

## English in Ecuador

An examination of policy, perceptions  
and influencing factors



May 2015

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# Introduction

Boosted by oil production and a democratic government, Ecuador is developing a strong national identity. The country has seen periods of political and economic upheaval, alternating between military rule and democracy. Today, the country is pursuing stability by diversifying away from oil into new priority sectors, such as tourism. Historically, quality education has only been available to the wealthy, and while this is changing, the gap between the rich and the poor still needs to be addressed. The current government, headed by economist Rafael Correa, is prioritising English language learning as a means of raising the country's profile further on the international stage, and public sentiment towards English is generally positive as it is linked with prosperity and better employment prospects.

# Methodology

## Phase 1

### Desk research and secondary data collection

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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

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

- an online survey of 1,004 people from the general population, most of whom were aged 16-35
- an online survey of 100 Ecuadorean 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 Ecuador.

#### Interviews

##### Government

- Deputy Head of Mission, UK Trade and Investment (UKTI), British Embassy, Quito
- Commercial Attaché, UKTI, British Embassy, Quito
- Commercial Officer, UKTI, British Embassy, Quito
- Ministerial Adviser, Ministry of Education, Quito
- English Specialist, Ministry of Education, Quito
- Programme Coordinator, Ministry of Education, Quito
- Programme Manager, International Cooperation, Secretaría de Educación Superior, Ciencia, Tecnología e Innovación (SENESCYT), Quito
- Programme Manager, Go Teacher Programme, SENESCYT, Quito
- Programme Manager, Scholarships, SENESCYT, Quito
- Programme Coordinator, Scholarships, SENESCYT, Quito
- Executive Director, Fulbright Commission, Quito

##### Education institutions

- Academic Administrator, Postgraduate School, Universidad Central del Ecuador, Quito
- Language Director, Universidad San Francisco de Quito, Quito
- Director of Language, Universidad de las Americas, Quito
- Language Coordinator, Universidad de las Americas, Quito
- Director of International Relations, Universidad de las Americas, Quito
- Language Coordinator, Language Centre, Universidad Central del Ecuador, Quito
- Director of Language Teaching, Universidad Central del Ecuador, Quito
- Language Coordinator, Language School, Pontificia Universidad Católica del Ecuador, Quito
- Language Director, Language School, Pontificia Universidad Católica del Ecuador, Quito
- English Teacher, International Relations, British School, Quito
- Head of English, British School, Quito
- Language Coordinator, Réplica 24 de Mayo Public High School, Quito
- Principal, Luis Napoleon Dillon Public High School, Quito
- Language Coordinator, Luis Napoleon Dillon Public High School, Quito
- English language teachers (nine), Luis Napoleon Dillon Public High School, Quito
- English language students (seven), Luis Napoleon Dillon Public High School, Quito

### Education professionals

- English Specialist, Inglés Rápido, South American Language Centre, Quito
- Executive Director, Centro de Estudios Interamericanos (CEDEI), Cuenca
- Executive Director, British School of Language, Quito
- Marketing Manager, Education First (EF), Quito
- Manager of Operations and Human Talent, Lenguatec, Quito
- Head of Training and Development, Lenguatec, Quito
- General Director, Colegio Menor, Quito
- General Coordinator, Dirección de Lingüística e Intercambios Culturales, Escuela Politécnica Nacional, Quito
- Academic Language Coordinator, Dirección de Lingüística e Intercambios Culturales, Escuela Politécnica Nacional, Quito

### Corporate executives

- Corporate Director, Cervecería Nacional, Quito

### Professional associations

- President, English Teachers Association of Pichincha
- Vice President, English Teachers Association of Pichincha

# Key findings

- Improving access to quality education is a government priority; as a result, a number of reforms are being funded and implemented to reach key goals
- The higher education sector has become highly privatised; to address quality concerns, the government is closing down private institutions that do not meet accreditation standards
- Ecuador's English language policy currently aims to have English as an optional language from Grade 2 and a mandatory language from Grade 8, with the aim that all secondary graduates should be at B1; English will soon be mandatory from Grade 2
- The government's scholarship and accreditation body, Secretaría de Educación Superior, Ciencia, Tecnología e Innovación (SENESCYT), offers numerous scholarships for students and teachers to study abroad as well as funding for returning and visiting academics
- Ecuador aims to increase the number of teachers with B2 English; currently, supply does not meet demand
- Students are most likely to learn English during secondary school (63%), undergraduate study (61%) or primary school (43%); most students report studying the language because it was mandatory in secondary school (52%), while 42 per cent did so because they needed it for university
- The greatest barriers to English language learning are a lack of access to government-funded programmes and the high cost of study
- Both English learners and non-learners feel that English is a tool for increasing employability, and 59 per cent of non-learners would study the language to improve their career prospects; English learners also emphasise the importance of English for communicating with others
- Almost half of Ecuadorean employers use English externally, but only 17 per cent offer opportunities for English language training and development
- Most employers (78%) feel that English is an essential skill for managers, directors and C-level staff



# Macro analysis

Since gaining independence in 1830, Ecuador has experienced cycles of political, economic and social instability, alternating between military rule and democracy. A fully democratic state since 1979, Ecuador has become a major oil exporter. Following economic collapse in 1999/2000, Ecuador adopted the US dollar in a bid to stabilise the economy. In 2006, economist Rafael Correa won the presidency; he has since been re-elected twice and enjoys high approval ratings, reflecting his policies for infrastructure development and poverty reduction.

## Education governance in the past

Education policy and spending in Ecuador have varied significantly throughout the country's history, and the current government continues to battle the legacy of mismanagement. In the 1930s, laws were passed concerning the administration of education by the state; these laws outlined curriculums and outcomes for education. Since 1963, many education laws, reforms and agreements have been passed, many of which were not acted upon and have since been forgotten. In the 1970s and 1980s, well-implemented education programmes led to increased education provision and greater access: school life expectancy rose and illiteracy fell. However, by the end of the 1980s, education spending had fallen away and the quality of the public education sector deteriorated. Drop-out rates increased and enrolment stalled, and in vulnerable, predominantly rural areas the population was unable to access adequate education. Teachers in rural areas were in short supply, and those in urban areas were often poorly trained or untrained. The teachers' union, Unión Nacional de Educadores (UNE), became a political force, demanding higher salaries and greater job security. During this period, Ecuador became increasingly reliant on international aid to administer education programmes; this resulted in internal tension between government organisations. As the country moved rapidly towards a free-market economy in the 1990s, the education system was thrown into sharp relief as its graduates were found to be largely unsuited to the changing needs of industry.

Education governance has seen mixed success, and some reforms have been more notable than others. In 1999, the Bono Solidario plan was put in place to provide assistance for low-income students; however, it was not well administered, leading to eligible families not being covered and ineligible families receiving funding. The Beca Escolar programme was also launched around this time, providing cash relief for families of students with good school attendance records, and the Programa de Alimentación Escolar was launched to provide school meals for eligible students. These programmes culminated in the 2003 Bono de Desarrollo Humano (BDH) programme, which replaced the Bono Solidario plan and provided funding for families with low scores on a government-administered welfare index.

The 1992 and 1996 National Consultations on Education brought together leaders to reaffirm the importance of education and emphasise the need for decentralisation. In 1997, the government met with the Inter-American Development Bank (IDB) to discuss the need for education reforms, and in 1998, a new constitution again emphasised the need for decentralisation. However, these actions had few real outcomes, and as such, the decentralisation trend in other regional countries is not as strong in Ecuador, where central control has been reasserted in the interests of quality and to align education more firmly with the national development plan. One example of this is the reversal of control over bilingual indigenous education, which was autonomous from 1988 to 2009 under the Directorate of Bilingual Intercultural Education (DINEIB) but has since been placed under the Ministry of Education. This was the only instance in Latin America where indigenous organisations ran a parallel education system (Spanish and Quechua) and had control over education governance, teacher recruitment and curriculums despite being under central budgetary control.<sup>1</sup>

The higher education system also has a long history. Universities were traditionally designed to train priests, but this began to change in 1895 when President Eloy Alfaro separated the church and the university sector, bringing liberal ideologies into higher education. Private universities were introduced in 1946 by President Ibarra, and for a long time access to higher education was limited largely to the middle and upper classes and did not reflect academic ability or marketplace requirements. Changing demand meant that the private university market expanded significantly in the 1980s and 1990s,

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<sup>1</sup> Hornberger, Nancy H. "Bilingual education policy and practice in the Andes: Ideological paradox and intercultural possibility." *Anthropology & Education Quarterly* 31.2 (2000): 173-201.

resulting in over 4,000 higher education programmes of variable quality. In 2008, Correa's government began to address the issue of quality in higher education by enforcing accreditation standards.

## Education governance today

Since 2006, the government has recalibrated its approach to education through a number of reforms and plans. The Ten-Year Education Plan 2006-2015, administered by the Ministry of Education, sought to address issues of quality and equality and called for the following outcomes:

1. mandatory pre-primary education to the age of five
2. mandatory basic general education from Grades 1-10
3. enrolment in secondary school diploma programmes at 75 per cent
4. the elimination of illiteracy and strengthening of continuing education programming
5. improved facilities and infrastructure in schools
6. a system of national standards and reporting, leading to higher quality and equity in education
7. an assessment of the teaching profession, including work-life balance and professional development
8. annual increases of 0.5 per cent of GDP for education spending up to six per cent of GDP

Numerous sub-objectives were employed to work towards these outcomes. Teachers were incentivised to return to the teaching profession from other jobs or retirement and new, trained teachers were injected into the system.<sup>2</sup>

In 2008, a new constitution was created, supported by over 65 per cent of Ecuadoreans, which increased the decision-making abilities of the president, allowing him to make decisions on many issues, including social issues, to bring about real and efficient change. The constitution confirmed and expanded on the goals of the Ten-Year Education Plan and has had wide-ranging effects on the education sector. The constitution states that the education system should be regulated by the state and its entities and reaffirmed that education spending would be increased incrementally to six per cent of GDP. The document mandated universal access to education as well as compulsory enrolment in initial, basic and secondary education, or its equivalent (Article 27). It further emphasised that public education, which should embody Ecuador's interculturality, should be free up to and including undergraduate level.<sup>3</sup>

Further changes were institutionalised in 2011 with the passing of the Organic Law on Intercultural Education (Ley Orgánica de Educación Intercultural), which states that it is the role of the Ministry of Education to:

- manage the national education system in co-operation with other levels of government
- formulate and implement educational policies, including the compulsory national curriculum at all levels and modalities, and supervise quality standards
- organise the provision of services for the development of human capital in the education system
- approve the participation of all stakeholders in the system
- develop and encourage scientific research and the extension of pedagogical and technological knowledge<sup>4</sup>

<sup>2</sup> *The Ten Year Education Plan 2006-2015, Ministry of Education.*

<sup>3</sup> *Constitution of the Republic of Ecuador, 2008.*

<sup>4</sup> *Ley Orgánica de Educación Intercultural, Ministry of Education, 2011.*

## Higher education reforms

The 2008 Constitution also affected the higher education system, mandating that universities develop programmes that cater to and aid Ecuador's economic development and that admission should be free at undergraduate level and regulated by entrance exams (*Examen Nacional para la Educación Superior, ENES*). It also addressed the proliferation of low-quality private universities by stating that by 2013, all universities should be evaluated by an accreditation body and sub-standard institutions closed down.

Some of the higher education goals set out in the constitution were included in the National Plan for Good Living 2009-2013. This plan outlined concrete goals and indicators, namely that scholarships and quotas should accompany the new meritocracy to ensure equal opportunities, that policy should encourage the development of higher education programmes that benefit the national economy and that universities must be accredited. It also established the government's responsibility to retain control the sector and discourage further privatisation.

The priorities for the recent higher education reform were to increase equality and improve quality.<sup>5</sup> The 2010 Organic Law on Higher Education (*Ley Orgánica de Educación Superior*) made further changes to the higher education system, including:

- stipulating the minimum number of credits students must obtain before graduating
- mandating that full-time teachers in tertiary education hold a master's degree and that by 2017, all titular professors should possess a PhD
- requiring all universities to be accredited by the *Consejo de Evaluación, Acreditación y Aseguramiento de la Calidad de la Educación Superior* (CEAACES)
- setting entrance exams that test skills instead of knowledge and aid in determining university courses
- setting evaluation tests for all university programmes, whereby after five years, if students score below the minimum for two years, the programme will be classed as 'low quality' and closed
- opening up professorships to foreign academics
- no longer classing diplomas as postgraduate degrees<sup>6</sup>

Overall, the Organic Law on Higher Education was designed to ensure that entry to higher education was based on merit rather than means and that the courses available in Ecuador reflected national requirements.

The *Secretaría de Educación Superior, Ciencia, Tecnología e Innovación* (SENESCYT), which was formed in 2008, was designated as the regulatory and scholarship body for higher education by the Higher Education Council (*Consejo de Educación Superior*). SENESCYT's objective is to support the growth of human capital by facilitating collaboration, research and technology transfer. One way it has done this is by increasing the number and range of scholarships available to students and teachers.

<sup>5</sup> "Ecuador's Path." *New Left Review*. 77. Sept-Oct 2012.

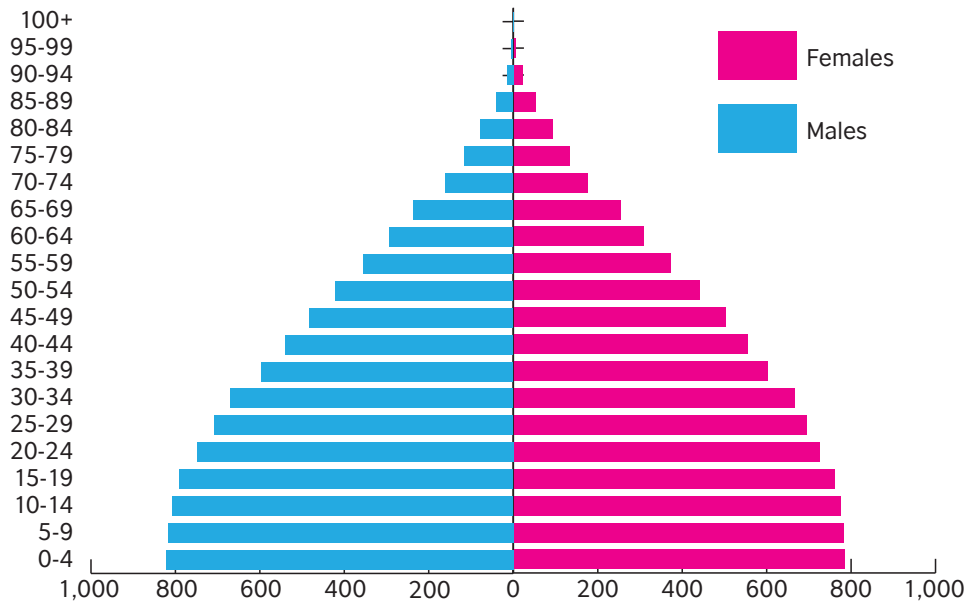
<sup>6</sup> Nunez, Anna Maria. "Country Paper Ecuador, Brief on Education." Feb 2011. Retrieved at < <http://www.slideshare.net/anitanunez23/brief-on-education-ecuador>>.

## Education indicators

### Population

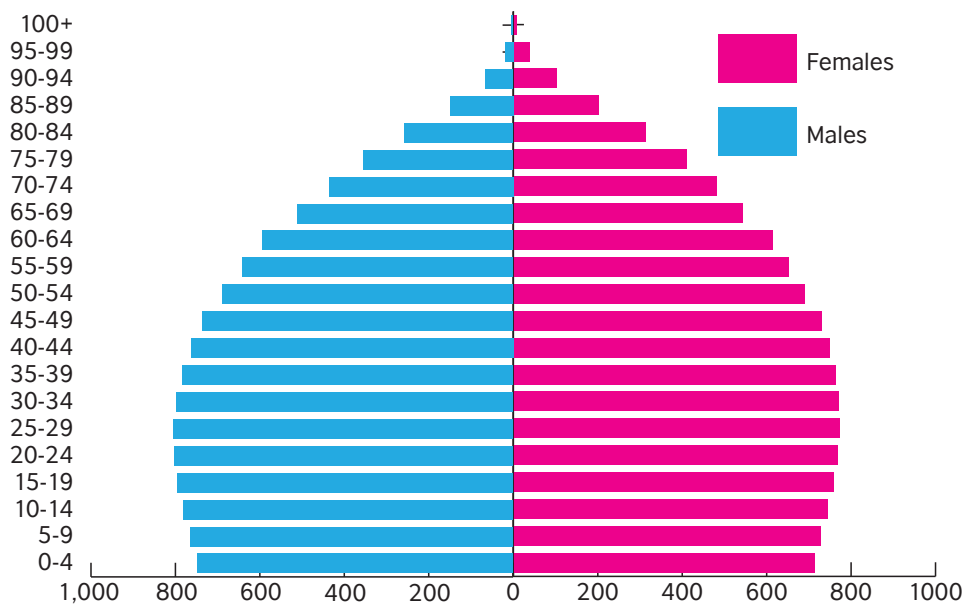
In 2013, Ecuador's population numbered 15.74 million and was growing at an annual rate of around 1.5 per cent. The population has doubled since 1980. In 2013, 30 per cent of the population was aged 0-14 and seven per cent was over the age of 65. The number of births per woman fell from 3.07 to 2.59 over 2000-2012 but remains above the replacement rate.<sup>7</sup>

#### Population pyramid: 2020



Source: United Nations Population Division, 2014

#### Population pyramid: 2050

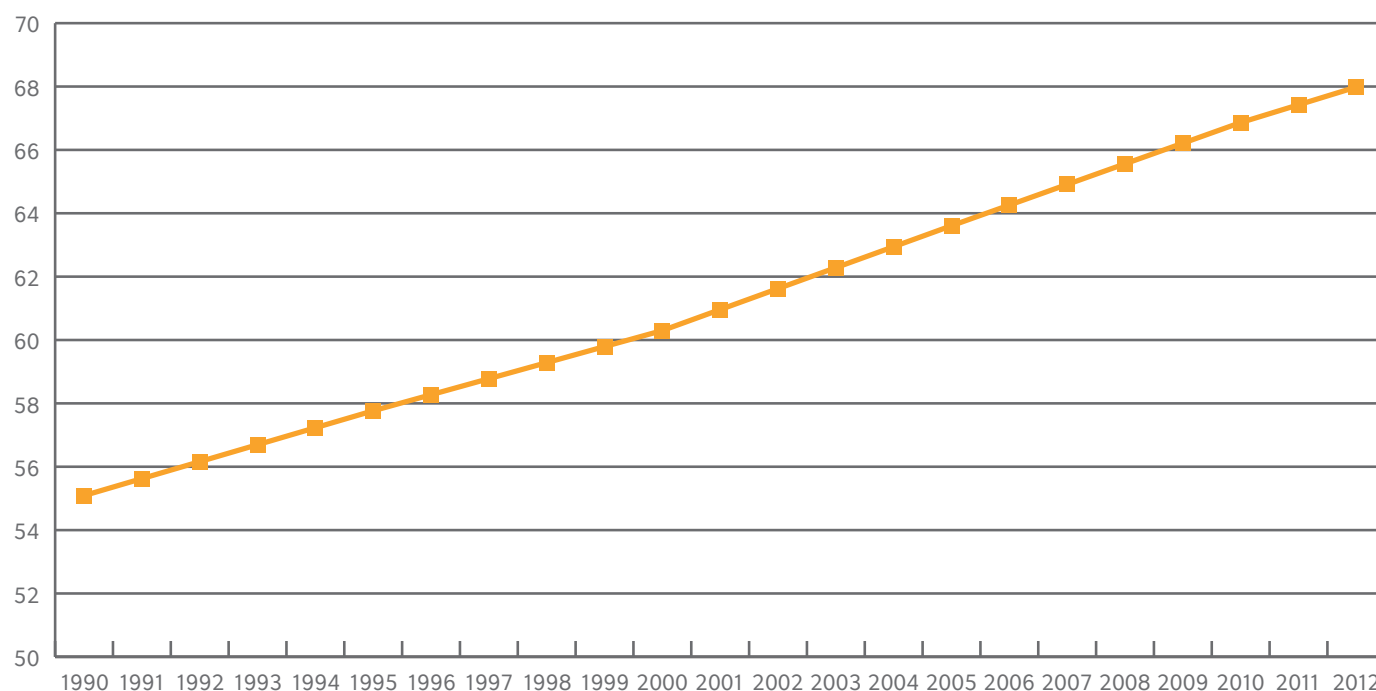


Source: United Nations Population Division, 2014

<sup>7</sup> World Bank

In 2010, 60 per cent of the population was under the age of 29 and one in three Ecuadorians was aged 15-29. The large young population means that education and employment are national priorities. Ecuador has recently achieved universal basic education, and secondary enrolments have increased threefold since 2000, while higher education enrolments have doubled. Nonetheless, the average level of education remains low.<sup>8</sup>

### Urban population (% of total)



Source: World Bank Databank, 2014

In 2012, 68 per cent of the population lived in urban areas, which is considerably lower than the South American average of 84 per cent. Urbanisation has been taking place at a rate of around 2.9 per cent annually since 1990, although growth is predicted to fall to 1.9 per cent annually over 2012-2030. Only two cities, Guayaquil and the capital, Quito, had populations over one million in 2010, at 2.3 million and 1.6 million, respectively. In 2012, approximately 27 per cent of the population lived below the poverty line; this proportion is down from 36 per cent in 2009.<sup>9</sup>

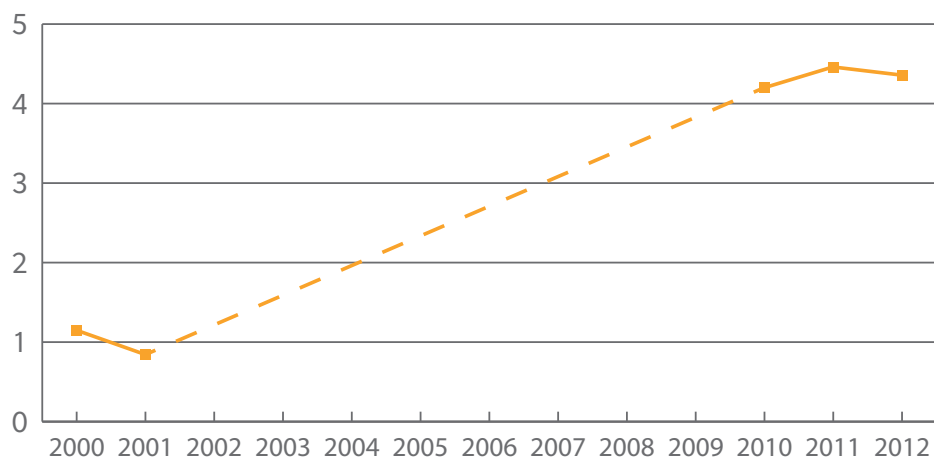
<sup>8</sup> "Youth Employment and Migration: Country Brief, Ecuador." International Labour Organisation. Retrieved at < [http://www.ilo.org/wcmsp5/groups/public/---ed\\_emp/---ed\\_emp\\_msu/documents/publication/wcms\\_230170.pdf](http://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ed_emp_msu/documents/publication/wcms_230170.pdf)>.

<sup>9</sup> World Bank

## Public spending on education

In 2012, public spending on education amounted to 4.4 per cent of GDP; this is up from less than two per cent in 2000. Data was not well reported in the past and is missing for 2002-2009.

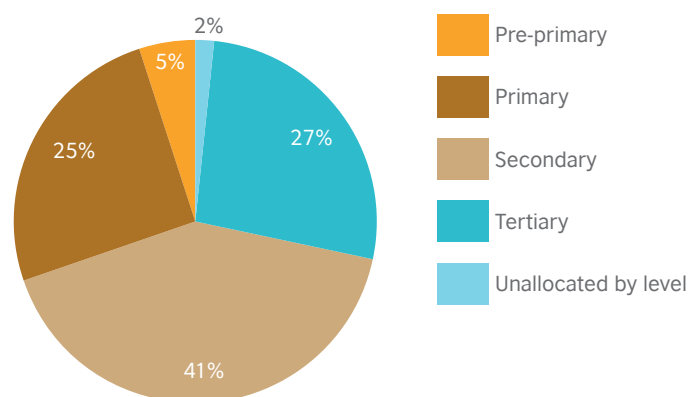
### Public expenditure on education, % of GDP



Source: World Bank

The share of government expenditure devoted to education more than doubled over 2000-2012 to 10.3 per cent. Expenditure per student is much higher at secondary level than primary level. Spending on secondary education accounted for 41 per cent of total education spending in 2012, compared to 27 per cent for tertiary education and 25 per cent for primary education. In recent years, the fastest growth in spending has been at secondary level, at 29 per cent over 2010-2011 compared to four per cent growth in primary education spending (UNESCO).

### Education spending by level, % of total spending, 2012



Source: World Bank

## Education expenditure

	2010	2011	2012
<b>Government expenditure on education</b>			
as % of GDP	4.2	4.5	4.4
as % of total government expenditure	11.8	11	10.3
<b>Government expenditure per student (in PPP\$)</b>			
Primary education	756.9	784.9	-
Secondary education	1254.3	1615.5	-
Tertiary education	-	-	-

Source: UNESCO

## Basic education structure

The 2008 Constitution states that 'education as a public service shall be provided by means of public, mixed public and religious, and private school institutions'.<sup>10</sup> Education is organised at three levels:

- educación inicial (pre-school education), from age three to five
- educación general básica, or EGB (basic general education), from age five to 15
- educación bachillerato (upper-secondary education), at age 15-18

Basic education is mandatory, and most public schools run both morning and afternoon shifts in order to accommodate the volume of students.

There are various types of school:

- escuelas públicas (central government schools)
- escuelas fiscomisionales (schools run by the central government and religious orders)
- escuelas particulares (private schools)
- escuelas religiosas (schools run by religious orders)
- escuelas laicos (lay schools)
- escuelas binacionales (bilingual schools)

## Enrolment

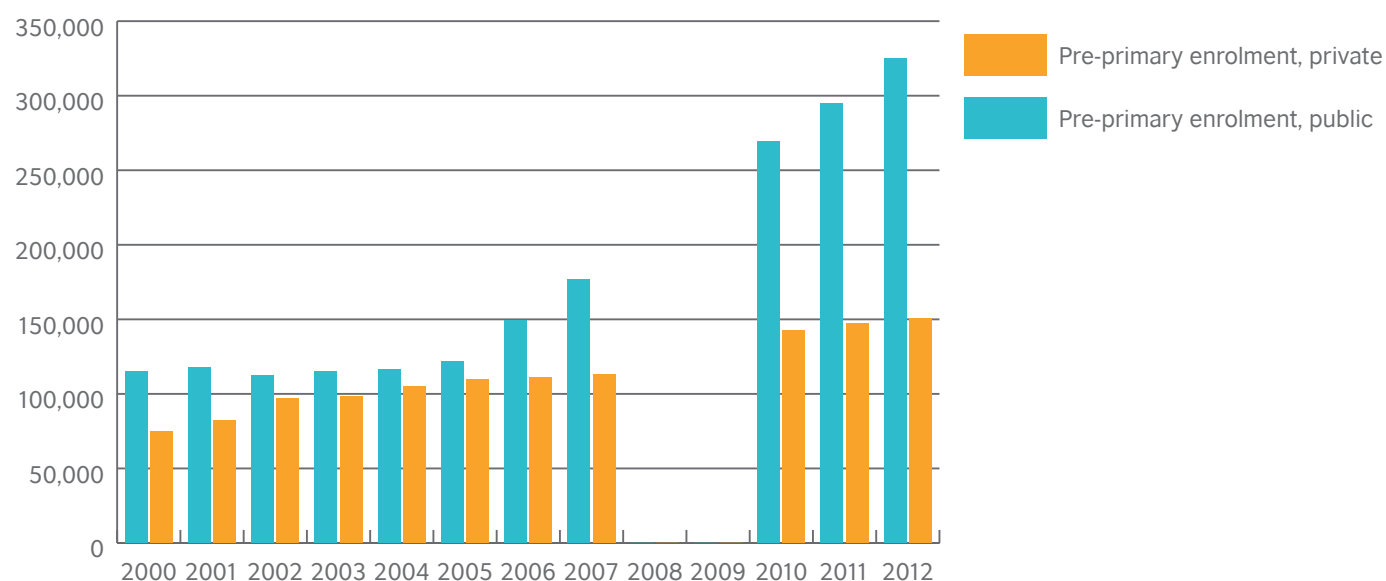
The school-age populations in Ecuador by education level are as follows:

Pre-primary	317,709
Primary	1,865,053
Secondary	1,762,598
Tertiary	1,413,626

Source: UNESCO

<sup>10</sup> Constitution of the Republic of Ecuador, 2008.

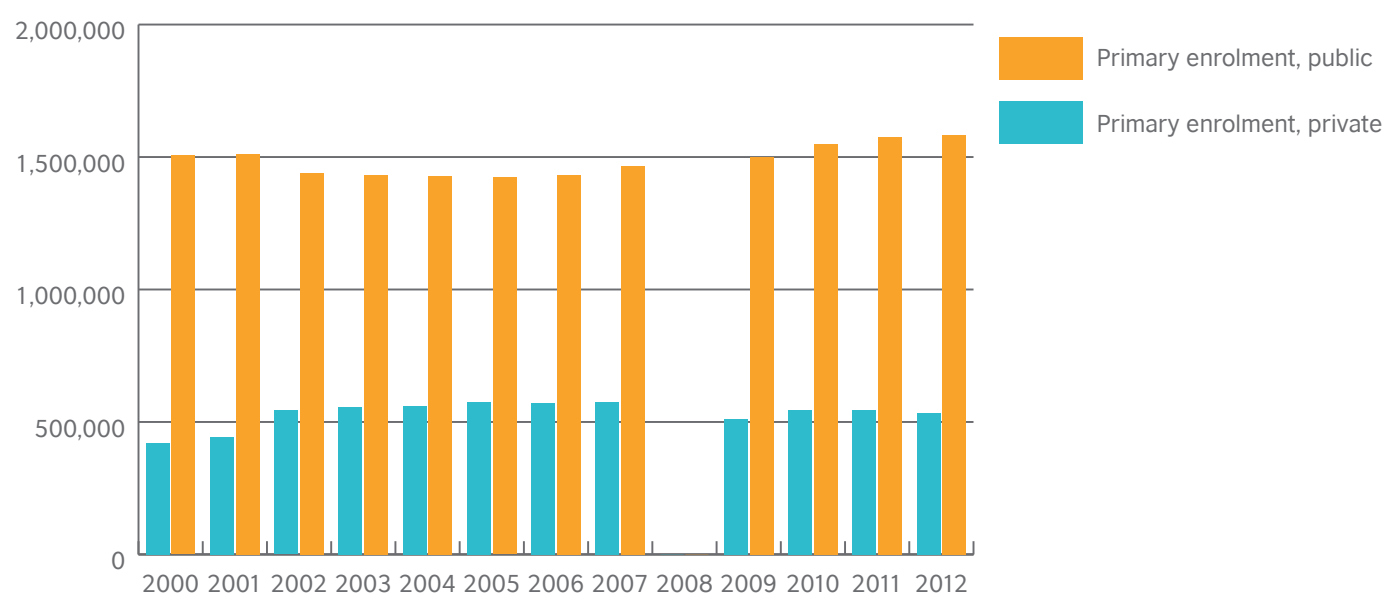
### Enrolment in pre-primary education by sector



Source: UNESCO

Net enrolment in pre-primary education rose from 60.3 per cent to 81.5 per cent over 2003-2012. While enrolment has risen in both the public and private sectors, the greatest gains have been in the public sector.

### Enrolment in primary education by sector

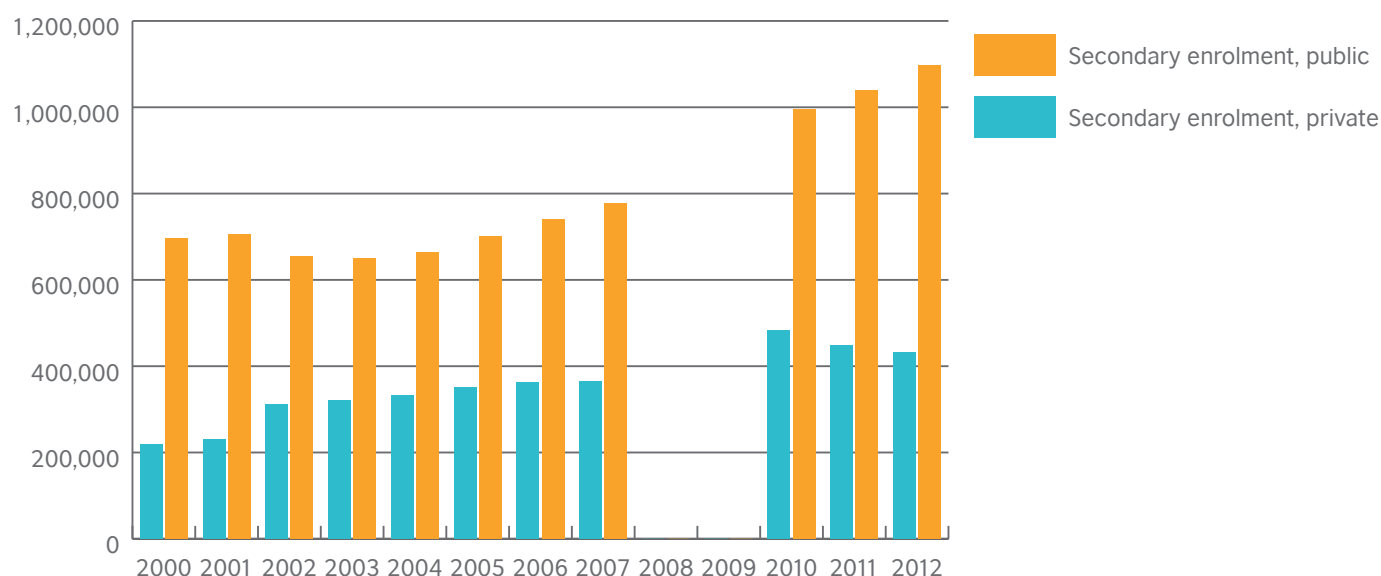


Source: UNESCO Institute of Statistics

Almost all school-age children enrol in primary education, with a net enrolment rate of 95.2 per cent in 2012, and the drop-out rate from primary education fell substantially in the past decade, potentially as a result of enrolment-linked government benefits. However, enrolment rates saw little growth and even fell slightly over 2003-2012, suggesting that Ecuador still faces challenges in delivering universal primary education. Enrolments in private primary schools have been fairly stable in recent years, while public enrolments have risen. Overall, 94 per cent of students transition to lower-secondary education.

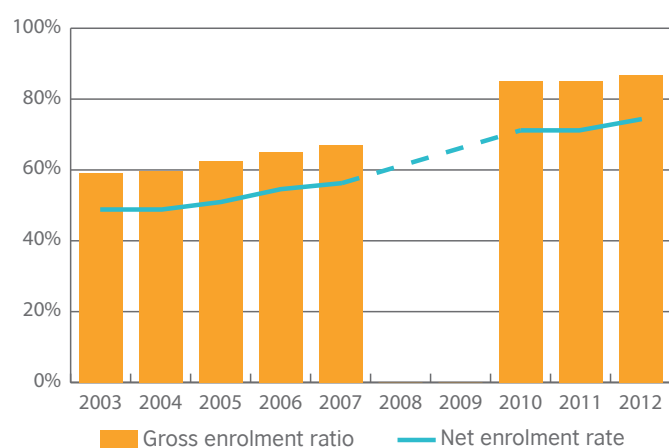


### Enrolment in secondary education by sector



Source: UNESCO

### Secondary enrolment rates



Source: UNESCO

Net enrolment in secondary education rose from 50 per cent to 74 per cent over 2003-2012. While progress has been significant, there remain issues in access to education in rural areas and among low-income households and indigenous groups.

Upper-secondary education has been reformed to provide a student-centred learning experience and a common core of subjects, moving away from the specialisation that used to take place as early as age 14. The General Unified Baccalaureate (Bachillerato General Unificado, BGU) takes an interdisciplinary approach, with core subjects, electives and a strong research component. English is mandatory for at least five hours a week and mathematics is mandatory for at least four hours a week. In addition to the core curriculum, students can choose between two options depending on their interests: science and humanities (Bachillerato en Ciencias) and agriculture, industry, business and arts (Bachillerato Técnico).

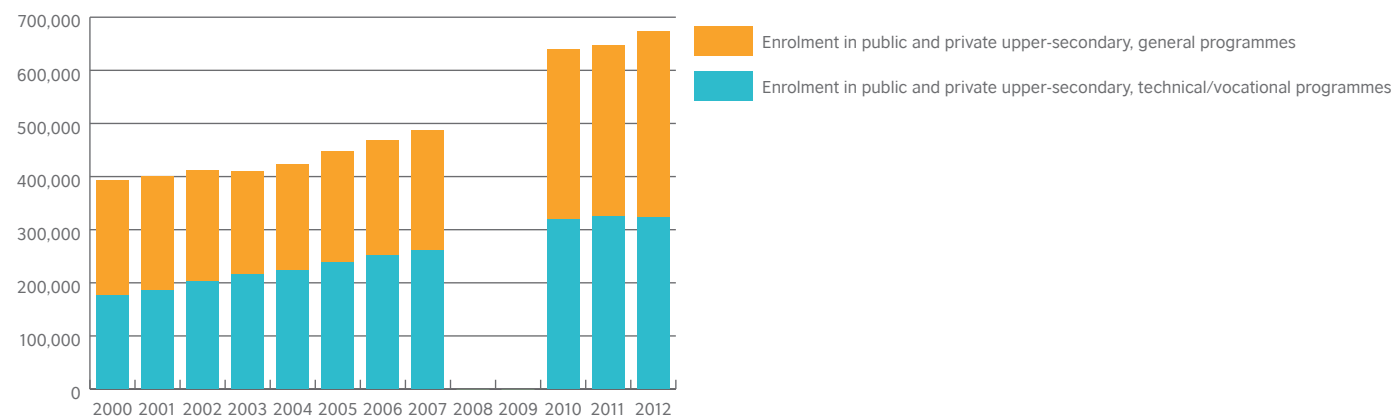
The curriculum reform was designed to coordinate upper-secondary education more closely with basic education, while simultaneously equipping students for higher education. It also aimed to update the science curriculum and ensure that students did not limit their options by specialising prematurely.<sup>11</sup> Previously, the technical baccalaureate did not give students

<sup>11</sup> "Bachillerato General Unificado." Ministry of Education. Retrieved at < <http://educacion.gob.ec/bachillerato-general-unificado/>>.

a wide enough knowledge base. The overall goal was to produce graduates that have both a common knowledge base across science, mathematics, language, history, culture and technology and the ability to think critically, be good citizens and have good self-understanding. The first cohort of BGU graduates sat the new standard university admission test (created in line with the new secondary curriculum) in September 2014.

In addition to universities, around 300 institutes of higher education offer two- to three-year post-secondary vocational or technical programmes.

### Enrolment in upper-secondary education: general and technical/vocational programmes



Source: UNESCO

### Higher education structure

The 2008 Constitution states that 'the higher education system shall be comprised of universities and polytechnic schools, advanced vocational, technological and teaching institutions, and conservatories of music and arts, duly accredited and evaluated'. Today, Ecuador claims to have the second-highest public investment in higher education in the world after Denmark, at 1.86 per cent of GDP.

Under recent higher education reforms, 14 universities (out of a total of 71) were classified as class 'E' and closed down.<sup>12</sup> The country's 29 public universities enrol 70 per cent of university students. Since 2012, admission has been via a new aptitude test designed to level the playing field for low-income and indigenous students. Tuition fees at public universities were abolished in 2008, and the government reports that this resulted in a significant increase in enrolment among indigenous and Afro-Ecuadorian students and those from low-income households. There is a general lack of historical data on higher education enrolment; however, tertiary enrolment is reported to have risen from 38.9 per cent in 2008 to 40.5 per cent in 2012, which is around the same level seen in neighbouring Peru but much lower than in upper-middle-income Colombia (48%) and Argentina (80%).<sup>13</sup> Completion is also an issue.

Almost half of graduates in 2008 (the latest available year) studied business, law and social sciences (47.9%), while a further 21.6 per cent studied education. Just over seven per cent graduated in engineering, manufacturing and construction, while smaller shares did so in science (5.5%), agriculture (3.3%) and arts and humanities (1%). The over-supply of law graduates in particular is an issue for the government, which has placed controls over university course quotas as a result.

The goal is for all university teachers to have a master's degree by 2017 and all titular professors to have doctorates.<sup>14</sup> This goal is hampered by the fact that very few universities in Ecuador grant doctoral degrees. To overcome this, SENESCYT increased the number of study-abroad postgraduate scholarships from around 20 a year in the past to over 3,000 in 2012. These students are bound to return to Ecuador to work for twice the length of time that they were funded abroad, and the government hopes that many will become university teachers. The number of professors with master's qualifications rose from 7,899 in 2008 to 11,307 in 2012 and the number of PhDs rose from 460 to 756 over the same period; professors' salaries have also almost doubled in this time.<sup>15</sup>

<sup>12</sup> "Ecuador and Peru higher education reform." UK Higher Education International Unit. Retrieved at < <http://www.international.ac.uk/newsletters/international-focus/international-focus-96/articles/ecuador-and-peru-higher-education-reform.asp>>.

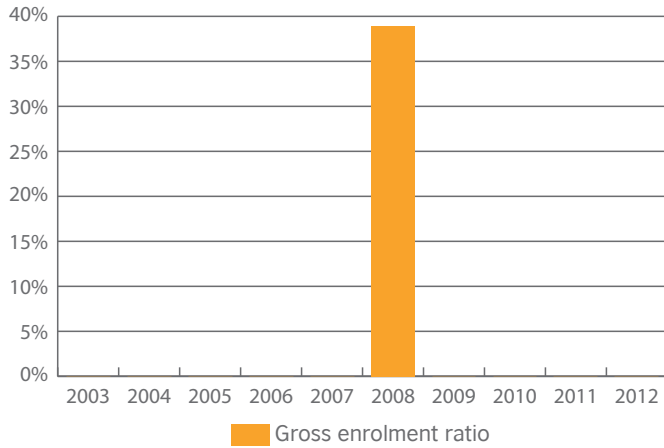
<sup>13</sup> UNESCO Institute of Statistics

<sup>14</sup> Neuman, William. "Garage universities' are bracing for school reform." *The New York Times* 18 March 2012.

<sup>15</sup> Weil, Daniel. "Massive public investment in Ecuadorian Higher Education proceeds at a startling rate while the US disinvestment proceeds at a remarkable speed." *The Daily Censored*. 20 Jan 2014.

The government has established four new public tertiary centres of excellence, each specialising in a particular subject area: the Amazonian Regional University, IKIAM (life sciences), a Yachay city of knowledge (natural and physical sciences), a pedagogical university at Azogues in the southern highlands, and the University of the Arts in Guayaquil.

### Tertiary enrolment rate enrolments



Source: UNESCO

### Youth employment

The International Labour Organisation (ILO) reports that 'youth labour market indicators and working conditions are poor and worse than for adults'. Unemployment is a particular challenge for women and young people: in 2010, youth unemployment stood at 9.8 per cent and 54.9 per cent of young people were under-employed.<sup>16</sup>

<sup>16</sup> "Youth Employment and Migration: Country Brief, Ecuador." International Labour Organisation. Retrieved at < [http://www.ilo.org/wcmsp5/groups/public/--ed\\_emp/--ed\\_emp\\_msu/documents/publication/wcms\\_230170.pdf](http://www.ilo.org/wcmsp5/groups/public/--ed_emp/--ed_emp_msu/documents/publication/wcms_230170.pdf)>.

## Government policy on English language learning

### Historical initiatives

English became mandatory in secondary schools in 1992, and other foreign languages, such as French, have also become mandatory since then. The Foreign Language Administration was established in 1992, and under an agreement between the Ministry of Education and Culture (MEC) and the British Council, the Curriculum Reform Aimed at the Development of the Learning of English (CRADLE) project was launched to reform the English curriculum in public and semi-public schools, which employed around 8,000 teachers at the time.<sup>17</sup> The main purpose of CRADLE was to ensure that secondary students built a strong foundation in English that could be developed in the future. Four language skills - listening, speaking, reading and writing - were fostered through a series of textbooks adapted to the Ecuadorean context as well as by providing teachers with technical assistance.

The CRADLE project did not cover intercultural bilingual schools, which had no official programme for teaching English. The 2008 Constitution guarantees the right to learn in the mother tongue and encourages high-quality bilingual (local language and Spanish) education. Officials of the then National Directorate of Intercultural Bilingual Education (DINEIB), felt that the flexibility of the bilingual intercultural curriculum would allow the teaching of classes in other languages and in English in particular: the English language is in high demand among indigenous populations.<sup>18</sup>

### English language policy

In 2012, the Ministry of Education launched a new National English Curriculum and a number of associated measures, which were to be administered by a newly formed English section within the ministry. These aimed to remove inequality in access to English language learning in the public and private sectors and improve the quality of English education in the public sector.<sup>19</sup>

This initiative had a number of aspects, including:

- targets for functional competence aligned with the Common European Framework of Reference for Languages (CEFR)
- new evaluation parameters for newly qualified English teachers
- continuous professional development for existing English teachers
- travel-study options for English teachers
- scholarships for students to study at universities abroad that teach in English

The Ministry of Education referenced the Communicative-Functional Language Approach and CEFR while designing the National English Curriculum Guidelines. These guidelines made English optional for Grades 2-7 and mandatory for five lessons a week lasting 45 minutes to one hour from Grade 8. The aim was to ensure that secondary graduates reached a minimum of B1 and to build up learners' competence in listening, speaking, reading and writing. From 2016-2017, English will be compulsory from Grade 2.<sup>20</sup>

<sup>17</sup> "The CRADLE Project, Ecuador." British Council. Retrieved at <http://englishagenda.britishcouncil.org/consultancy/our-track-record/cradle-project-ecuador>.

<sup>18</sup> Haboud, Marleen. "Teaching foreign languages: A challenge to ecuadorian bilingual intercultural education." *International Journal of English Studies* 9,1 (2009): 63-80.

<sup>19</sup> Moreno, Norma E. Ureña. "English Education in the Ecuadorean Public Sector: Gaps and Recommendations." *University of Pennsylvania Graduate School of Education Policy Brief*. 2014.

<sup>20</sup> "A partir de 2016 el inglés será obligatorio desde segundo de básica." *El Comercio.com*. 25 March 2014.

The English Language Learning Standards (ELLS) are as follows:

### *CEFR reference levels in the Ecuadorian educational system*

LEVEL GROUP	LEVEL NAME	LEVEL	SCHOOL GRADE
-	-		Grade 1-6 (2 <sup>do</sup> -7 <sup>mo</sup> EGB)
A	Basic user	<b>A1</b> (beginner)	Grade 7 (8 <sup>vo</sup> EGB)
		<b>A2</b> (elementary)	Grade 8 (9 <sup>no</sup> EGB)
B	Independent user	<b>B1</b> (intermediate)	Grade 9 (10 <sup>mu</sup> EGB)
		<b>B2</b> (upper-intermediate)	Grade 10 (1 <sup>ra</sup> BACH)
C	Proficient user	<b>C1</b> (advanced)	Grade 11 (2 <sup>do</sup> BACH)
		<b>C2</b> (proficient)	Grade 12 (3 <sup>ro</sup> BACH)

Source: Ecuadorian National English Curriculum guidelines (2012)

One of the aims of the English language learning reform was to create opportunities for a broader cross-section of students to study at top-ranking universities around the world. To achieve this, SENESCYT is providing full scholarships for study at institutions where English is the teaching medium, including University of Excellence (Universidades de Excelencia) scholarships. This has caused concern as B1 English is not usually sufficient for the SAT or for entry to top universities in English-speaking countries, meaning that scholarships are likely to benefit students that achieve higher than B1 English through additional means, such as private lessons.

The Ministry of Education has published guidelines specifically for English teachers on preparing lesson plans and relating lessons to learning objectives for the class, term and year.<sup>21</sup> The guidelines promote a communicative approach and the idea of language as 'a system for the expression and conveyance of meaning' and primarily as a tool of 'interaction and communication'.

<sup>21</sup> Leon Loza, Maria Ivonne. "Factors that affect the English language teaching-learning process in Ecuadorean public high schools." Tesis de Licenciado en Ciencias de la Educación – Inglés, Universidad Técnica Particular de Loja. 2013.

## English teacher training

One of the goals of the recent English language reform is to increase the number of teachers at B2 level and to ensure that teachers are skilled in a variety of teaching methods. Until 1986, teacher training colleges (normales) treated foreign language learning, usually English, French or a native language, as part of the general education programme. From 1990, post-secondary programmes were established that included English language and offered a two-year specialisation in pre-primary education. Higher Pedagogical Institutes (Instituto Superior Pedagógico) were also established in 1990 to provide three-year teacher training programmes that included the teaching of English as a foreign language. Teacher training in the bilingual intercultural educational system began in 1993 through the establishment of Intercultural Bilingual Pedagogical Institutes (Instituto Pedagógico Intercultural Bilingüe, IPIB). These institutes offered teaching specialisation programmes in the last three years of secondary school followed by two-year post-secondary programmes; they taught both an indigenous language and English, although this was not included in the bilingual curriculum.<sup>22</sup>

The current government has put in place measures to improve general teaching quality and the quality of English language teaching in particular. The Ten-Year Education Plan 2006-2015 mandated a transparent, merit-based process for teacher training and recruitment, and the 2008 Constitution stated that the government would provide professional development for public servants, including teachers. One controversial measure has been the introduction of tests of reading and logic for existing teachers, which were voluntary at first but became compulsory. Those who fail are offered training, but repeat failure may result - and has resulted for some - in dismissal.<sup>23</sup>

The Ministry of Education's English Teacher Standards outline five areas in which teachers must excel:

1. language; teachers must be proficient in English to a standard that allows them to teach the language effectively
2. culture; teachers must understand cultural beliefs and sensitively apply them in the classroom
3. curriculum development; teachers must know how to use English language content, methods and technology to achieve the standards set by the government
4. assessment; teachers should understand issues surrounding evaluation and ensure that they implement standards-based lessons
5. professionalism and ethical commitment; teachers must remain up to date in terms of professional development and the application of what they learn

In 2012, the government announced that it required English language teachers to reach B2. The government is working with a private company to test the proficiency of all public sector English teachers. Training will be offered to those who do not meet requirements. Currently, less than 1 per cent of public school English teachers are at B2. A recent study found that while most secondary school teachers held bachelor's degrees, only master's degree holders had sufficient skill to conduct high-quality, engaging English lessons.<sup>24</sup> The same study found that while many teachers claimed to use communicative or natural approaches, the grammar translation method was the method used most often in classroom observations. Similarly, lessons were found to be largely teacher centred, with virtually no class participation. The study concluded that teachers were largely unfamiliar with different teaching methods and terminology and were unable to create proper lesson plans or give constructive feedback. Nonetheless, more than two thirds of these teachers' students (67%) reported that they enjoyed learning English.

SENESCYT plays an important role in teacher training and professional development. The Go Teacher scholarship programme, launched in 2013, creates opportunities for eligible teachers with at least A2 English to head abroad for further study in the theory and practice of English language teaching. This programme relies primarily on existing partnerships with US public universities, although it also covers partners in other countries, including the UK. Scholarship teachers are required to return to Ecuador to teach in public schools and are expected to share their knowledge with their peers. The programme was launched after diagnostics highlighted low English proficiency among English teachers. Teachers who scored highest in these diagnostic tests were sent abroad for six months, while those who scored second best went abroad for four to five months. Today, teachers may be sent abroad for up to nine months, and 871 teachers have benefitted from the scholarship programme to date. SENESCYT also supports teachers and aspiring teachers to spend 14 weeks at prestigious US universities through the Teach English programme. This scheme aims to raise candidates to B2 level and help them gain TESOL

<sup>22</sup> Haboud, Marleen. "Teaching foreign languages: A challenge to ecuadorian bilingual intercultural education." *International Journal of English Studies* 9.1 (2009): 63-80.

<sup>23</sup> "Correa's curriculum." *The Economist*. 20 Aug 2009.

<sup>24</sup> Leon Loza, Maria Ivonne. "Factors that affect the English language teaching-learning process in Ecuadorean public high schools." *Tesis de Licenciado en Ciencias de la Educación – Inglés, Universidad Tecnica Particular de Loja*. 2013.

certification.

Teachers that have not achieved a high enough level for these programmes can take advantage of local professional development and online training. This is being administered in a number of ways and with a number of partners: the UK, US and Canadian embassies as well as local universities are assisting with teacher training programmes, and online provision from the Ministry of Education is becoming increasingly well known among teachers. Those taking online courses are granted time out of the working day to study; however, in practice, teachers often struggle to find time to study. The ministry is able to track participation in its online programmes. In addition to these initiatives, teachers may choose to pursue English language development privately through specialist companies or public university courses.

### *Public sentiment*

For the most part, Ecuadoreans are positive about English, which is seen as the key to valuable employment. Reforms to increase English language learning provision in public schools, and thereby remove the association between English proficiency and wealth, have met with support. Speakers of indigenous languages are particularly positive about English as they feel that their own languages are not held in high esteem and that this is disadvantageous to their children; this stems from a feeling that those who speak Spanish and English are 'elite' bilinguals while those who speak a local language and Spanish are 'minoritised' bilinguals.<sup>25</sup> One major criticism of the new English curriculum has been that compulsory language learning begins too late in a child's academic career: in a 2014 survey for *El Comercio*, a local newspaper, only 6.4 per cent of over 3,000 respondents agreed that English learning should begin in Grade 8.<sup>26</sup> The government has since announced plans to make English compulsory from Grade 2.

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<sup>25</sup> Haboud, Marleen. "Teaching foreign languages: A challenge to ecuadorian bilingual intercultural education." *International Journal of English Studies* 9.1 (2009): 63-80.

<sup>26</sup> "Los alumnos de Segundo a séptimo de básica ya no recibirán inglés." *El Comercio.com*. 23 March 2014.

# English language learning analysis

## Macro evaluation of English learners

It is estimated that there were 225,000 English speakers in Ecuador in 2010, most of whom were located in the capital, Quito.<sup>27</sup> While the accuracy and methodology of this study have been questioned, it is safe to assume the number of English speakers has increased since then as mandatory English language learning from the age of 15 has been implemented.

## Public education

English is optional before Grade 8 in public schools, after which it is mandatory. The goals for English proficiency from Grade 8 are mandated by the National English Curriculum and are based on CEFR reference levels: A1 (beginner) in Grades 8-9, A2 (elementary) in Grade 10 and B1 (intermediate) in Grades 11-12. When English becomes mandatory from Grade 2, this mandate will change, with the aim of getting all students to B2 by secondary graduation.

Enrolment in pre-primary, public institutions	366,273
Enrolment in primary education, public institutions	1,583,622
Enrolment in lower secondary education, public institutions	733,808
Enrolment in upper secondary education, public institutions	517,968
Enrolment in secondary education, public institutions	1,251,776

Source: UNESCO Institute of Statistics

UNESCO reports that there are around 366,000 students in pre-primary public schools, 1.58 million students in public primary schools, 733,000 students in public lower-secondary schools and 517,000 students in public upper-secondary schools. From this, we can infer that there are at least 1.2 million English language learners in public schools in Ecuador, and this number may well be higher considering optional English language learning before Grade 8 in some public schools.

What is less clear, however, is how well public students are learning English.<sup>28</sup> Reported problems with English language learning include large class sizes of up to 50 or 60 students, a lack of space, which impedes group work, and poorly trained and unqualified teachers. There is also a shortage of teachers: the Ministry of Education estimates that 7,500 English teachers are required to meet its objectives but that there are currently only 4,000 such teachers, many of whom are low quality. The government is aiming to meet this deficit through recruitment and professional development initiatives.

In addition, there is concern that the language requirement being set for teachers, B2, is not high enough to ensure effective English language learning. A 2014 letter to the Ministry of Education recommended starting English lessons in Grade 1 and progressing to all-content English lessons by Grade 12 as well as raising the language requirement for English teachers in secondary schools to C1.<sup>29</sup>

Despite concerns, the Ministry of Education is taking significant steps towards raising the quality of the public system. It is investing in new, high-tech public schools, known as 'millennium' schools, equipped with modern technologies, laboratories, libraries and facilities. These schools, which have capacity for around 3,500 pupils, are being built across the country and in deprived areas in particular and are being funded in part by oil revenues. To date, 70 such schools have been built, and there are plans to build a further 200 by 2017 and 500 in total. There has also been some discussion about the introduction of bilingual public schools and universities.

<sup>27</sup> Melton, J. Gordon, and Martin Baumann, eds. "Religions of the World: A Comprehensive Encyclopedia of Beliefs and Practices [6 volumes]: A Comprehensive Encyclopedia of Beliefs and Practices." ABC-CLIO. 2010.

<sup>28</sup> Leon Loza, Maria Ivonne. "Factors that affect the English language teaching-learning process in Ecuadorean public high schools." Tesis de Licenciado en Ciencias de la Educación – Inglés, Universidad Técnica Particular de Loja. 2013.

<sup>29</sup> Moreno, Norma E. Ureña. "English Education in the Ecuadorean Public Sector: Gaps and Recommendations." University of Pennsylvania Graduate School of Education Policy Brief. 2014.



## Private education

As in most Latin American countries, English language training tends to be higher quality in private schools, reflecting smaller class sizes, more resources and better-trained, more computer-literate teachers.<sup>30</sup> As such, there is a socio-economic divide in English language learning outcomes.<sup>31</sup>

Enrolment in pre-primary education, private institutions	163,766
Enrolment in primary education, private institutions	526,760
Enrolment in lower secondary education, private institutions	295,694
Enrolment in upper secondary education, private institutions	288,910
Enrolment in secondary education, private institutions	584,604

Source: UNESCO Institute of Statistics

UNESCO reports that there are approximately 163,000 students in private pre-primary schools, 526,000 students in private primary schools, 295,000 students in private lower-secondary schools and 288,000 students in private upper-secondary schools.

Private schools are diverse and include bilingual, international schools that offer English, French or other languages as the primary medium of instruction. Many of these schools offer study abroad at secondary level as immersive linguistic and cultural experiences, and students may be able to prepare for internationally recognised qualifications alongside national curriculums.

The cost of private education varies considerably and ranges from around US\$200 to more than US\$2,000 per month. There are often further expenses in addition to tuition fees, including books, classroom materials, uniforms and registration fees, and as such, the majority of private pupils are from high-income families.

<sup>30</sup> Leon Loza, Maria Ivonne. "Factors that affect the English language teaching-learning process in Ecuadorean public high schools." *Tesis de Licenciado en Ciencias de la Educación – Inglés, Universidad Técnica Particular de Loja*. 2013.

<sup>31</sup> "From the field: Signs of continuing growth in Ecuador." *ICEF Monitor*. 21 Nov 2014.

## English in higher education

Most universities are clustered in the major cities of Quito, Guayaquil and Cuenca (with two operating campuses in all three cities) and there are only a handful of institutions in other areas. The four new centres of excellence planned by the government are distributed across the country.

University entrants take a skills-based entrance exam (ENES) that guides them towards a course of study. ENES does not test for English. Entrance requirements are highest in the fields of medicine and teaching, as the government is striving to increase standards in these professions. There is currently no English language requirement for university entry, and while bachelor's students are required to graduate with at least B1 English, there is uncertainty as to how this is evaluated, and anecdotal evidence suggests that students take insufficient classes to reach this level, depending on the course. There are also exit requirements at the postgraduate level. While there is currently some discussion about introducing English language entry requirements for certain courses, this would not apply to Ecuador's private bilingual universities.

There are very high wage premiums associated with a tertiary education: an Ecuadorean without a degree earns less than US\$200 per month on average, while a professional that has completed a degree has average income of around US\$1,500 per month. Employees with a professional degree also have better access to benefits such as training, paid leave and social security than those that have not completed tertiary education (77% and 35%, respectively).<sup>32</sup>

The higher education sector is internationalising, and SENESCYT has entered into an increasing number of agreements with foreign partners in recent years, highlighting the importance placed on higher education collaboration by the government.<sup>33</sup> While some of these partnerships are with region neighbours and with Spain, many are with organisations in the US, the UK, Canada, Australia, the Netherlands and South Korea. SENESCYT is also sponsoring the Prometeo (Prometheus) initiative, which incentivises scholars - including overseas Ecuadoreans - to come to Ecuador for research and knowledge-transfer activities for a period of four months to one year. This programme has been difficult to promote and interest has not been as high as anticipated. SENESCYT also offers Open Call and Universities of Excellence scholarships for eligible students to study abroad. UNESCO reports that in 2012, 10,926 Ecuadoreans were studying abroad, with the largest shares heading to Spain (3,609), the US (2,092) and Cuba (1,557). Spain remains popular as students do not require advanced English skills to study there; however, students are increasingly expanding their horizons to include countries such as Argentina, Australia, Canada, Ireland, Malta, Russia and the UK.<sup>34</sup> The sharp rise in higher education spending and the growing provision of scholarships all point towards increasing opportunities for joint research and mobility in the future.

As part of its 2011 secondary education reforms, the Ministry of Education is looking to enhance technical and vocational post-secondary education channels.<sup>35</sup> There are currently few TVET programmes in Ecuador, but it is a developing area. The government is working with a Belgian non-governmental organisation, the Flemish Association for Development Cooperation and Technical Assistance (VVOB), to help improve both TVET provision and student linkages with the labour market and internships. One of the aims of this cooperation is to improve the image of TVET and enhance the quality of the TVET profession.<sup>36</sup> As the technical option is now part of the common curriculum at secondary level, technical students receive the same English language training as students on general programmes.

<sup>32</sup> "Youth Employment and Migration: Country Brief, Ecuador." International Labour Organisation. Retrieved at < [http://www.ilo.org/wcmsp5/groups/public/---ed\\_emp/---ed\\_emp\\_msu/documents/publication/wcms\\_230170.pdf](http://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ed_emp_msu/documents/publication/wcms_230170.pdf)>.

<sup>33</sup> "Convenios De Giras Academicas." Secretaría de Educación Superior, Ciencia, Tecnología e Innovación.

<sup>34</sup> "From the field: Signs of continuing growth in Ecuador." ICEF Monitor. 21 Nov 2014.

<sup>35</sup> "TVET Programme 2014-2016." The Flemish Association for Development Cooperation and Technical Assistance. Retrieved at <http://www.vvob.org.ec/sitio/en/eftp-programme-2014-2016>.

<sup>36</sup> "TVET in Ecuador. TVET in the world: The unknown is not loved." The Flemish Association for Development Cooperation and Technical Assistance. Retrieved at < <http://www.vvob.be/vvob/en/story/tvet-ecuador-tvet-world-unknown-not-loved>>.

## Provision of private English language training

According to local newspaper *El Comercio*, there were 300 private English schools in Quito alone in 2014, up from just 50 ten years ago, and private institutes are proliferating all over the country, including in rural and isolated areas.<sup>37</sup> Enrolment in private language institutes has continued to rise in spite of growing government support for English language learning, and this trend is expected strengthen if universities decide to set English language entry requirements. As a result of growing numbers of foreign tourists in the capital, employees in the tourism, hotel and restaurant management and hospitality sectors in Quito are increasingly looking to improve their English language skills.<sup>38</sup> As such, many schools offer specialised courses and many also partner with local companies to administer tailored staff training.

British Council courses were popular before the office closed, and some of main players today include Benedict, which caters to both children and adults, the Wall Street Institute and Education First (EF), which also offers immersion programmes abroad. The teaching quality at private language institutes varies, and while some tend to employ mostly native speakers others are less selective. The cost of private English courses ranges anecdotally from around US\$100 for a 50-hour course to US\$2,150 for a one-year programme. The table below provides a sample of course prices from different providers and in different cities.

INSTITUTION	CITY	COURSE VALUE (US\$)
CEDAS	Ambato	280.00
Universidad Técnica de Ambato	Ambato	250.00
Cambridge	Ambato	378.00
CEDEI	Cuenca	179.20
Benedict	Guayaquil	266.56
Illinois Institute	Ibarra	268.80
Fine-Tuned English	Loja	333.00
Cambridge	Manta	268.80
CEC (EPN)	Quito	233.50

Source: Provided by the Fulbright Commission

Government policy affects private English language institutes in several ways; for example, both public and private institutes must follow a set programme and have government authorisation, including health and safety provisions. The government also sets recommended prices for English language training. While there are reports that the government is considering establishing low-cost public English language institutes, it is unlikely that this will affect the well-established consumer market or change consumer perceptions of private providers.

In addition to traditional private language institutes, an increasing number of parents are investing in English courses abroad to prepare students for international university programmes, and many of these families are from the emerging middle class. Such programmes include short courses, summer schools and even periods of secondary-level study abroad.<sup>39</sup> Parents also often pay for private classes to supplement school provision. Private tuition may cost anything from US\$10-12 for a one-hour lesson with a retired teacher to as much as US\$30. Quality varies significantly. There is anecdotal evidence that British tutors tend to charge higher prices than American tutors, who include Peace Corps volunteers.

<sup>37</sup> "Las academias privadas amplían la oferta de clases de inglés." *El Comercio.com*. 27 March 2014.

<sup>38</sup> "From the field: Signs of continuing growth in Ecuador." *ICEF Monitor*. 21 Nov 2014.

<sup>39</sup> "A Guide to Teaching Abroad in Ecuador." *GoAbroad.com*. Retrieved at <http://www.goabroad.com/teach-abroad/search/ecuador/teach-abroad-1>.

## Self-access English language learning

Self-access learning encompasses private channels that offer blended and informal learning through radio, print and other media. While Internet penetration is believed to be higher in Ecuador than in many other Latin American countries - even in rural areas - self-access learning is not popular.

### Internet growth and population statistics

YEAR	POPULATION	INTERNET USERS	% PEN.	GNI P.C.	USAGE SOURCE
2000	12,090,804	180,000	1.5%	\$1,280	ITU
2005	12,090,804	713,277	5.9%	\$2,180	Supertel
2006	12,090,804	968,000	8.0%	\$2,630	Supertel
2008	13,927,650	1,109,967	8.0%	\$3,080	Supertel
2009	14,573,101	1,840,678	12.6%	\$3,640	Supertel
2011	15,007,343	4,075,500	27.2%	\$5,096	Supertel
2014	15,654,411	11,645,340	74.4%	N/A	Supertel

Note: GNI p.c. = gross national income per capita and corresponds to World Bank data for 2000-2014 in US dollars.

In 2014, Ecuador ranked 82nd out of 148 countries in the Networked Readiness Index (NRI), which is up from 91st in the previous year. There has been a dramatic increase in the number of networked computers in homes in recent years, with penetration rising from 2.5 per cent in 2005 to nearly 25 per cent in 2013.<sup>40</sup> The Internet penetration rate reached almost 75 per cent in 2014, which is up from less than 2 per cent in 2000.

Online English language learning programmes are run through university institutes and private language schools, but while they may be seen as a way of saving time and, sometimes, money, drop-out rates are high.

## International English language evaluation

In 2015, Ecuador is scheduled to participate in the international PISA tests. To better understand the English language environment in Ecuador as it relates to that in other countries in Latin America and around the world, it is important to study national assessment scores.

### 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
19	19	20	21	<b>79</b>

In December 2012, the average score for Ecuadorean TOEFL examinees was 79, meaning that Ecuadorean students are classified as 'intermediate' for reading and listening and 'fair' for speaking and writing.

<sup>40</sup> Euromonitor

## 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
6.5	6.9	6.0	6.5	<b>6.5</b>
GENERAL TRAINING				
Listening	Reading	Writing	Speaking	Overall
6.0	5.8	5.9	6.4	<b>6.1</b>

Ecuadoreans who took the academic IELTS exam in 2014 performed particularly well in reading and comparatively poorly in writing, while those who took the general training exam scored best in speaking and worst in reading. The average score for Ecuadoreans taking the general training exam was 6.1, representing competent users with a 'generally effective' command of the language, while those who took the academic test scored 6.5 on average, which places them between 'competent users' and 'good users', following IELTS definitions.

## 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	<b>6.5</b>
B2	84	6
B2	<b>80</b>	6
B2	71	5.5
B1	61	5
B1		Between 4.5-5
A2		Less than 4

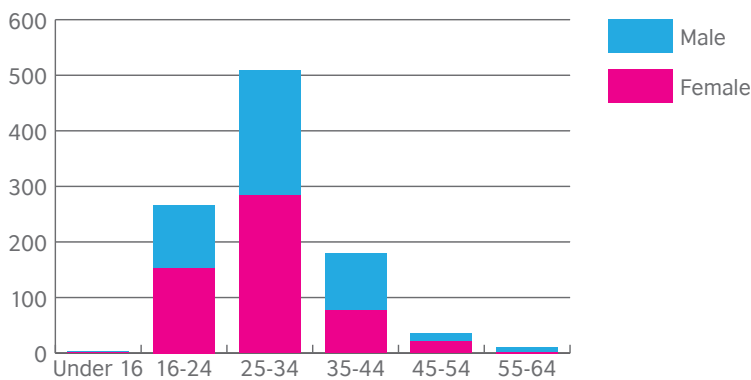
Based on Ecuadoreans' IELTS and TOEFL results, English proficiency is at a low to medium level, approximately equivalent to B2/C1. As these measures are based on self-selecting samples, it is not surprising that there is some variance. What this does tell us, however, is that those taking the IELTS and TOEFL tests - students that have probably benefitted from some of the best English language education in the country - are at around a B2 level.

# English learning motivations

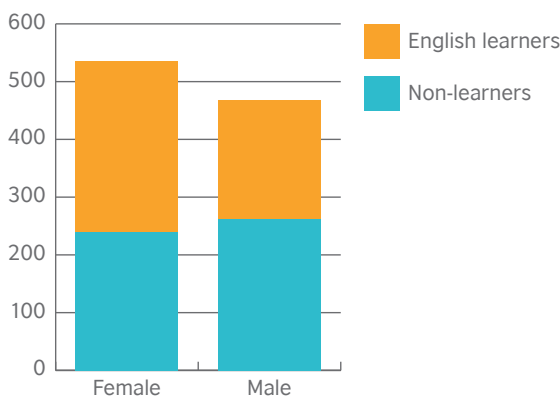
The British Council surveyed 1,004 Ecuadoreans to better understand their perceptions of English language learning. The survey was conducted in Spanish. With this questionnaire we aimed to ascertain the occupations, income levels, interests and viewpoints of English learners and non-learners. By contrasting 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.

## Survey respondents

Over half of the respondents were aged 25-34, while 26.5 per cent were aged 16-24 and 17.8 per cent were aged 35-44. A little over half of the participants (53.4%) were female, and the gender balance was fairly even across all age groups: 58 per cent of those aged 16-24 were female, compared to 56 per cent of those aged 25-34 and 42 per cent of those aged 35-44. Overall, women were more likely to have learned English than men: 55 per cent of women were English learners, compared to just 44 per cent of men.



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



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

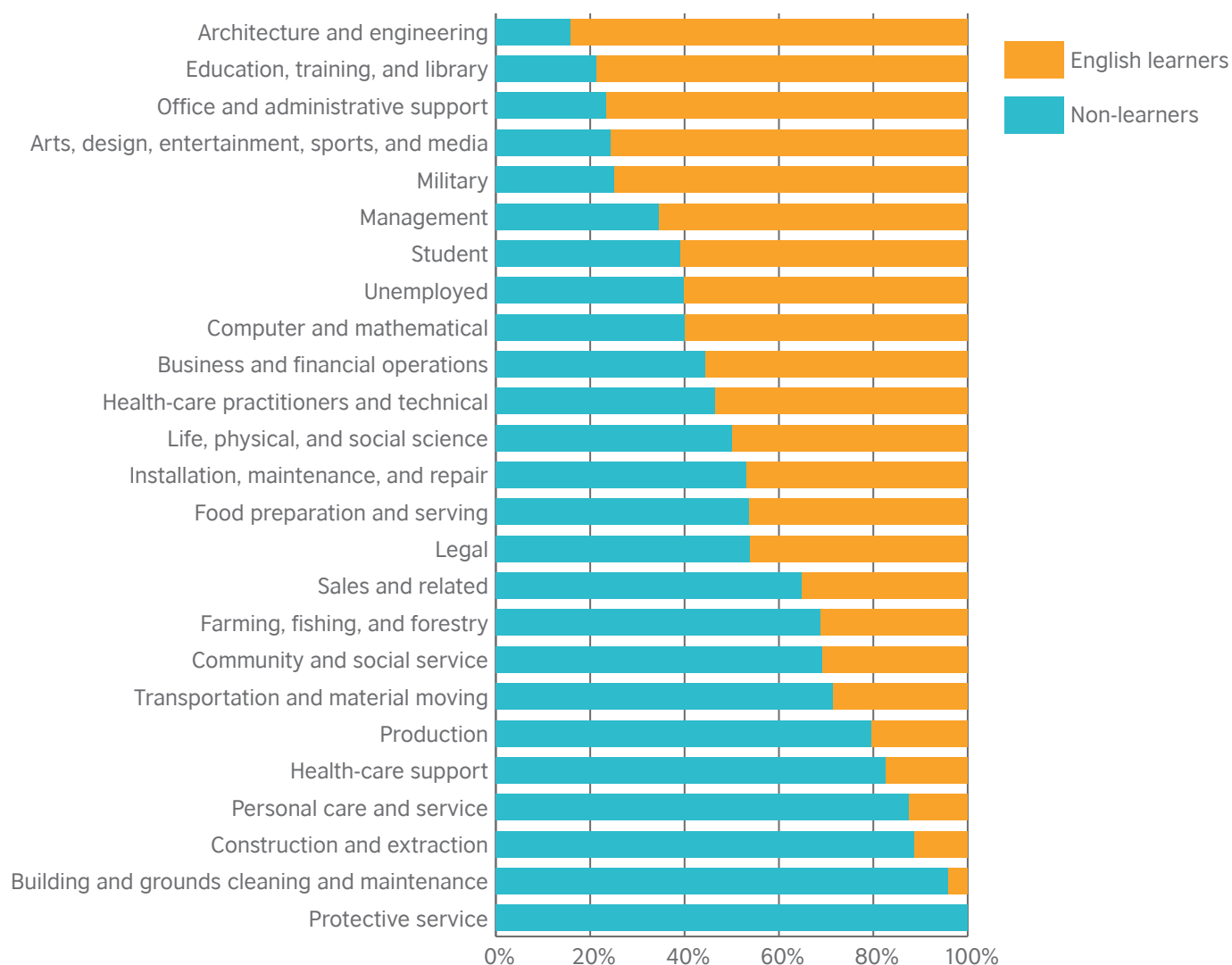
### English learners by province

This chart shows the proportion of respondents in Phase 1 that had studied or were studying English, broken down by their state of residence. It is worth noting that in Zamora-Chinchipe there were fewer than five respondents, meaning that figures for this area are less likely to be representative of the regional population.

Province	Per cent of respondents that have learned English
Azuay	3%
Bolívar	2%
Cañar	2%
Carchi	3%
Chimborazo	3%
Cotopaxi	3%
El Oro	4%
Esmeraldas	3%
Galápagos	1%
Guayas	19%
Imbabura	4%
Loja	3%
Los Ríos	3%
Manabí	5%
Morona-Santiago	2%
Napo	1%
Orellana	2%
Pastaza	1%
Pichincha	28%
Santa Elena	1%
Santo Domingo de los Tsáchilas	2%
Sucumbíos	1%
Tungurahua	2%
Zamora-Chinchipe	0%

## 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 were fewer than five respondents in the protective service industry, figures for this category are less likely to be representative of the sector as a whole.



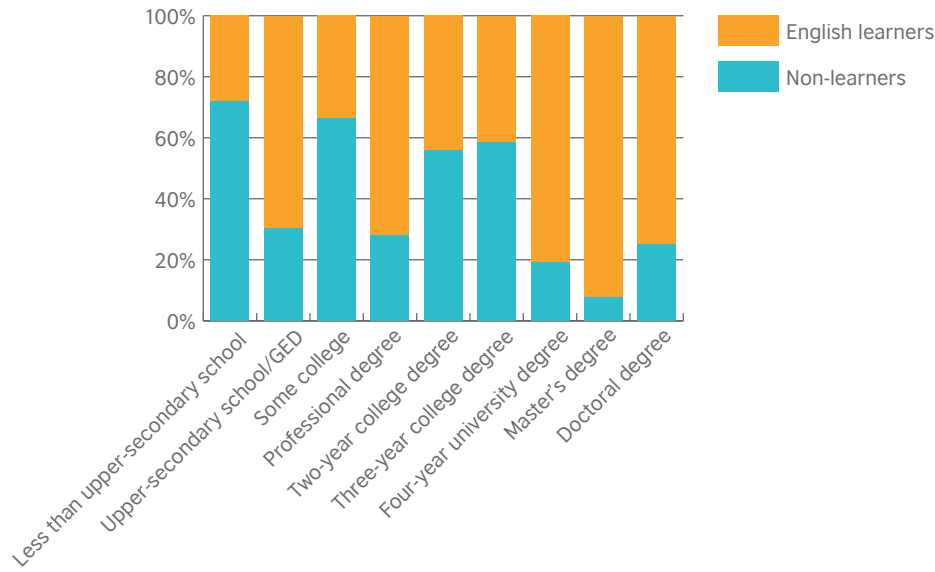
Source: British Council, Education Intelligence, Latin America Databank 2015

There were some noticeable differences between occupations in terms of English language learning. The industries with the largest proportions of English learners were architecture and engineering (84%), education, training and library (79%), office and administrative support (77%), arts, design, entertainment, sports and media (76%) and military (75%). Other industries with high English learner concentrations were management (65%), computer and mathematical (60%), business and financial operations (56%), health-care practitioners and technical (53%) and life, physical and social sciences (50%).

Industries where significantly less than half of respondents were English learners included building and grounds cleaning and maintenance (4%), construction and extraction (11%), personal care and service (13%) and health-care support (17%). Almost equal percentages of the unemployed and students were English learners (60% and 61%, respectively).



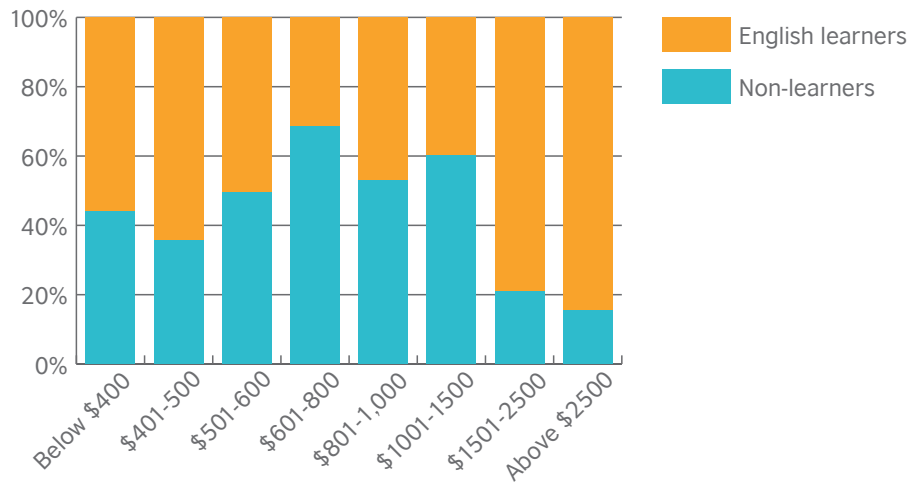
### Education and English language learning



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

Respondents with less than an upper-secondary education were the least likely to have learned English: of this group, just 28 per cent were English learners. This is in stark contrast to those who had completed upper-secondary school, of whom 70 per cent had studied English. Among higher education participants, English learner proportions varied between just 34 per cent for those with some college education to 81 per cent for those with four-year degrees and 92 per cent for those with master’s degrees. Those with two- and three-year college degrees were much less likely to be English learners (44% and 42%, respectively) than those with professional degrees (72%). The number of respondents who had obtained a doctoral degree was not high enough for statistical significance.

### Household income and English language learning



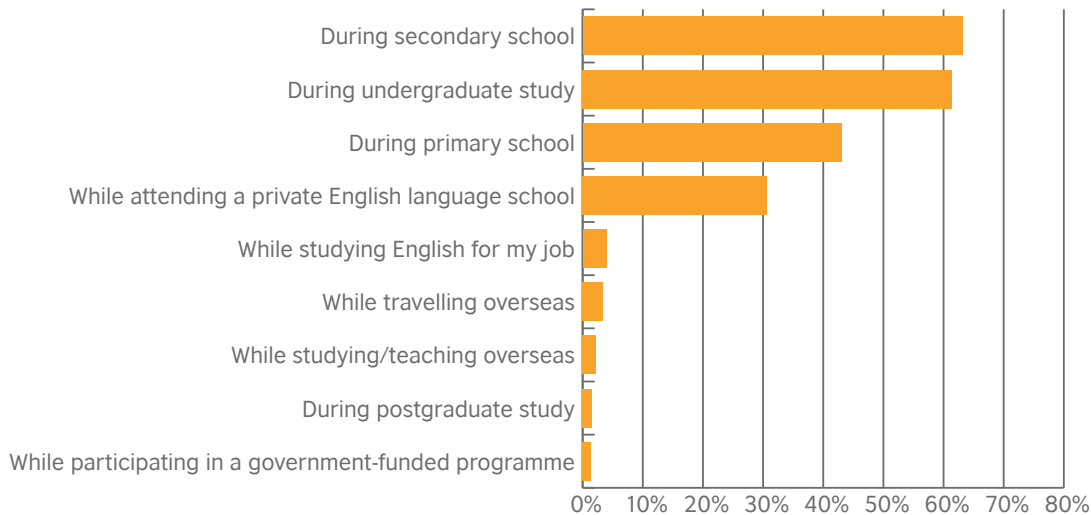
Source: British Council, Education Intelligence, Latin America Databank 2015

There is a general trend for those with higher monthly household income to be more likely to have studied English: 56 per cent of respondents with monthly income below US\$400 were English learners, compared to 85 per cent of respondents with monthly income above \$2,500. However, participants in the middle-income range (US\$601-1,500) go against this trend by showing some of the lowest English learner rates: just one in three respondents with monthly income of US\$601-800 were English learners, while the same was true for 47 per cent of respondents with income of US\$801-1,000 and 40 per cent of respondents with income of US\$1,001-1,500. This may reflect government initiatives to target education quality in general and English language learning in particular in the most vulnerable and low-income parts of the country.

## Motivations for studying English

Of the 1,004 respondents, 502 indicated they had learned or were learning English. In order to better understand their experiences and opinions, we asked these respondents when and why they had learned the language. As respondents may have studied English at various times, they could select more than one answer. We then asked them to evaluate their reading, writing and speaking skills.

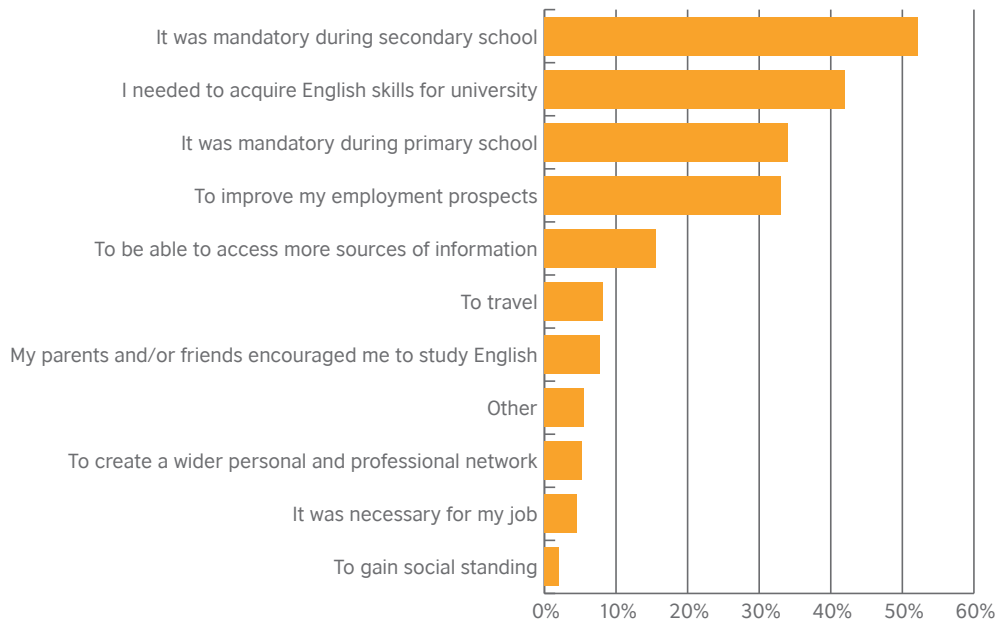
### When did you study English?



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

Ecuadoreans are most likely to have studied English at school: 63 per cent of English learners had studied the language at secondary school, while 61 per cent had studied it at undergraduate level and 43 per cent had studied it at primary school. Around a third of respondents had studied at a private English school (31%); however, very few had learned English overseas (5%) or as part of a government-funded programme (1%).

### Why did you study English?

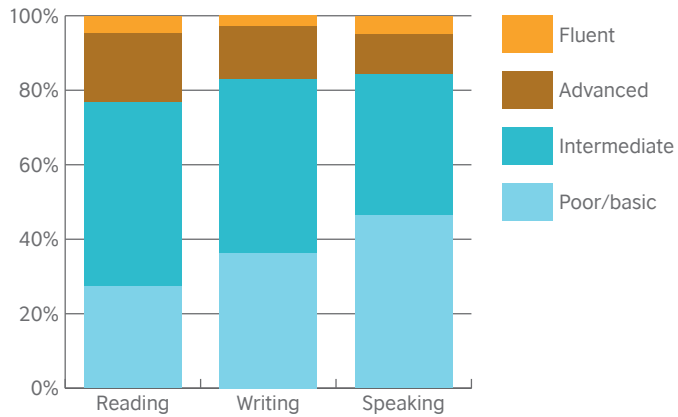


Source: British Council, Education Intelligence, Latin America Databank 2015

Most major motivations for learning English relate to education and employment. More than half of respondents (52%) had learned English because it was mandatory during secondary school, while more than a third (34%) had learned because it was mandatory during primary school. A further large share (42%) had learned because it was necessary for university. While one in three respondents learned English to improve their employment prospects (33%), just five per cent learned because it was necessary for their job, indicating that Ecuadoreans may take a preparatory or pre-emptive approach to learning English for the job market. Other motivations reported less frequently included to access more sources of information (16%), to travel (8%) because parents and/or friends encouraged them (8%) and to gain social standing (2%).

## English proficiency

We asked the 502 English learners in our sample to assess their English skills, choosing from Poor/basic, Intermediate, Advanced and Fluent. The results were particularly interesting when cross-referenced with education levels: respondents with less than an upper-secondary education were much more likely to assess their skills as Poor/basic than those with a four-year degree.



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

Generally, we found that participants were more confident in their acquisition skills (reading and listening) than in their production skills (writing and speaking). Only a small share of respondents (11%) considered themselves to be Advanced or Fluent in reading, writing and speaking English. Participants were least comfortable with their speaking skills, with almost half (46%) rating their skills as Poor/basic and a further 38 per cent classing their skills as Intermediate. Respondents reported similar but slightly better proficiency in writing, and the skill respondents were most confident in was reading.

## English proficiency by occupation

Next, we considered self-reported skills broken down by industry. The scores in the table below represent the ratio of high-proficiency learners (fluent or advanced) to low-proficiency learners (intermediate or poor/basic): the higher the score, the higher the self-rated ability in that occupation. As there were fewer than five respondents in the protective service industry, figures for this category are less likely to be representative of the sector as a whole.

### *Ratio of high- to low-proficiency learners by industry*

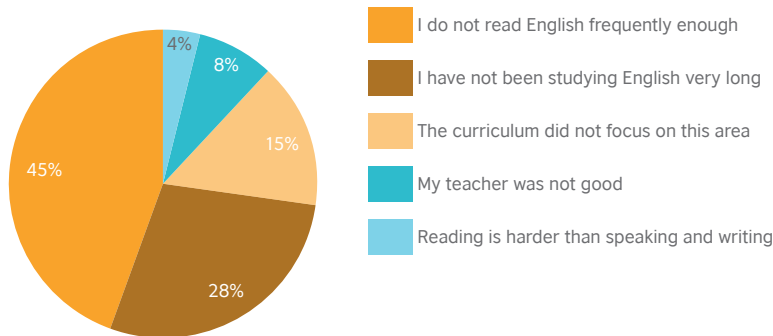
	READING	WRITING	SPEAKING
Architecture and engineering	0.52	0.39	0.23
Arts, design, entertainment, sports and media	0.48	0.35	0.41
Building and grounds cleaning and maintenance	0.00	0.00	0.00
Business and financial operations	0.15	0.03	0.07
Community and social service	0.60	1.00	0.60
Computer and mathematical	0.57	0.22	0.03
Construction and extraction	0.25	0.25	0.67
Education, training and library	0.54	0.48	0.42
Farming, fishing and forestry	0.00	0.25	0.00
Food preparation and serving	0.30	0.00	0.08
Health-care practitioners and technical	0.15	0.15	0.15
Health-care support	0.00	0.00	0.00
Installation, maintenance and repair	0.15	0.07	0.15
Legal	0.00	0.00	0.50
Life, physical and social science	2.00	2.00	2.00
Management	0.44	0.33	0.16
Military	0.20	0.00	0.00
Office and administrative support	0.44	0.16	0.20
Personal care and service	0.00	1.00	1.00
Production	0.33	0.00	0.00
Protective service	0.00	0.00	0.00
Sales and related	0.10	0.07	0.14
Student	0.33	0.25	0.24
Transportation and material moving	0.33	0.33	0.33
Unemployed	0.07	0.07	0.04

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

The occupations that stood out as having larger proportions of highly skilled English learners were life, physical and social science, community and social service, and education, training and library. Interestingly, in the construction and extraction and legal industries, respondents felt much more confident in their speaking skills than in their reading and writing skills. However, there were many industries in which respondents were much more confident in reading than in writing or speaking, including computer and mathematical, management, architecture and engineering, and office and administrative support, and the same was also true for students.

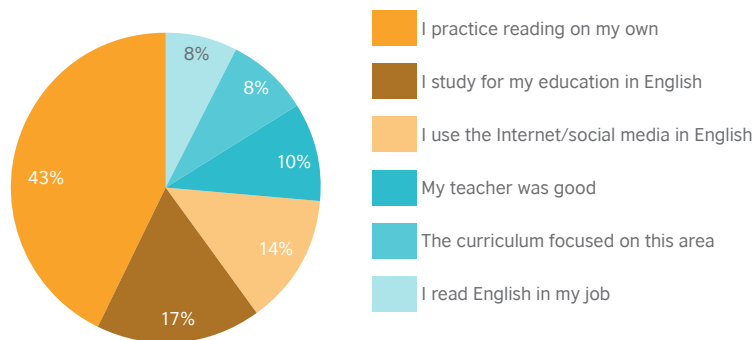
## Reading skills in English

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 (45%) felt that the responsibility for their weak reading skills was their own, citing that they did not read English frequently enough. A further 28 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 (15%) and weak teachers (8%). A small share of respondents (4%) felt that their skills were weak because reading was harder than speaking or writing.

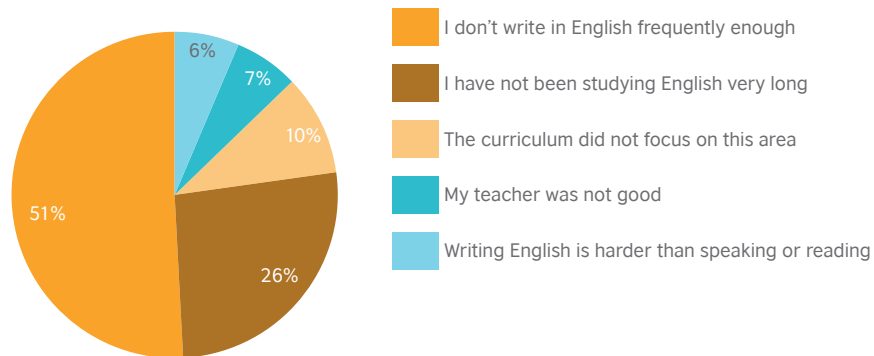


Source: British Council, Education Intelligence, Latin America Databank 2015

Overall, respondents felt that their good reading skills were largely a product of their own efforts as opposed to the strengths or weaknesses of their teachers or education. Significant shares attributed their skills to reading English on their own (43%) and using the Internet and social media in English (14%). Other large shares attributed their skills to their circumstances, including having to read in English as part of their job (8%) or their academic course (17%). Smaller shares attributed their skills to the curriculum (8%) or their teachers (10%).

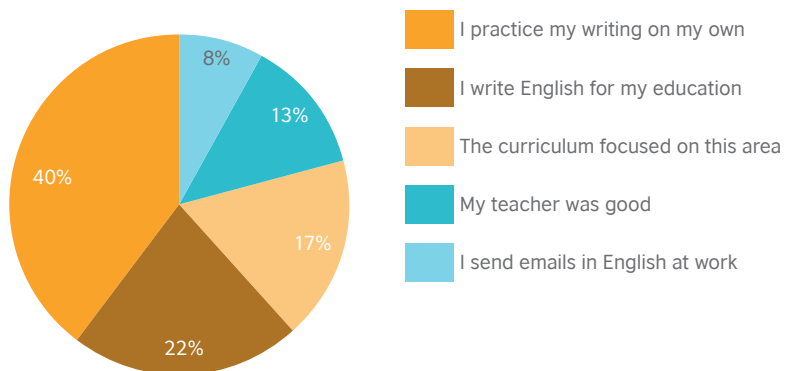
## Writing skills in English

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 majority of respondents felt that this was attributable to a lack of practice: 51 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 (26%). Smaller shares of respondents blamed their weak skills on the curriculum (10%) or their teachers (7%), and a further six per cent felt that it was because writing English was harder than speaking or reading.

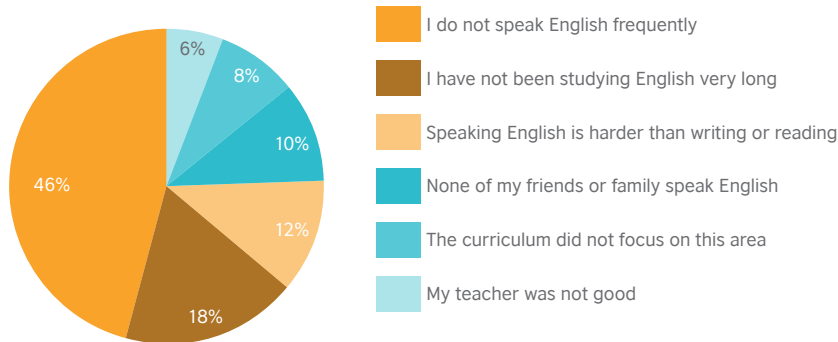


Source: British Council, Education Intelligence, Latin America Databank 2015

Again, those who were confident about their skills attributed this to their own efforts and practice in writing English (40%). However, significant shares attributed this to writing in English for an academic course (22%) or their job (8%). Respondents were more likely to attribute their skills to the education system when it came to writing: 22 per cent attributed them to the curriculum and 13 per cent, to their teachers.

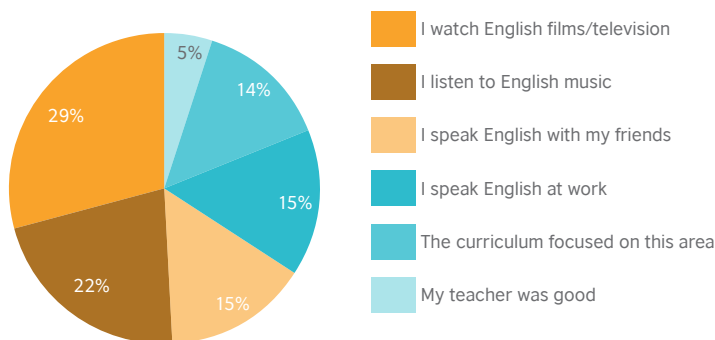
## Speaking skills in English

The respondents in our survey reported much lower confidence in speaking than in reading or writing. We asked respondents to assess the reasons for their weak skills in this area.



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

Again, the largest shares of respondents attributed this to not using the skill frequently enough (46%) and not having been studying English for very long (18%). A significant share attributed their weak speaking skills to their friends or family not speaking English (10%), which further limits the ability to practice, and more than one in ten (12%) felt that it was because speaking was harder than reading or writing. Smaller shares attributed their weak skills to the curriculum (8%) or their teachers (6%).



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

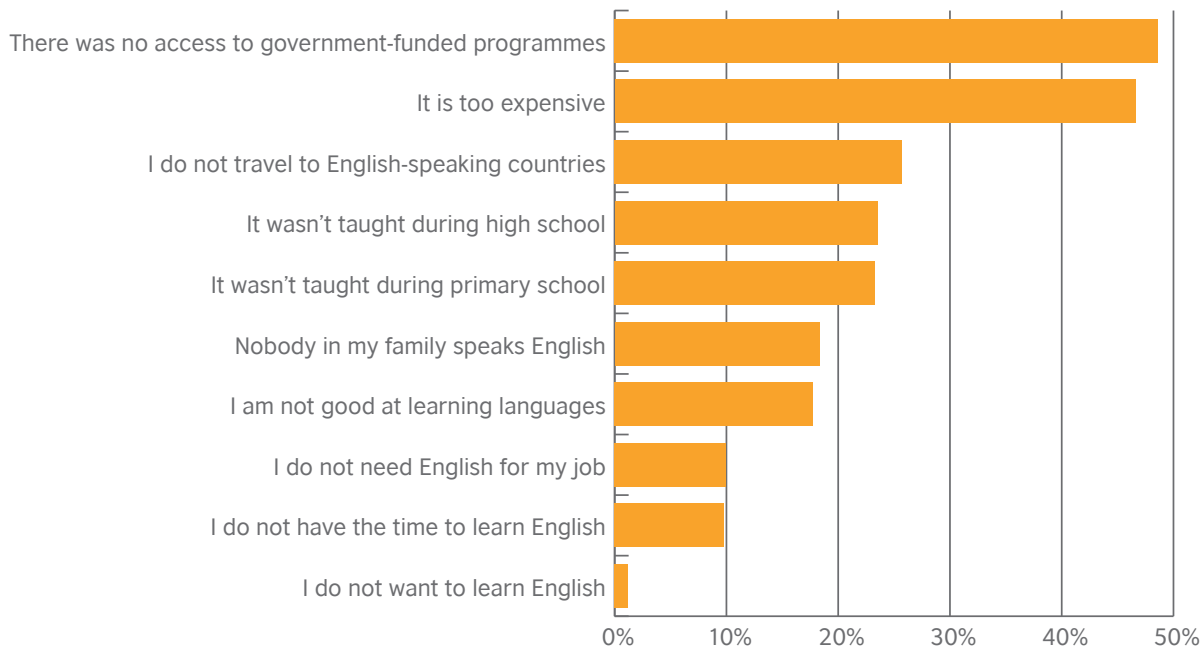
The largest shares of those that felt confident in their English speaking skills (advanced and fluent) said that it was due to social and cultural factors such as watching English language films and television (29%), listening to music with English lyrics (22%) and speaking English with friends (15%) and at work (15%). Only 5 per cent credited their teachers for their strong English speaking skills, while 14 per cent attributed them to the curriculum. This highlights the importance for Ecuadoreans of engaging with the English language in various aspects of life outside of education.



## Barriers to studying English

We asked the 502 respondents who had not learned English about their experiences with the language and what might encourage them to learn the language in the future.

### *Why haven't you learned English?*

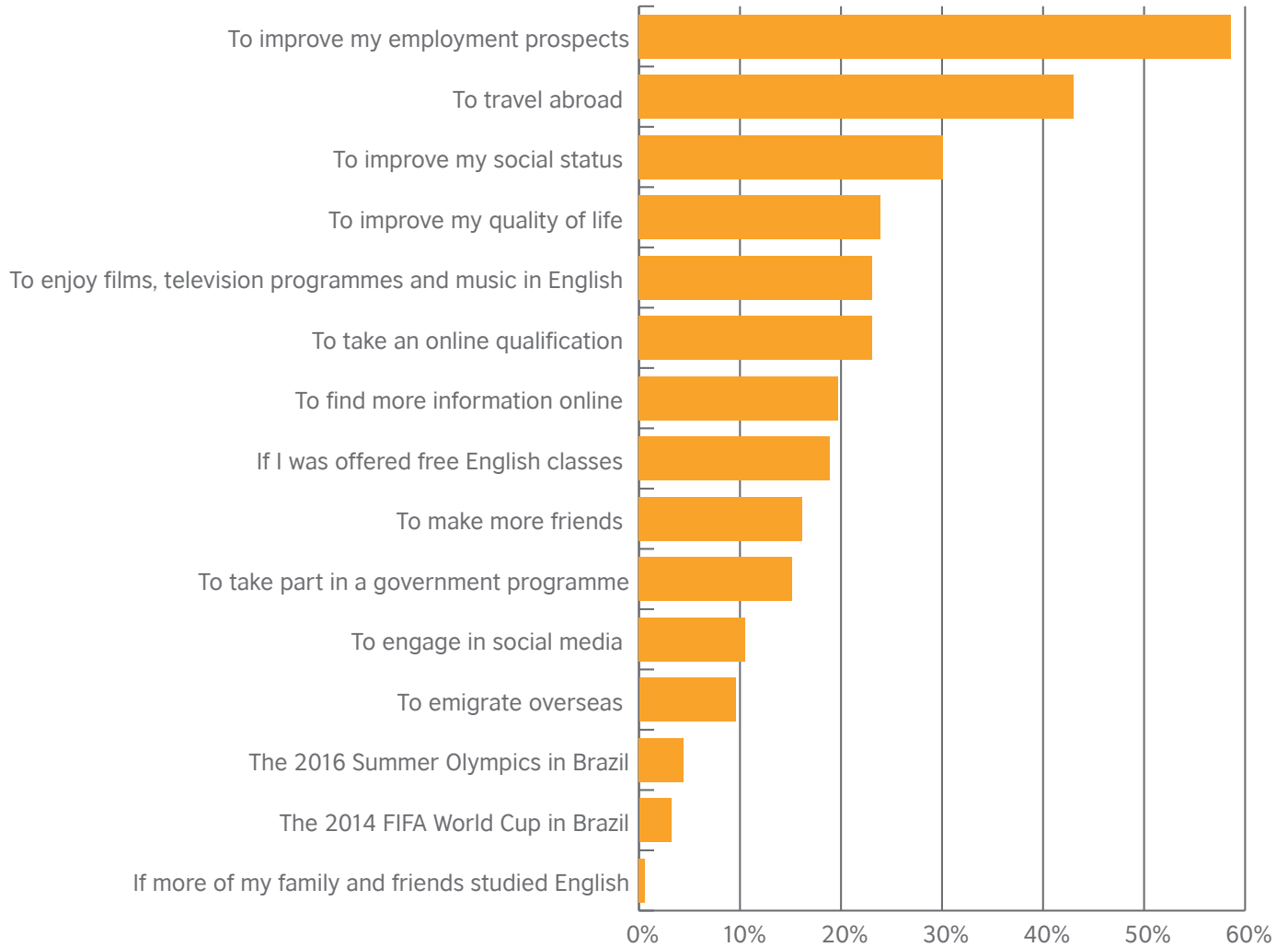


Source: British Council, Education Intelligence, Latin America Databank 2015

The most significant reasons for not learning English were related closely to cost and access to public provision: 49 per cent cited the lack of government-funded English programmes, while 47 per cent attributed cited cost barriers. Further large shares cited not being able to learn during primary school (23%) or secondary school (24%), presumably in the public system, where English language learning is less well established. A further large proportion of participants (26%) reported not learning English because they did not travel to English-speaking countries, which could reflect a lack of need to learn English or a lack of exposure to English language learning opportunities abroad, while just nine per cent cited not needing English for their job. A very small share of respondents reported not having the time or desire to learn English.

### What could motivate you to start learning English?

Non-learners were asked what could incentivise them to start learning English.

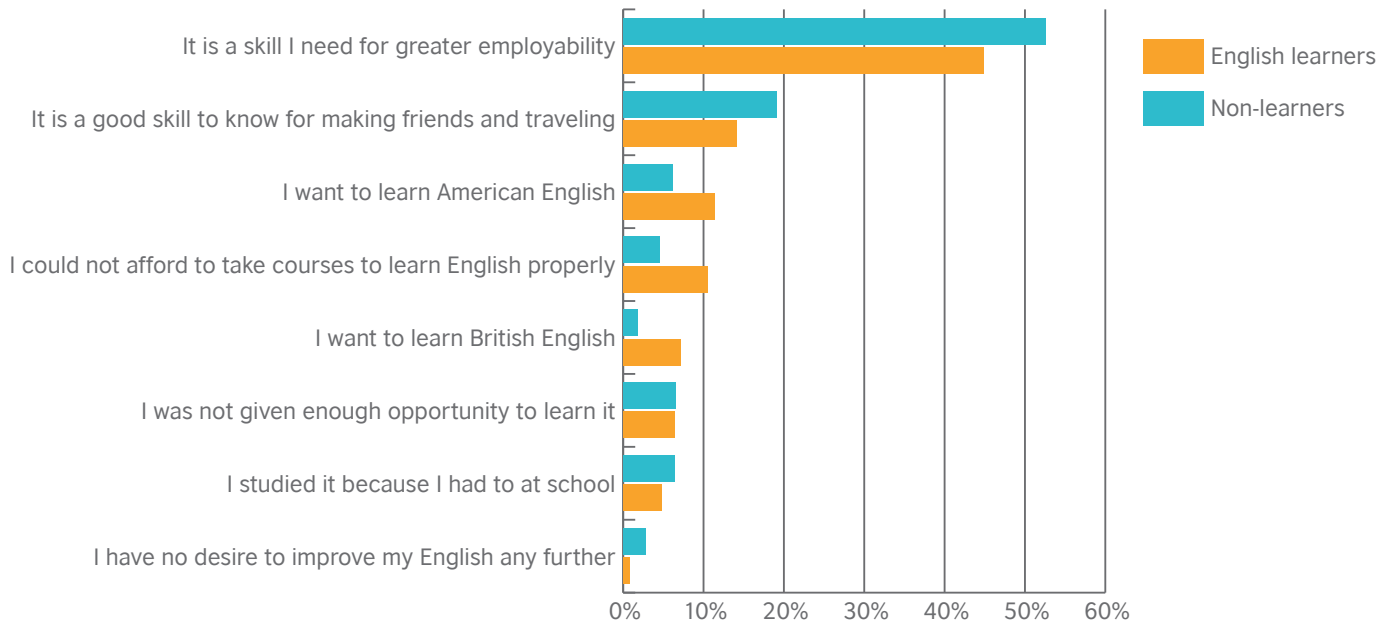


Source: British Council, Education Intelligence, Latin America Databank 2015

The largest share of respondents (59%) would be motivated to learn English if they knew it would improve their employment prospects; however, large shares would also be motivated by more personal factors, including being able to travel abroad (43%) or emigrate (10%), to improve social status (30%) or quality of life (24%), to enjoy films, television programmes and music in English (23%) or to find more information online (20%). Factors such as major international events within the region were given little importance. Interestingly, while 49 per cent of respondents attributed their non-learner status to a lack of government-funded courses, just 19 per cent would be motivated to study if such courses were available. This indicates that Ecuadoreans may require more significant motivators, such as employment, than simply access to free or low-cost courses.

### 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.

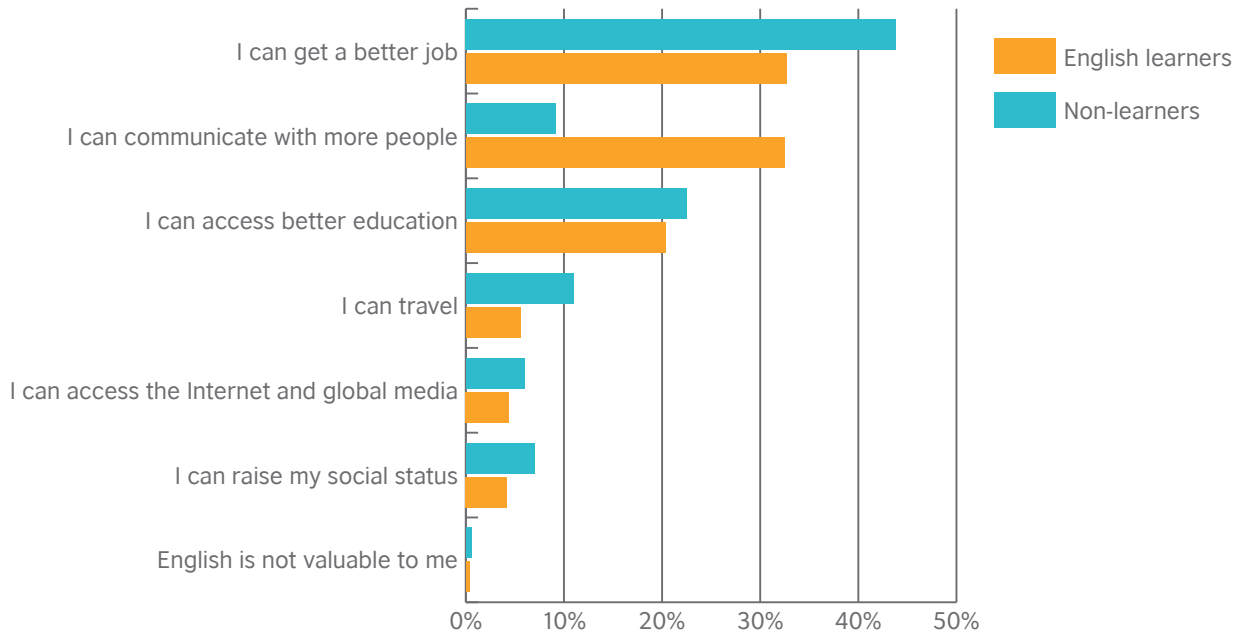


Source: British Council, Education Intelligence, Latin America Databank 2015

The views of non-learners largely matched those of English learners: the largest share of each group felt that English was a necessary skill for employability (45% and 53%, respectively). Both groups also felt a preference for learning American English over British English and recognised the importance of English for travelling and making friends (19% of non-learners and 14% of English learners). This sentiment was echoed in interviews, where young English students reported that they wanted to learn to communicate with other people during their travels. Very few English learners (1%) and non-learners (3%) had no desire to improve their English, and similarly small numbers had only studied the language because they had to in school.

## 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

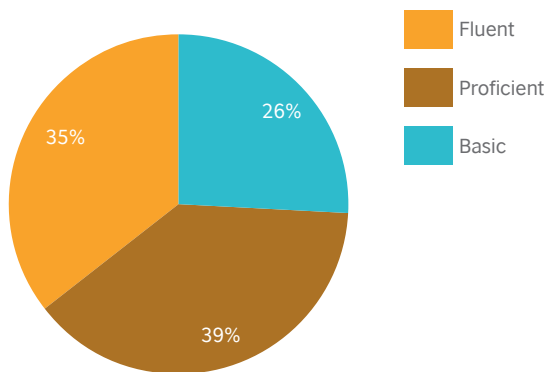
The main value expressed by both English learners and non-learners was that English is a valuable tool for employability (33% and 44%, respectively). However, English learners were much more likely than non-learners to value English as a communication tool (32% versus 9%); this may highlight the increased awareness of opportunities for intercultural interaction that comes from having learned another language. English as tool for education was the second most popular value among non-learners, underlining the idea among this group that English is a means of opening doors - or that a lack of English is a barrier to personal development. Non-learners were also more likely than English learners to value the language as a status symbol (7% compared to 4%). Just one per cent of non-learners and less than one per cent of English learners felt that English had no personal value.

# Employer demand for English

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

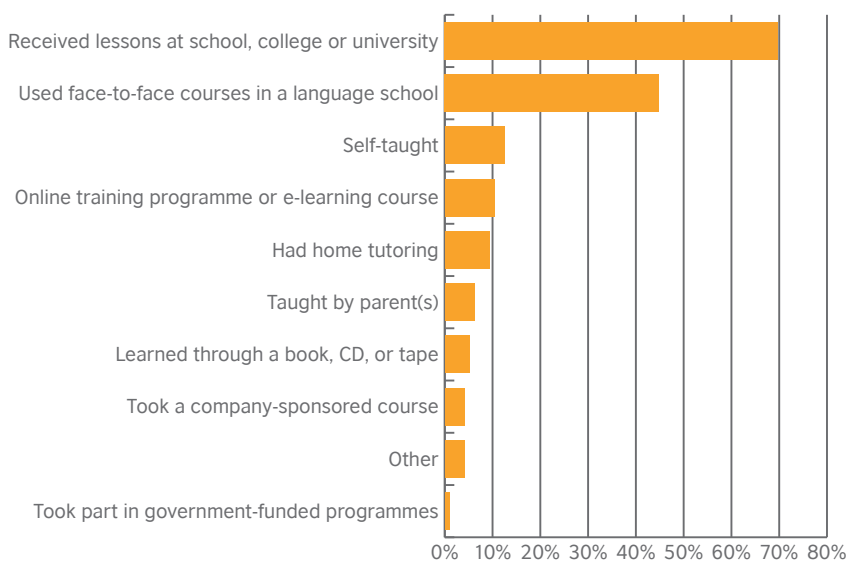
## Management profile

The individuals who participated in the survey were employed at the managerial or executive level, meaning that they had attained high employment status that others often aspire to. Over 80 per cent of these respondents worked in management, either as managing directors or in general management or human resources.



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

The respondents were all native Spanish speakers, of whom 93 per cent had studied English. Among these English learners, the vast majority (74%) considered themselves to be fluent or proficient.



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

These respondents were asked where they had learned English. Most indicated that they had received lessons at school, college or university (70%), but a sizable portion had also attended language schools (45%). Very few managers had taken part in company-sponsored courses (4%) or government-funded programmes (1%). Around 95 per cent of English-learner managers indicated that they would like to study English further in the future.

## Employer analysis

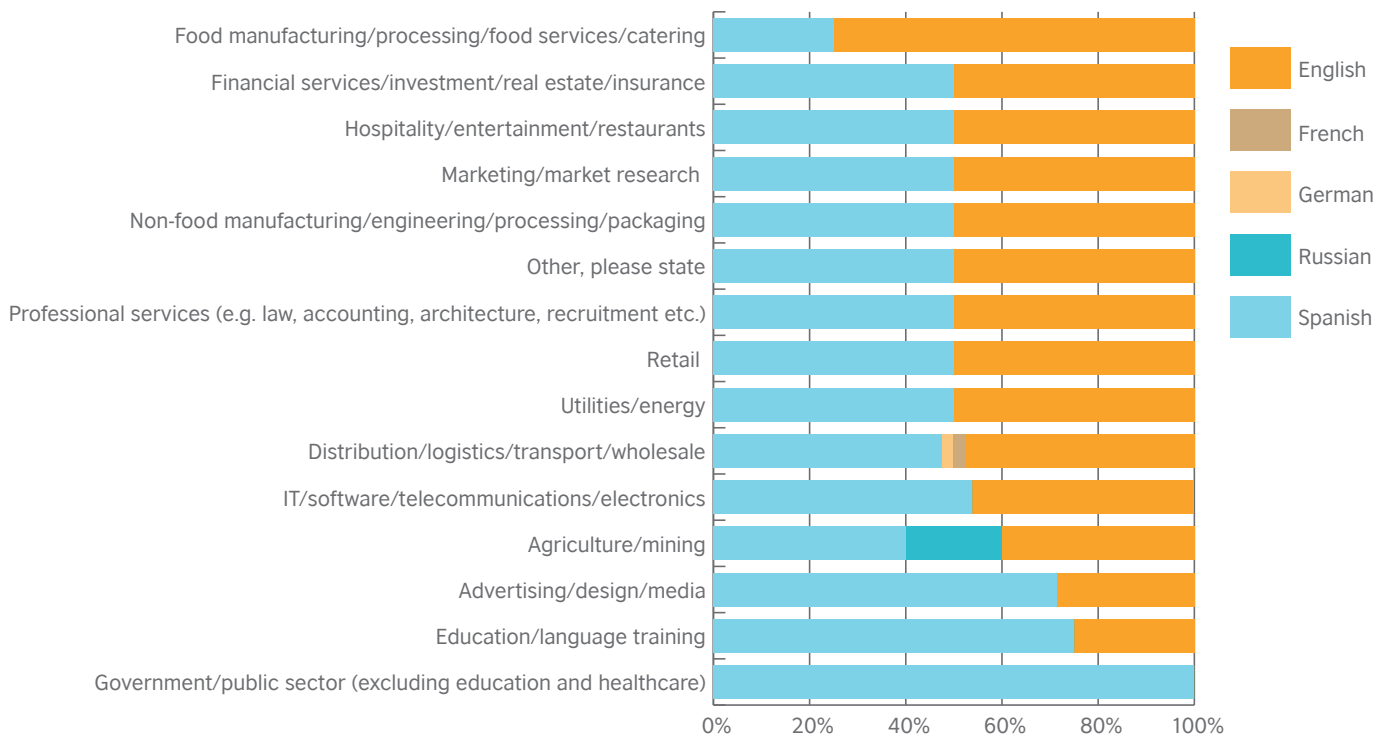
Around half of the companies represented in the survey were from Pichincha state, while smaller shares were located in Guayas (20%), Azuay (15%), Loja (4%) and El Oro (3%). Just one in ten companies were based in rural areas, and 52 per cent were based in the capital city, Quito. The companies varied in size, with the largest share (59%) having one to 49 employees and just 21 per cent having more than 100 employees.

INDUSTRY	NUMBER OF RESPONDENTS
Distribution/logistics/transport/wholesale	25
Hospitality/entertainment/restaurants	21
Marketing/market research	10
Other	10
IT/software/telecommunications/electronics	8
Advertising/design/media	5
Professional services (e.g. law, accounting, architecture, recruitment etc.)	5
Education/language training	3
Food manufacturing/processing/food services/catering	3
Non-food manufacturing/engineering/processing/packaging	3
Agriculture/mining	2
Financial services/investment/real estate/insurance	2
Government/public sector (excluding education and health care)	1
Retail	1
Utilities/energy	1

The largest shares of employers represented firms in distribution, logistics, transport and wholesale (25%) and hospitality, entertainment and restaurants (21%), although there was representation from a wide range of industries overall.

## Languages used

To better understand the role of English in industry in Ecuador, we asked respondents what language was generally used internally in their company. The most common language used internally was Spanish, and just two per cent of companies predominantly used English internally. The number of companies that generally used English externally was much higher than the number that used it internally: 48 per cent of companies surveyed tended to use English externally, compared to 51 per cent that predominantly used Spanish externally. There were also a handful of companies that predominantly used other language such as French, German and Russian with external agencies.

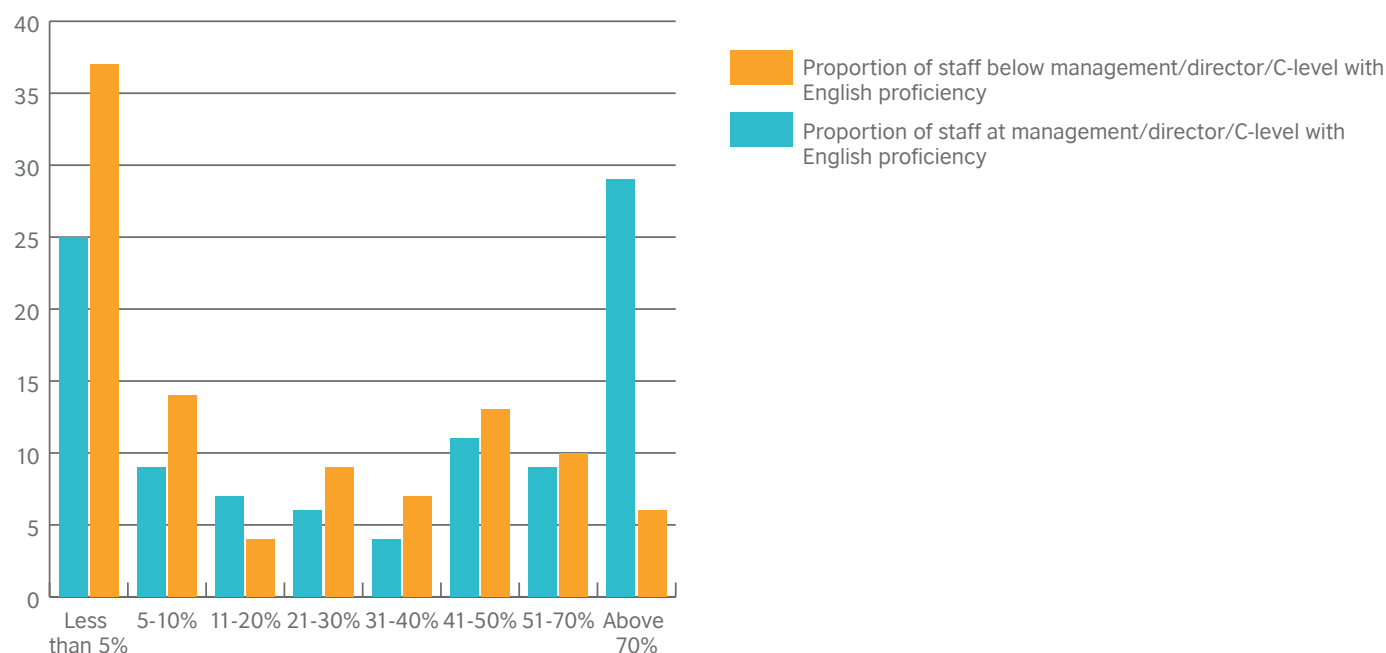


Source: British Council, Education Intelligence, Latin America Databank 2015

The industries that were more likely to use Spanish externally included government and public sector, advertising, design and media and, interestingly, education and language training. The industry that was the most likely to use English externally - and by a long measure - was food manufacturing, processing, food services and catering. The majority of industries were fairly evenly divided on whether English or Spanish was the main language used externally.

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

### Percentage of employees proficient in English



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

Employers largely reported that English proficiency was higher among management/director/C-level staff: 29 per cent of employers felt that more than 70 per cent of managerial staff in their company were proficient in English, while just six per cent felt that the same was true for their non-managerial staff. However, a further large share of employers (25%) reported that less than five per cent of managerial staff were proficient in English, indicating that there was significant variation in the English language skills of managerial staff in the companies surveyed. The largest share of employers (37%) reported that fewer than five per cent of non-managerial staff were proficient in English.

### Top industries that offer English training and development

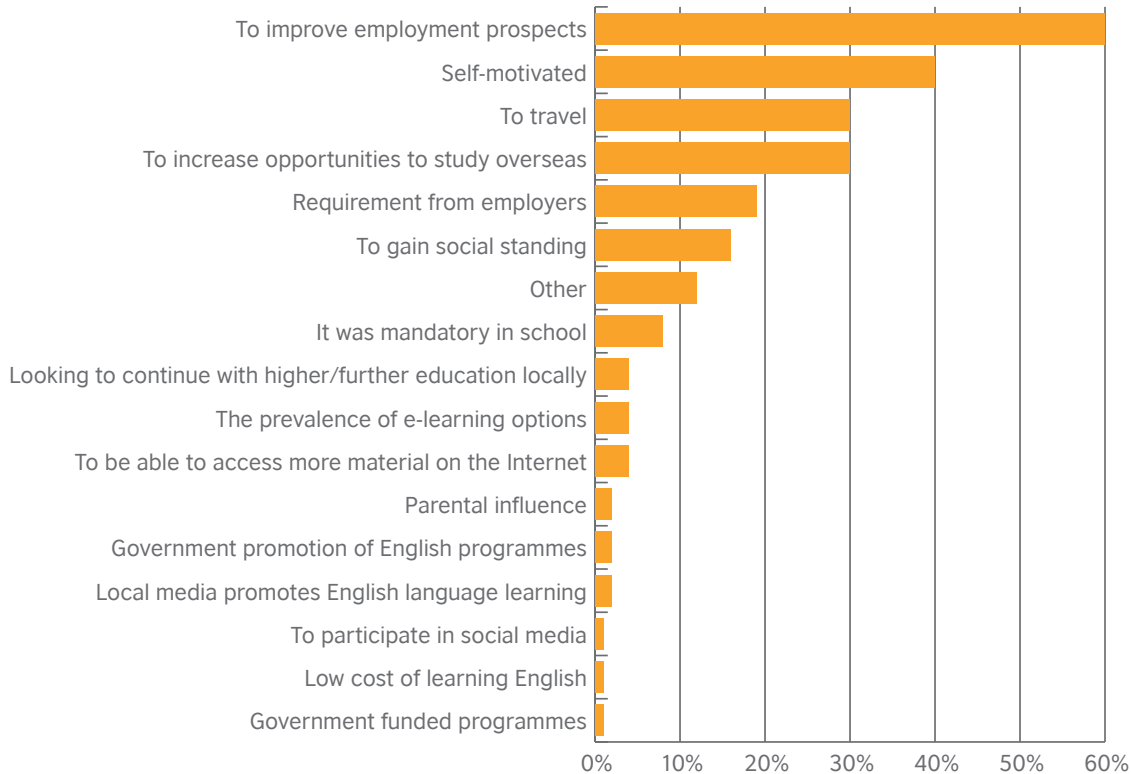
Distribution/logistics/transport/wholesale	25%
Marketing/market research	25%
Education/language training	13%
Advertising/design/media	6%
Agriculture/mining	6%
Hospitality/entertainment/restaurants	6%
Non-food manufacturing/engineering/processing/packaging	6%
Other	6%
Professional services (e.g. law, accounting, architecture, recruitment etc.)	6%

We asked respondents whether their companies offered in-house professional English language training or development. The industries that were most likely to offer training were distribution, logistics, transport and wholesale, marketing and marketing research, and education and language training. However, overall, just 17 per cent of respondents indicated that their company provided English language training opportunities. Of these companies, around 50 per cent offered internal English programmes, while 19 per cent had partnerships with external English training companies.



## Employers' views on English language learning

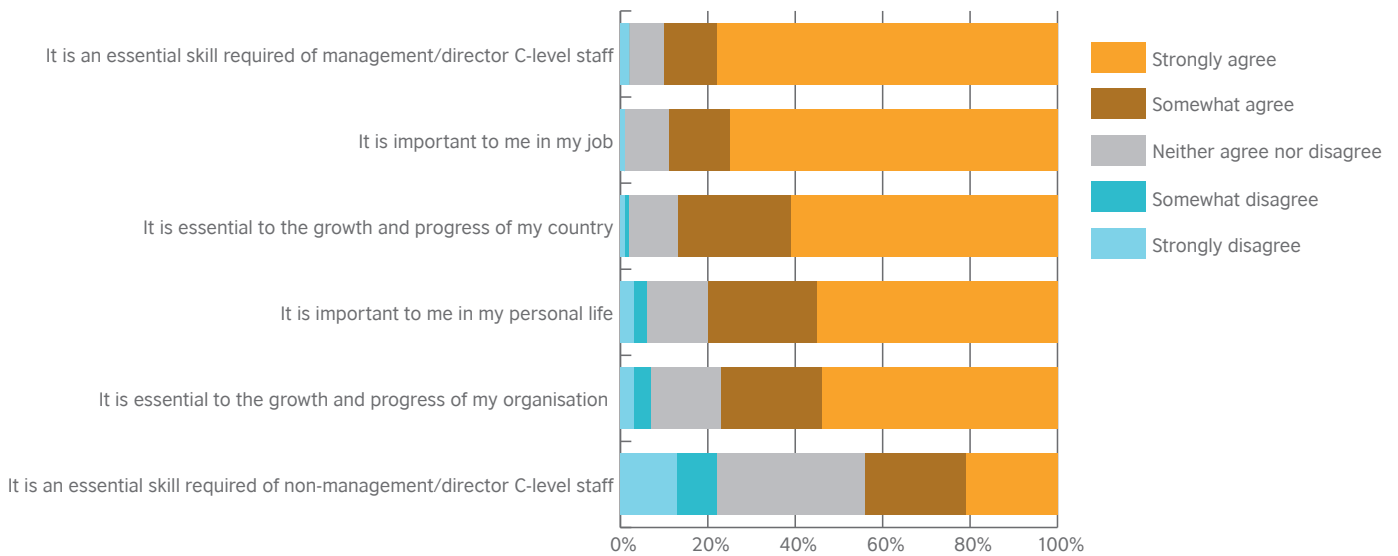
We asked respondents their personal views (as opposed to general company views) on the main reasons for Ecuadoreans to want to learn English. Respondents could choose up to three responses.



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

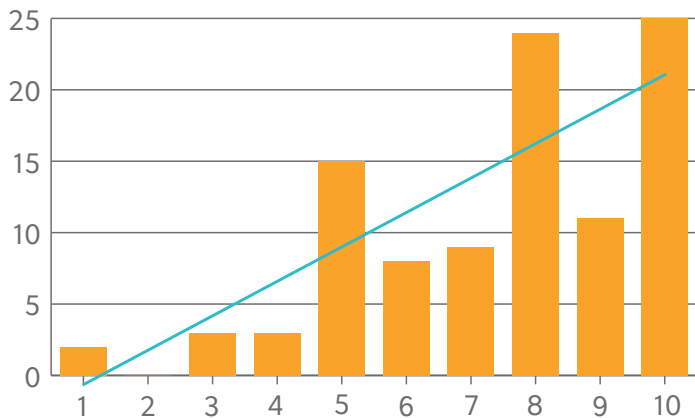
The view reported the most often was that Ecuadoreans learned English to improve their employment prospects (60%). This mirrors the findings of our general population survey. A large share of employers (40%) believed that Ecuadoreans learned English for personal motivations, while further large shares reported that English language learning was motivated by the opportunity to travel (30%) or study overseas (30%). Few managers (8%) felt that Ecuadorean learned English solely because it is mandatory in schools, but 19 per cent felt Ecuadoreans learned because it was required by employers.

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



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

The findings show that employers tend to have strong and positive opinions about English language learning. They further illustrate some key differences in employers' perceptions of English language learning, particularly as it relates to their employees: while most respondents (78%) agreed strongly that English is an essential skill for managerial staff, just 21 per cent agreed strongly that it is an essential skill for non-managerial staff. In fact, more than 50 per cent of employers had no opinion on or disagreed with the idea that English is essential for non-managerial staff. Conversely, the vast majority of managers agreed or agreed strongly that English is essential for their job (89%) or personal life (80%) and that it is important for the growth of their country (87%) or their organisation (76%).



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

We asked employers to rate the importance of English knowledge on a scale from one (not important) to ten (essential). The largest shares of respondents, by a long measure, rated English as 'essential' (10) or 'very important' (8), and very few employers rated English as 'not important'.



To better understand why employers place value on English language, we asked respondents to explain why they thought English was or was not essential. The above word cloud is representative of the answers received: the size of a word signifies how frequently respondents used it in their answers. The words that were most prominent, besides 'English', were 'language', 'important', 'foreign', 'company', 'customers', 'need', 'communication', 'business' and 'necessary'. This underlines the belief among Ecuadorean employers that English is immediately necessary for business and national development and is an essential tool for obtaining and maintaining client relationships.

# Factors affecting English language learning

## Education governance and English reforms

President Correa's goal to improve quality and equity in public education has been supported by good planning and decisive action, such as the removal of tuition fees in public undergraduate education in 2008. The government has made it very clear that education is a priority, and this has been recognised, accepted and applauded by the public. The government's commitment to education has been highlighted by the recent economic slowdown on the back of falling oil prices: while there have been spending reductions in most areas, the education budget has seen only nominal cuts. Policies and reforms have highlighted education as a means of helping Ecuador develop equality, solidarity and multiculturalism as well as the skills needed to directly benefit the country's economy and improve well-being. As such, education is now seen as an important investment in the country's future rather than as a business sector. While many countries in Latin America have chosen a more decentralised model, Ecuador is pursuing centralised education governance. The president's active role in education has been met with criticism by some; however, Correa is largely seen as an active change agent capable of addressing Ecuador's legacy of inequality and poverty, and there is evidence that national sentiment is beginning to replace regional and local affiliation. The New Good Living Plan 2013-2017 follows on from the 2009-2013 plan and aims to improve quality of life for Ecuadorean families by eradicating poverty, changing the production matrix (transforming production and consumption) and moving towards a society that embraces national solidarity and justice.<sup>41</sup> Government policy on English language learning has been an important part of the reform process, and outside of native languages, no other language has received such attention. As in all democratic countries, policies are likely to change with successive governments, and education policy may change yet again following the upcoming elections.

## Economic prioritisation

Economic prioritisation reflects the government's interest in averting another economic crisis and diversifying the economy away from oil. This has various implications for education and English language learning. In an attempt to preserve Ecuadorean industry, the country is now relying increasingly on Ecuadorean-made items and local human capital. As such, there are now some constraints on bringing in teachers from abroad, and this is exacerbating the existing shortage of properly qualified English language teachers. To prevent capital outflows, the government has implemented a five per cent tax on funds going out of the country. This presents a potential barrier to study abroad: while higher education is tax deductible, this can be challenging in practice.

## National production matrix

Ecuador's economy has grown in recent years on the back of increased revenues from oil and commodities such as bananas, cacao, seafood and cut flowers. The country's two main sources of income are currently oil, which accounts for 44 per cent of government revenue, and remittances. However, the government wants to reduce the country's dependence on oil by diversifying into other industries and is supporting the development of small and medium-sized enterprises. By changing the production matrix, the government hopes to generate more wealth, achieve more sustainable development and encourage the growth of human capital, technology and knowledge. The government has prioritised 16 economic sectors, and there is already evidence that the reformed TVET sector is producing more workers for the valuable fishing, transport and tourism sectors. The tourism industry is growing rapidly: tourism receipts grew by 7.1 per cent in 2014 and are expected to rise by 5.9 per cent again in 2015, driven in part by a boom in eco-tourism. The government is also looking at ways to transfer the 40 per cent of the labour force that currently works in the informal sector into formal employment. As the job market expands and diversifies into new, outward-facing industries, English language learning is expected to play an increasingly important role in the economy: 87 per cent of the employers in our survey already feel that English is essential for national development.

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<sup>41</sup> "Ecuador: The challenges for the 2013-2017 'Good Living' plan." *Pressenza*. 17 March 2013.

## International involvement

Engagement with international partners through foreign direct investment in public and private projects, such as the building of dams by Chinese partners, is another important factor influencing English language learning in Ecuador. The 'transfer of technology and knowledge through international cooperation' was integral to the 2009-2013 Good Living Plan, and the government is keen to promote this trend as it looks to develop its export market and raise its international profile. While partnerships are naturally strongest with the US, reflecting geographical proximity and market familiarity, English is seen as a means of expanding into new markets where English is not necessarily the native language but is the accepted lingua franca. English language skills are seen as an essential pull factor for foreign investors. Similarly, English has been recognised as being important for improving the international visibility of valuable, high-potential economic sectors such as agriculture; this could have the dual benefit of raising human capital and overall economic conditions in rural areas.

## Diversity

Ecuador is a multilingual, multicultural country that is home to indigenous peoples, blacks, mestizos and numerous minority migrant groups. The indigenous population is clustered in the Costa, Sierra and Amazon regions, each of which has its own languages and culture. The right to learn in the mother tongue is recognised in the National Constitution (Article 27). As a result of this diversity, education systems and cultures differ from region to region. This presents a challenge for the implementation of national education reforms and English language learning initiatives. This is being overcome through regional and local government representation as well as private education proliferation in rural areas. These areas are also being targeted by international education organisations such as World Teach, which provides free English language lessons, often through rural universities. Exposure to and demand for English language learning in more remote areas is expected to develop as companies in fields such as computer programming look increasingly to establish bases outside of major cities.

## Scholarship programmes

The government is keen to promote the sustainable international mobility of students and faculty. However, as the 2009-2013 Good Living Plan states, 'specific policies must be issued to avoid the process of brain drain and to take actions to repatriate highly educated Ecuadoreans'. As such, the government is encouraging regional and international academic exchange by offering bonded scholarships, mainly at postgraduate level, as well as specific programmes for lecturers and researchers. These scholarship programmes often require a certain level of English or have associated English language learning expectations by the end of the programme. SENESCYT scholarships include the Universities of Excellence (Universidades de Excelencia) and Teach English scholarships, which are described above, as well as the Open Call for Scholarships programme for postgraduate study. Current obstacles to scholarship uptake - which has been low - include the high English language requirements and low awareness.

## Compulsory English language learning

The current shortage of high-quality English teachers and the general English language skills deficit among the wider population have been attributed to the late age at which English is introduced in the school curriculum. Research has shown that language acquisition is easier from a younger age and that early exposure enhances future uptake. The move to introduce mandatory English from Grade 8 was met with disappointment by many, and the starting point should be lowered to Grade 2 in the coming years. While this move had been welcomed from the point of view of learner development, it is expected to exacerbate the current English teacher shortage.

## Income inequality

Ecuador continues to struggle with poverty and income inequality. The country's poorest socio-economic groups are also its largest: in 2013; groups E and D accounted for 48.6 per cent and 28.6 per cent of the population aged over 15, respectively. The lowest socio-economic group, category E, is also home to largest proportions of people aged 15-19 and over 65. The government is working to reduce poverty and income inequality and has increased the minimum wage in recent years, with a target figure of US\$500 per month.

Income inequality results in striking differences in spending patterns. In 2013, the richest ten per cent of the population spent more than 1,000 times more on education in total than the poorest 10 per cent. The latest official household spending survey shows that the average household allocates 4.4 per cent of total monthly expenditure for education; among the richest ten per cent of households, this proportion increases to 7.1 per cent.<sup>42</sup> As income and aspirations rise, demand for education is increasing: over 2008-2013, the best-performing consumer spending markets were communications and education, with real growth of 33 per cent and 31.3 per cent, respectively.

Our survey results show that a lack of government-funded programmes and the high cost of study are the two most common reasons for Ecuadoreans not to learn English. With an average monthly wage of US\$350, Ecuadoreans in the lower and lower-middle classes are largely unable to afford private English language training, the cost of which can exceed US\$40 per lesson. Similarly, while private schools tend to offer high-quality education, including English language training, these schools are out of reach for much of the population. As such, the lowest socio-economic groups are dependent on the under-resourced public education system for all of their learning needs. In addition to being able to afford quality English language training, higher-income families are also more likely to be able to travel, increasing their exposure to English and, potentially, the value they place on learning a foreign language.

## Teaching training

Ecuador currently has a shortage of experienced, properly-trained English language teachers. This stems from poor-quality teacher training programmes as well as quality assurance measures that have resulted in the dismissal of sub-standard teachers. Even among trained teachers, knowledge can be very theoretical and teachers often lack the language or pedagogical skills to transfer their knowledge to students. As a result, there tends to be more focus on reading and listening than on productive skills such as speaking. Large class sizes and poor training also mean that Spanish is often used as the teaching medium in English language lessons. Overall, poor teaching results in low learning outcomes and the development of negative associations with language learning.

The Ministry of Education has recognised this and is attempting to address the issue through reforms and programmes such as the Go Teacher scholarships, which were launched in 2013. Concerns with this programme include ineligibility for teachers aged over 45, high English language requirements, low motivation, which is driven in part by low salaries, and a lack of time for professional development due to school and private tutoring commitments as well as family and personal obligations. There is also concern that sending individual teachers abroad may be less productive than sending colleagues in groups. However, anecdotal reports suggest that the exposure to native English teachers and culture gained through the programme is invaluable and that teachers have returned with improved English language and pedagogical skills. While the Ministry of Education is taking significant steps in this area, there is evidence that stakeholders are not always aware of government initiatives and reforms, meaning that improving communication could also be a priority.

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<sup>42</sup> "Encuesta Nacional de Ingresos y Gastos de los Hogares Urbanos y Rurales." Instituto Nacional de Estadística y Censos. Retrieved at <http://www.ecuadorencifras.gob.ec/encuesta-nacional-de-ingresos-y-gastos-de-los-hogares-urbanos-y-rurales/>.

## Employability

There is high demand for English language skills in certain jobs, including IT (for software development and programming), engineering (for raising productivity), medicine (to stay informed about advancements in treatment and research) and tourism (for communicating with tourists). Our survey results show that increased employability is one of the main motivators for and values associated with learning English, and this belief is particularly strong among non-learners. This view was seconded by employers. However, the realities of the job market are somewhat different: while English skills are perceived to be associated with attractive, well-paying jobs and job openings may demand a high or intermediate level of spoken English, most companies accept and demonstrate much lower English proficiency in practice. This is reinforced by our survey of employers, who largely reported very low English proficiency among non-managerial staff. Similarly, more than 50 per cent of employers did not have an opinion on or disagreed with the idea that English is essential for staff below managerial level. Some companies - and 17 per cent of the companies we surveyed - offer English language training and development; however, there remains a fear among employers that employees will take advantage of often-costly training and then leave the company, taking their new skills with them. The corporate training market may remain subdued until this attitude changes, and in the meantime, the onus is likely to remain on potential employees to improve their language skills privately as required.

## University-level drivers

Ecuador needs more quality researchers and has set high targets for university lecturer qualification rates for the coming years. To meet its target for PhD holders, Ecuador has partnered with Mexico to educate some of its doctoral candidates abroad. There are concerns that rising standards in the academic profession, combined with low salaries, could create barriers to postgraduate study and act as a deterrent for potential Ecuadorean innovators and sector leaders. Universities do not have English language entry requirements and require only a minimum level of English for graduation and careers in academia. The higher education entrance exam, ENES, does not currently test for English, in spite of the fact that English is largely accepted as the international language of research, including at conferences and major institutes. Nonetheless, our survey results showed that acquiring English skills for university was the second most popular reason for studying English (42%) and 61 per cent of English learners had studied the language at university.

## Technology

Exposure to English is increasing through technology as an increasing number of Ecuadoreans have access to English programmes, music and educational materials through television, radio and the Internet - channels that our survey results show are vital for maintaining and improving English skills and speaking skills in particular. As Internet penetration is higher in Ecuador than in many regional neighbours, the country has an opportunity to take advantage of this market. The government is looking to ICT as a possible solution for poor-performing public schools, and ICT in the classroom is part of the Ten-year Plan for Education 2006-2015. One technology-related scheme is the Más Tecnología programme in Guayaquil, which provides computers and technology training for schools to aid learning in mathematics and languages; however, there is evidence that while ICT in the classroom may benefit mathematics learning, it has a limited effect on language learning.

# Opportunities

The education system, including English language learning provision, has received increased attention and resources under the current government. English has been prioritised as a means of improving Ecuador's economic situation, human capital and general well-being. An awareness of the issues, barriers, gaps and opportunities in this market may be advantageous for market observers, and we summarise these points below:

- the government has identified a number of industries for growth in order to reduce its dependence on oil; as these industries are largely outward facing, potential employees will need English language skills in order to engage with the international market as well as foreign investors
- Ecuador's current policies to protect the economy and avert another crisis have been economically beneficial and have promoted national sentiment but have also hindered study abroad and the recruitment of international teachers
- scholarships for Ecuadoreans are abundant, but as few Ecuadorean students take international standardised tests, not enough students are able to benefit from these programmes; as awareness of and interest in scholarships increase, demand for these exams and the related preparatory courses is expected to grow
- scholarships for teacher training overseas currently exclude older teachers and those with children
- public and private investment in more rural parts of Ecuador should lead to increasing demand for English in these areas
- mandatory English study has been introduced from Grade 8; however, many feel that this is too late to begin effective language learning
- while the economy is growing, inequality and poverty are still key concerns, and the cost of English language training and a lack of access to government-funded programmes continue to be the biggest barriers to learning



# Conclusion

Ecuador has had a tumultuous history marked by periods of political, economic and social upheaval. It has been a democratic state since 1979 and became a major oil exporter in the 1970s. In 2000, it adopted the US dollar as the national currency in an effort to stabilise the economy. New measures to diversify the economy away from oil and promote national industries are creating a new and welcome sense of national pride, replacing the previous regional and local affiliations. Priority areas for investment have been identified, including tourism and other service sectors. As these new industries grow and internationalise and the informal sector gradually transitions to formality, English will become increasingly important for the growth of the country.

English language learning is supported by strong and positive public sentiment towards English, which is seen as the key to increasing employability. This feeling is particularly strong among the indigenous population, which often reports facing greater barriers to employment. There is significant inequality in access to English language training, although this should improve with the provision of mandatory English lessons in public secondary schools. This inequity stems from high income inequality and poverty rates, and while these indicators are improving, socio-economic status continues to dictate access to quality private education as well as supplementary private tuition and English language training. As public schools tend to have fewer resources and qualified teachers and handle large class sizes, the quality of English language training in these schools is often much lower. There are also regional inequalities in access to English language training: in more vulnerable, rural areas agriculture remains a major employer and access to technology is more limited, resulting in reduced exposure to English.

The government has put in place a new national English curriculum and associated measures as part of its overall goal of improving access to quality public education - a goal that is supported by the public. Education reforms have been based upon the idea that education is a means of fostering the equality, solidarity, multiculturalism and skills that will directly benefit the economy. The national English policy mandates proficiency targets and a new evaluation system and continuous professional development for teachers. It has also resulted in more opportunities for study abroad through student and teacher scholarships, and while these programmes are facing teething problems surrounding high entry requirements, restrictive conditions and low awareness, their success should increase as skills, demand and awareness grow. While education has been prioritised by the government, the sector has also been affected by budget cuts in response to the recent economic downturn, and economic policies, including high taxes on capital outflows, have hampered study abroad and international teacher recruitment. Overall, however, the current government has taken strong and positive steps towards improving access to quality education and English language programmes, and the effects should become more apparent as the reforms mature.