, and many are hopeful that reforms will create further opportunities for English teaching in public and government-supported schools. The education reforms are centred on the abolition of vouchers (copago) for government-subsided schools, universal education access and transparent admittance criteria for public schools and universities. The reforms should mean that the private sector will face increasing pressure from public sector schools. Opponents of the reforms feel that the government is focussing too much on access when the main issue is one of quality and have concerns about the lack of quality-enhancing measures, such as teacher training, within the reforms.

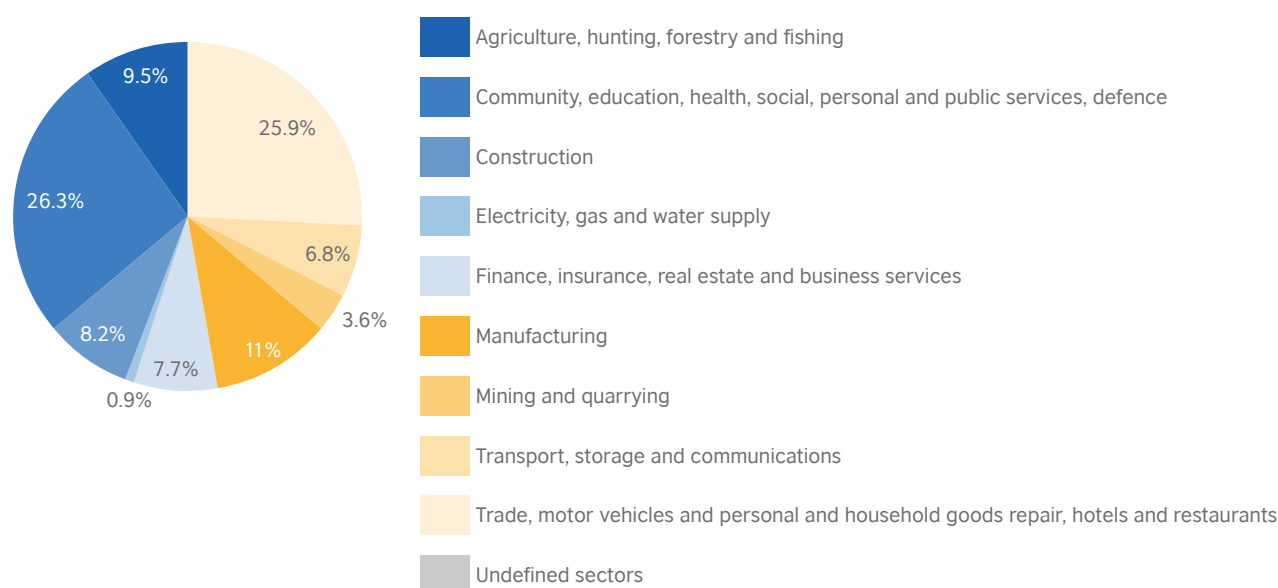
Alongside the education reforms, the EODP mandates that English is taught from a younger age and for a longer time, with the goal of students reaching B1 by the time they graduate from secondary school. Curriculums have been supported by MINEDUC, which has provided course books, workbooks, interactive software and other learning tools. The government has also increased funding to support the EODP in rural areas, with the aim of increasing access to English language learning among underprivileged communities.

Teacher training

There is a shortage of qualified English teachers in Chile. Teachers experience low pay and little respect coupled with long hours and few resources. Teachers often work more than their mandatory hours, which are already long by OECD standards, and may also work more than one job. Issues with teacher quality include a general lack of English language proficiency and limited knowledge of effective pedagogies for language training. As part of the EODP, the government is looking to revitalise the English teaching profession with the help of foreign experts, workshops, networks and camps and aims for teachers to reach C1 level. This training also includes ongoing professional development via immersion programmes and online courses.

Economic development

The Chilean economy has developed significantly as political stability has increased. The country's prosperity is due in part to its rich natural resources, although the government is reducing its reliance on this sector by modernising its agriculture sector and developing its manufacturing base. The country also has high potential as a tourism centre: tourism receipts grew by 35 per cent over 2009-2013.



Source: Euromonitor International from International Labour Organisation

Note: 'Undefined Sectors' refers to activities not adequately defined elsewhere in the other categories

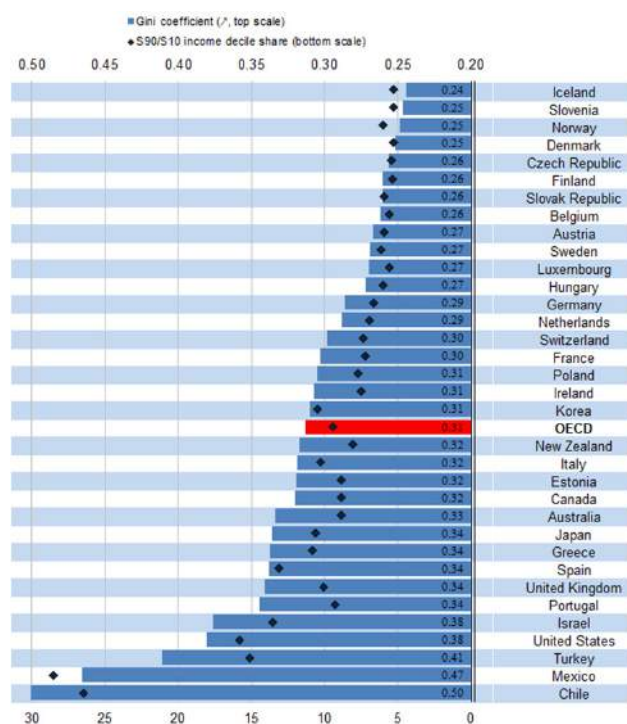
As the economy has grown, the government has looked increasingly to foreign direct investment and the internationalisation of its industries as means of generating further growth. The government has signed trade agreements with the US, the EU and China and is actively incentivising foreign companies to establish bases in Chile under the Investment Platform Initiative by offering low taxes and a comparatively even footing for national and international companies. In the World Bank's 2014 Ease of Doing Business report, Chile ranked 34th out of 189 countries, making it the best place to do business in Latin America. Chile also ranks the highest in the region in the World Bank's six Worldwide Governance Indicators. As such, Chile has a reputation as a transparent and competitive marketplace.

This internationalisation of business is both a reflection of and key motivating factor for improving English language learning. Successful foreign investment and international trade often rely heavily on English as the predominant international language of business. Business undertakings with Chile would not be possible without a degree of skill in English: before the English language learning agenda became mainstream, there was a well-publicised case of a telecommunications firm willing but unable to open a base in Chile owing to a lack of English-speaking communications workers, and 92 per cent of managers in our survey reported that English was essential for Chile's growth and development. In recent years, the increase in English language proficiency has correlated directly with growth in foreign direct investment.

Economic factors, including the attraction of further foreign investment, were key drivers of the EODP. Similarly, Chile's Production Development Corporation (CORFO), which promotes economic growth, oversees a variety of English-related programmes, including grants for studying English and sitting international exams. The government has also created a database of Chilean professionals with English skills, which potential foreign investors can access to assist them in making investment decisions.

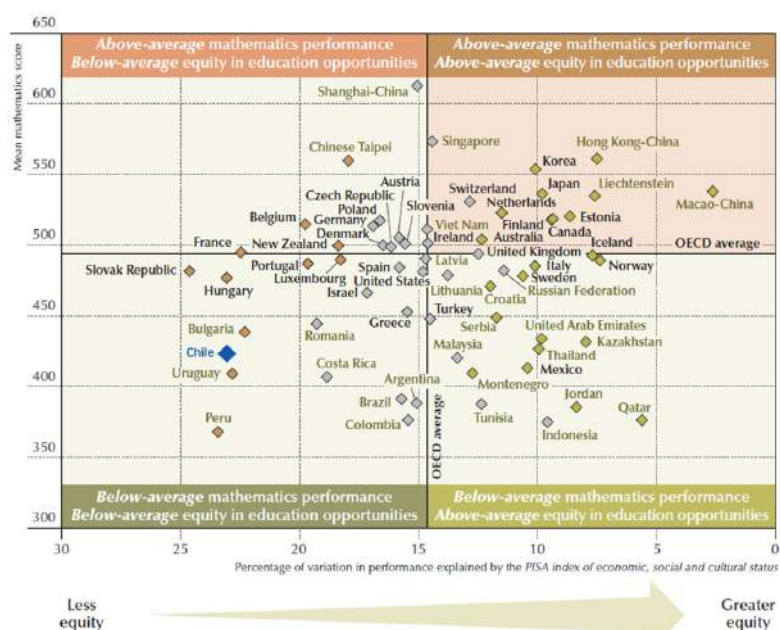
Income inequality

While the Chilean economy has grown through privatisation, industrialisation and foreign investment, these processes have also resulted in the deepening of socio-economic divides. Although civil and human rights have improved overall since the end of the Pinochet regime, Chile has become one of the most unequal societies in the OECD, as measured by the Gini coefficient.



Around one third of the population belongs to the poorest classes of society (classes D and E). By 2030, the D and E classes are forecast to account for 35 per cent of the total population. Poverty levels are falling overall and much of the future growth is expected to come from families in the E class moving into the D class. The majority of class-E families live in rural areas, while class-D families tend to be much younger (aged 15-24) or older (over the age of 65) than the population as a whole.

The wealth gap has been linked directly to education indicators and outcomes. Results from the 2012 PISA assessments show that Chile has both below-average performance in mathematics and higher than average inequity in access to education opportunities.



Source: OECD 2012

Inequity in access to education has been compounded by the expansion of the private education sector. Private schools often charge high fees, and although quality varies, they largely offer higher-quality teaching and have better learning outcomes. Conversely, public schools and municipal schools, which are government funded, have a comparatively poor reputation. While government-subsidised schools may offer a higher-quality alternative for some families, the majority of private school places are taken up by children from wealthier backgrounds: the wealthiest 10 per cent of families spend more than 30 times more on education than the poorest ten per cent. The private education market is expanding, and spending on education is forecast to be the fastest-growing consumer segment through to 2030.

This inequality in education opportunities extends to access to English language training. Our survey results show that there is a strong positive correlation between income and English language learning in Chile. This reflects easy access to English language learning from pre-school level and private tuition among wealthier families. Private schools dedicate around twice as much time to English teaching on average, and their teachers are often better trained and equipped. Both students and teachers at such schools may have access to study abroad opportunities as well as foreign travel opportunities in general; the US and UK are becoming increasingly popular study destinations. Our findings also reflect the limited access to any form of education among the poorest income groups. Low-income students in public schools are likely to experience larger class sizes and less well-qualified teachers. They are also likely to be surrounded by a different attitude towards English and have different priorities and demands on their time, such as informal employment.

Our survey results also show that cost is a major barrier to English language learning: 55 per cent of those who did not learn English cited cost as a major factor and 33 per cent reported that they did not have access to state-subsidised English programmes. In addition, 42 per cent reported that they would be interested in learning English if they were offered free classes.

Inequality in education remains a source of public discord, as evidenced by the protests of the 2006 'penguin revolution', which demanded increased access to higher and non-profit education. This factor remains one of the major barriers to nationwide English language learning.

English testing

Testing and diagnostic processes for English language learning in Chile are inconsistent. There is a lack of consensus and national guidelines on which tests should be used and where and when this testing should take place. This has resulted in confusion about which tests are required and whether some tests are even legal. English testing held in 2010 (16% of students at B1), 2012 (18% of students at B1) and 2014 (results forthcoming) was conducted using the Cambridge/Britannico, Toyt and Kip Blass systems, respectively. As such, it is difficult for the government to accurately and consistently assess progress towards its ambitious goal of 100 per cent B1 attainment. Different tests, such as IELTS or TOEIC, which must usually be studied for privately, apply for students heading overseas. While CORFO offers partial funding for around 10,000 individuals to take the TOEIC exam, this opportunity has not been well publicised historically. In 2014, the number of students sitting the IELTS and TOEFL exams increased significantly, and this has been attributed to increased awareness of government funding options such as the Chile Scholarship Programme (BCP), which funds postgraduate scholarships. Similar issues apply to teacher testing, as teachers often have to undertake private tuition in English at high cost to gain necessary or desirable qualifications. Some of these issues should be resolved as the government forms the independent Agency for Quality in Education and looks into standardised testing for Grades 2-12 (SIMCE).

Technology

Access to technology has been held up as one of the major means of overcoming education inequality and geographical isolation in Chile. Even the most remote communities often have access to mobile phones, fixed or mobile broadband and, occasionally, cable television. Technology has become a part of everyday life for the vast majority of the population and is a vital tool for internationalising the population and increasing exposure to the English language and foreign cultures: factors that our survey results show help develop strong English language skills. As such, educators are able to utilise technology in classrooms as a way of diversifying their resource base; they can also use the Internet to access online teaching materials, such as those from the EODP. For students, technology may represent a cost-effective way of accessing training, particularly in languages such as English.

However, the full potential of technology as a tool for education has not yet been realised. The results of our survey show that just ten per cent of English training providers use e-learning options. Similarly, just two per cent of the managers surveyed had learned English through e-learning, while a further two per cent had studied English using traditional distance learning methods such as books, cassettes and CDs.

Exposure to English

Exposure to English is one of the most important components of English language proficiency. Our survey results show that opportunity to practice was one of the main factors behind individuals self-assessment of their English language skills: individuals who rated their English skills as poor reported fewer opportunities to speak, read and write English. There is little opportunity for the majority of Chileans to speak English on a day-to-day basis, even in workplaces; however, with increasingly widespread access to technology, exposure to English has increased significantly. Today, many of the movies and television shows enjoyed by Chileans are in English, while radio, video games and music also use the English medium extensively. Our survey results show that 39 per cent of people who assess their speaking skills as good attribute this to watching English-medium television programmes, while 16 per cent attribute it to listening to English music.

English is also becoming more apparent in governance: both President Bachelet and former President Lagos speak English, and government services, such as signposting and public information services, are beginning to appear with English translations. English is also entering Chile through foreign companies, and exposure is increasing among some sectors of the population as wealth and scholarships mean there are more opportunities to study abroad and travel in general.

Attitudes and motivations

Potentially the most significant drivers and potential obstacles for English language learning in Chile are the attitudes and motivations of individuals and organisations. While the government has made its policy on English clear through programmes such as the EODP, it continues to face pockets of opposition and ambivalence.

At the individual level, Chileans are often described as 'shy', particularly when it comes to language learning. Fear of embarrassment may limit their interest in learning English as well as their learning outcomes when they choose to engage with the language. Low confidence and a belief in their lack of language aptitude was a contributing factor for 20 per cent of our survey respondents who had not learned English. Similarly, English continues to have a low profile in everyday public, family and business situations. This may limit people's interest in learning English in the first place and allow them to become rusty once they have learned the language, particularly in rural areas where English may be regarded as irrelevant. At the other extreme, some individuals report open hostility towards or derision of those who speak English in public, whether because English is seen as an unwanted foreign influence or because the speaker is perceived as 'showing off'. The latter may stem from the widespread belief, and partial truth, that English language learning is associated with high-income groups and private education. The other side of this is that English is associated with socio-economic success, meaning that English could have some status appeal for aspirational, upwardly mobile individuals. These perceptions could evolve as the government continues to work towards universal access to English language training.

Hostility and ambivalence towards English may also begin in the public school system, where students often receive language training in a crowded setting from ill-qualified teachers using ineffective methods. In poorer areas in particular, schools may lack the time and resources to devote to English; this may come across directly or indirectly as a deprioritisation of English and have a negative effect on student and teacher motivation. A school-level approach is now being taken to incentivise teachers and students to pursue English language training, and motivation should improve by necessity as standardised testing and diagnostic procedures are put in place.

The motivation for individuals to learn English has also grown as incomes have increased along with opportunities for international study and travel. Travel to English-speaking countries such as the US and Canada has become easier with new visa regulations, and schemes such as the EODP have facilitated study abroad. Our survey results show that over half (53%) of respondents who had not learned English would do so if it enabled them to travel. As government-assisted study abroad is currently dominated by postgraduate and science students, there is still work to be done to motivate a wider range of potential candidates to take this route.

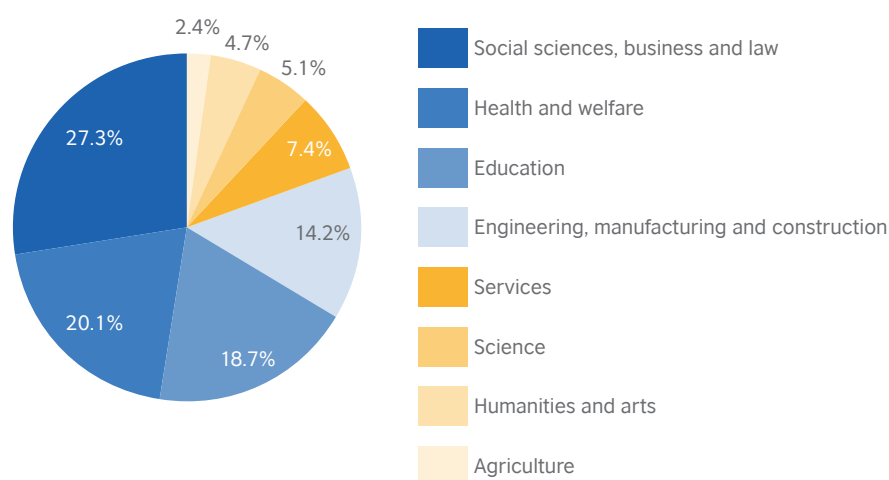
The internationalisation of Chilean businesses and society has also begun to affect attitudes towards English. This stems in part from an emerging skills gap: while Chilean graduates study a wide range of fields, there is a shortage of skilled workers in mining - an area where foreign investment and demand for English are increasingly common - as well as internationally relevant fields such as science and technology, agriculture and industrial operations and communications.

Employability

As the workplace becomes more internationalised and increasingly competitive, there is increasing demand for English among employers, even when English is not central to the role in question. Managers frequently report that English is essential for both managerial and non-managerial positions as well as working in a globalised business environment. Other fields identified in our survey as high-priority areas for English skills were management and company ownership, while fields where they were deemed less relevant included health and safety and supply chain management.

Employment is a major motivator for English language learning: in our survey, 82 per cent of managers said that better employment prospects motivated English training decisions, while a third felt that Chileans studied English to meet current or potential employers' requirements. Similarly, Chilean workers that can offer English language skills are reported to earn 30-50 per cent more on average than their co-workers. Our survey results also show that 82 per cent of those who did not learn English would do so to improve their job situation, and both learners and non-learners report a high belief in the general value of English for increasing employability and access to gainful employment. This belief is reinforced by the well-reported hike in enrolments in English language programmes during peaks in unemployment, as out-of-work individuals scramble to improve their appeal. Alternatively, this may be attributed to people taking the opportunity to learn English when time becomes more available to them.

Graduate careers



While English may appear to be a clear advantage for some, others are likely to continue to question the necessity for English in their chosen careers. The students that we spoke to reported a low interest in English if it was not a direct requirement of their intended job. This view was reinforced if company or industry bosses were known not to speak English. While 29 per cent of students surveyed learned English to boost their career options, just seven per cent did so as it was a requirement of their chosen career. From this we can infer that students see English as a value-adding measure. This finding is backed up by the large number of young people that pursue private English language training at a later stage in their education or at the beginning of their careers. This factor may also highlight the intention to wait until in employment before taking advantage of company-sponsored English training. Interestingly, while 30 per cent of the employers surveyed offered corporate training, none of the respondents in our general population survey had taken advantage of such courses.

At the organisational level, the lack of consensus among employers on appropriate measures of English language proficiency may be confusing or off-putting for students about to invest in costly accreditation programmes. Similarly, higher education institutions continue to take a largely unstandardised approach towards English teacher training and assessment. English is not required for the Prueba de Selección Universitaria (university entrance exam) and English requirements for some courses are often not taken seriously. While the government has taken a strong and unified stance on English, further work can be done to communicate this and engage all sectors of business and society, including universities, in its planning and decision-making.

Opportunities

While increasing English proficiency has become a priority for the Chilean government, as evidenced by the English Opens Doors Programme, there are a number of challenges that are preventing sustainable improvement in English language levels. Among those areas in need of improvement are professional development and training for teachers and access to English for all socio-economic levels. An awareness of where the gaps and opportunities lie may be advantageous to market observers, and these points are outlined below.

- Around one third of the population belongs to the two lowest socio-economic groups, which have limited access to English language learning opportunities despite high demand for the language
- Chile's geography and numerous isolated areas mean that technology is seen as the future delivery mechanism for English language training; however, processes have not yet been fully implemented
- Chile continues to work towards consistent and fair diagnostic testing of English language levels for students and teachers
- There are limited opportunities for students and teachers to be exposed to English, resulting in the loss of language skills
- The government is working to support teachers further in terms of pay, resources and training and aims to boost the popularity and reputation of the profession
- Chile has a competitive and transparent environment for foreign involvement and investment and is keen to internationalise further

Conclusion

Chile is in a transitional stage on several fronts, both in terms of the economy and education, and is keen to internationalise further. The government has made it a priority to improve economic competitiveness through the implementation of national English language learning standards. Key drivers are Chile's goals of diversifying away from natural resources and modernising the agricultural sector as well as attracting more foreign direct investment. Efforts to improve the general education provision are rooted in the need to address significant and damaging income inequality. The issue of equality has become particularly important, with many parents from lower socio-economic groups welcoming the opportunity for their children to learn English - which was reserved for high-income private school pupils until recently - as a means of improving employment prospects and economic mobility. English is not the major focus of the ongoing education reforms, but these reforms will still influence how the language is taught. There is concern that focusing too much on access may detract from the other major issue of raising teacher quality.

The English Opens Doors Programme (EODP), launched by the government in 2003, has brought English language learning to the forefront. The goals - to begin English language learning from a younger age, raise English language benchmarks in schools and increase teachers' English language skills - are part of an effort to make English an essential skill for the whole population rather than a luxury obtainable through costly private education for the small elite. By targeting schools and young people, the EODP aims for all students to develop a degree of fluency in English. To achieve this, it is recruiting native English volunteers, providing scholarships for overseas study and conducting language camps and competitions. The initiative is also aligned with Chile's ambitions to integrate more fully with the global economy, as signalled by the recent signing of numerous free trade agreements. At the same time, the EODP is unifying different sectors of the government concerned with general education and the curriculum.

There are numerous challenges to be overcome in improving English language proficiency. National test scores indicate that the EODP benchmarks are not being met, and this shortcoming is set against the backdrop of a broader education crisis and associated widespread education reform. Limited access to quality education for underprivileged sectors and a persistent shortage of qualified teachers are some of the biggest problems to be overcome. The teaching profession lacks respect and appeal, considering low compensation, large class sizes and poor teacher quality. These factors limit teaching efficacy and mean that while teaching hours will be increased under the EODP, the impact may not be significant. Schools with limited resources attract fewer competent teachers, making the cycle of poor teaching and low learning outcomes difficult to break.

Chile's unique geography has directly affected its relationship with the English language as it limits Chileans' ability to travel within the region as well as the ease of implementing nationwide policies evenly. Isolated communities have less exposure to the English language as well as a larger number of schools for small populations. However, smaller communities also make it easier for the centralised government to design and implement initiatives. While the government has begun to offer incentives for rural schools to implement programmes and is continuing with broader plans to train teachers, funding remains a problem: government funds only cover the minimum number of teaching hours, while the rest must be funded by schools. Increasing teaching hours requires a significant time investment, and only schools that are heavily subsidised or receive funding from alternative sources can spare the time needed for English language teacher training and course development programmes to be a success. There may also be a future for technology in English language learning, particularly for rural communities, and there has been a push for more diagnostic processes and testing to shape national guidelines.