

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

May 2015



# Contents

<b>INTRODUCTION</b>	<b>4</b>
<b>METHODOLOGY</b>	<b>5</b>
<b>KEY FINDINGS</b>	<b>7</b>
<b>MACRO ANALYSIS</b>	<b>8</b>
Federal and state governance of education in Mexico	8
Education indicators	9
Federal government policy for English language learning	13
National English Programme in basic education	15
English teaching approach	18
The SEP teacher profile	19
The teaching profession in Mexico	20
Implementation and impact of the NEPBE	22
<b>ENGLISH LANGUAGE LEARNING ANALYSIS</b>	<b>23</b>
Public education English language penetration	23
Private education English language penetration	24
Higher education English language penetration	25
Commercial English language education penetration	26
Self-accessed English language penetration	27
<b>ENGLISH LEARNING MOTIVATIONS</b>	<b>28</b>
Occupation and English language learning	30
Level of education and English language learning	31
Household income and English language learning	32
Motivations for studying English	33
English proficiency	35
Barriers to studying English	39
View of learning English	41
Value of English learning	42

<b>EMPLOYER DEMAND FOR ENGLISH</b>	<b>43</b>
Language used in business communication	43
English proficiency	45
English training	46
The value placed on English by employers	46
<b>FACTORS SHAPING DEMAND FOR ENGLISH LEARNING IN MEXICO</b>	<b>49</b>
English for national and personal economic growth	49
Economic development and global competitiveness	49
Level of education and the need to speak English	50
Unequal societal development	51
Migration	52
Teachers of English	52
The influence of media and culture on attitudes towards English learning	53
Exposure to English and the learning environment	54
<b>OPPORTUNITIES IN MEXICO</b>	<b>55</b>
<b>IN CONCLUSION</b>	<b>56</b>

# Introduction

The challenges Mexico faces are numerous and nuanced. In the past few decades, the country has made great strides in economic development, education expansion and boosting literacy, but it is currently contending with a drop in GDP growth. To ensure future economic benefits, the Mexican government is focused on opening and liberalising industry sectors and in retaining close trade relations with the US and Latin American countries to sustain a trend of increased foreign direct investment. As a result, interest in creating an even more favourable business environment for continued global trade has become a priority, with a national English language policy perceived as creating a viable, international workforce that could attract multinational corporations. However, implementing such a plan within a decentralised education system in a country characterised by divisive income disparity and defined indigenous populations is a formidable task, with outcomes that, in the near-term, may not be easily gauged or measured.

# Methodology

## Phase 1

### Literature review

---

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

## Phase 2

### Desk research and secondary data collection

---

Working with local language analysts, we compiled extensive background information on the local education and policy environment during phase two. An audit of secondary data sources framed the structure and design of our later primary data collection phase.

## Phase 3

### Quantitative primary data collection

---

During phase three we collected primary data through two main channels:

- An online survey of 1,000 people from the general Mexican population sampling males and females aged from 16 to 35 years old.
- An online survey of 110 Mexican employers varying in size from 10 to over 1,000 employees with the sample was taken from managerial and executive level staff.

## Phase 4

### Qualitative primary data collection, in-depth stakeholder interviews

The final phase of our research and data collection involved a series of telephone and face-to-face stakeholder interviews carried out in Mexico City, Puebla and León.

#### Interviews

##### Government

- Director General, Subsecretaria de Educación Básica, Direccion General de Desarrollo Curricular, Secretaria de Educación Publica
- Director de Planeacion y Apoyo Tecnico de la Direccion General de Desarrollo Curricular de la Subsecretaria de Educacion Básica, Secretaria de Educación Publica
- Subdirectora, Secretaria de Educación Publica
- Field research secretary and coordinator, Secretaria de Educación Publica
- Federal Administration of Educational Services, Mexico City

##### Education professionals

- Director, English, British Council Mexico
- Exams Office, Rye School of English
- Deputy Manager, Leippo Language Centre
- Academic Coordinator, Emax Learning Institute
- Coordinadora de Instruccion, Berlitz de Mexico S.A. de D.V
- Kids & Teens Programs Manager, Berlitz de Mexico S.A. de D.V.
- Agents - Inovaeducation, Across the Pond, loveUK
- Marketing Manager, AMEDIRH Human Resource Association

##### Education institutions

- Director, Office of International Relations, Benemérita Universidad Autónoma de Puebla
- Study Abroad Coordinator, Office of International Relations, Benemérita Universidad Autónoma de Puebla
- Sria. De Investigación y Estudios de Posgrado, Facultad de Lenguas, Benemérita Universidad Autónoma de Puebla
- Director for Research and Graduate Programs of the Faculty of Modern Languages, Benemérita Universidad Autónoma de Puebla
- Coordinator de LEMO, LEI y LEF, Facultad de Lenguas, Benemérita Universidad Autónoma de Puebla
- Academic Coordinator, Language Administrator, Language Center, Universidad Panamericana, Mexico
- Programas Internacionales y Traducción, Global Affairs, Universidad Panamerica
- Professor, Universidad Autonoma, Metropolitana, Xochimilco

# Key findings

- Younger Mexicans today are attaining higher levels of education than previous generations. According to the OECD, in 2011 44% of 25 – 34 year olds had attained at least an upper secondary education, twice the proportion of 55 – 64 year olds (23%)
- The mission of the National English Programme in Basic Education is framed by the needs of ‘contemporary society...that demands citizens with the necessary competencies to face and incorporate into a globalised constantly changing world’
- The value of the linguistic capital gained by English competence in Mexico is estimated at around US\$27 billion each year via growth in the services sector
- Mexico devotes 93.3% of its education budget to staff compensation, the highest proportion among OECD countries, 13% of whom were apparently not actively employed in schools
- The National English Programme in Basic Education has to date been introduced in 18% of Mexican public schools reaching an estimated 6.7 million students
- To achieve its goals for teaching English across the country the Mexican government needs to recruit and train over 80,000 additional English teachers
- Mexico has a substantial English learning market with around 20% of the population accessing English tutoring via public or private means
- There is a correlation between occupation, level of education attained, household income and access to English language learning
- English is most widely studied during mandatory school education, undergraduate study and via private tutoring to improve employment prospects
- The greatest motivations for beginners to undertake English lessons are to improve their employment prospects (26%), to improve their quality of life (16%) and to travel abroad (16%)
- On average 58% participants in our primary research viewed English as a skill needed for greater employability, and 49% valued English as a pathway to a better job
- Thirty-three per cent of Mexican businesses participating in this study use English as the main language of internal business communication, while 47% use English as the main language of external business communication
- Fifty-one per cent of businesses surveyed offer English language training and development for existing or new staff, and of this group 50% offer in-house training, 30% via a private external company and 18% provide funding for tutoring
- Sixty-nine per cent of Mexican employers said they felt English was an essential skill when hiring new staff
- Mexican business leaders believe that English is the international language of communication, because it allows them to deal with foreign clients and customers and is a skill in demand due to the fast pace of globalisation

# Macro analysis

## Federal and state governance of education in Mexico

The Mexican government is a representative government, described as a federal republic or a federation. The basis of this government is the Mexican constitution which provides a governmental blueprint for the 31 United Mexican States and the Federal District. The constitution describes the responsibilities and powers assigned to the three branches of the federal government and how the federal government interacts with the state governments. Further, each of the 31 states is divided into municipalities.

The English language has been taught in Mexican public schools since the 1960s. The decentralisation of basic and teacher education began in May 1992 with the signing of the National Agreement for the Modernization of Basic Education. With this act the federal government transferred to the 31 states responsibility for more than 14 million students, 513,000 teachers, 115,000 administrative employees and 100,000 schools. The agreement that was signed by the Secretariat of Public Education (SEP), the National Teachers Union (SNTE), and the governors of the 31 states established the conditions for the transfer of responsibility of basic education including English teaching. To give legal form to the new structure of the Mexican education system, the Federal Congress reformed Article Three of the Constitution in 1992 and approved the General Law of Education (GLE) in 1993. The underlying goal found in these policies identifies the expectation that through decentralisation federalism will be strengthened and consequently raise the quality of, and equity in, education<sup>1</sup>.

The Mexican framework of decentralisation is simple in its construction. It is a model in which the central state retains the power to dictate general, nationwide norms for the overall system. This power covers the development of the national curriculum and the approval of regional curricula, the evaluation of the system, and the channelling of compensatory and extraordinary resources to the poorer states. The states assume responsibility for labour relations, school management and the administration of other reforms decided by the SEP.

A considerable number of motives for the decentralisation of education in Mexico have been cited and debated. It has been argued that increased efficiency would come from taking power away from the central bureaucratic structures of the SEP, resulting in decisions made at the local level that were based on reliable information and the precise political and logistical understanding of local conditions.

The Mexican model of decentralisation has been described as based on the cooperation between and coordination of the states and the federal government rather than a representation of sovereign states agreeing to establish a national system. This model was named the New Federalism.

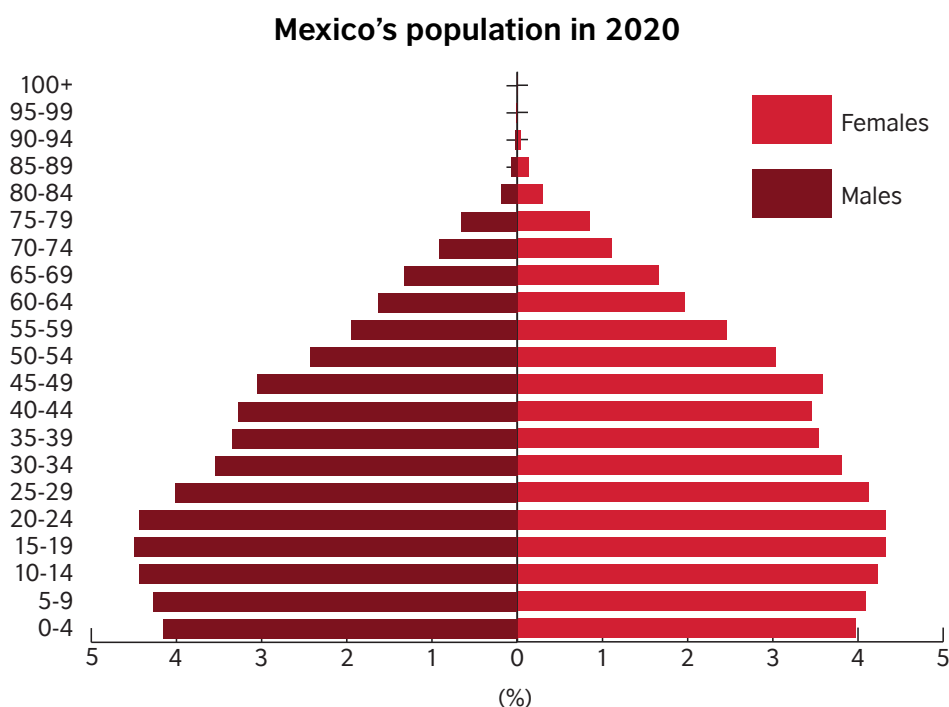
---

<sup>1</sup> Carlos Ornelas, 'The politics of the educational decentralization in Mexico', Autonomous Metropolitan University of Mexico



## Education indicators

Mexico has a population of around 122.7 million and is ranked as the eleventh most populous country globally. It has the highest population for a Spanish speaking nation and this is on a steady and positive growth path, forecast by the United Nations Population Division to reach 130 million by 2020, 144 million by 2030 and 152 million by 2040. Mexico has a huge youth bulge; currently around 46% of the current population is aged between 0 – 24 years old.



Source: The United Nations Populations division

It is estimated that in 2020 the largest demographic group will be aged between 15-19 years old. This growing number of young people represents a huge challenge for the Mexican government and is expected to put a significant strain the Mexican public education system.

In 2010, 6.2% of Mexico's GDP was devoted to expenditure on educational institutions, slightly below the OECD average (6.3%). The Mexican government has over the past ten years spent a consistent proportion of expenditure on each level of education, shown in the table below. The highest proportion of government spending is on primary level education.

### Expenditure on levels of education as % of government expenditure on education

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Pre-primary	9	10	12	10	10	11	11	12	10	10	10
Primary	40	39	39	40	39	39	38	37	36	36	36
Secondary	34	29	29	30	30	30	29	29	30	30	31
Tertiary	15	20	17	17	17	17	18	19	20	20	18

Source: UNESCO Institute for Statistics 2014

Gross enrolment in all levels of education has increased over the past ten years with pre-primary, primary and lower secondary levels of education having reached 100%. Higher levels of secondary schooling have not however reached this point and have considerably higher levels of attrition, just below 11% in lower secondary level in 2011.

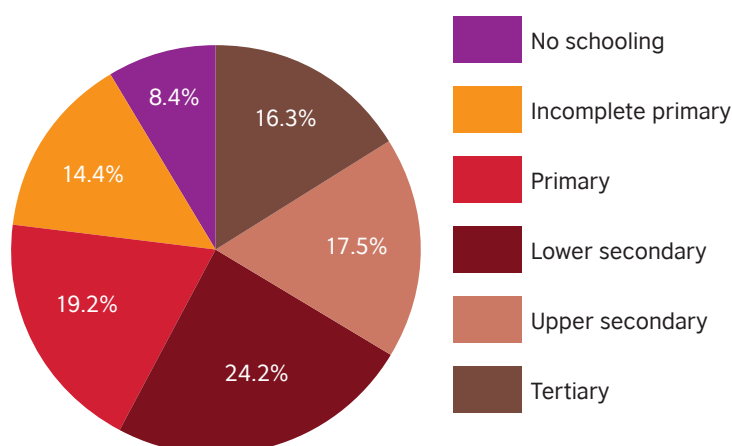
### Gross enrolment ratio, both sexes, all levels of education, as %

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Pre-primary	71	70	74	77	84	92	98	99	98	98	99	101
Primary	105	105	105	103	102	101	101	102	103	104	104	105
Lower secondary	96	98	102	102	102	104	106	109	107	107	107	109
Upper secondary	46	48	51	53	54	55	56	57	58	59	61	62
Tertiary	20	21	22	23	23	24	24	25	26	27	28	29

Source: UNESCO Institute for Statistics 2014

The chart below shows the percentage of the Mexican population 25 years and older, estimated at around 63.5 million in 2012, by level of educational attainment. These data show that of this older part of the Mexican population, 19% had only achieved up to primary level education, 24.2% up to lower secondary level, and 17.5% upper secondary and just 16.3% had attained tertiary level education.

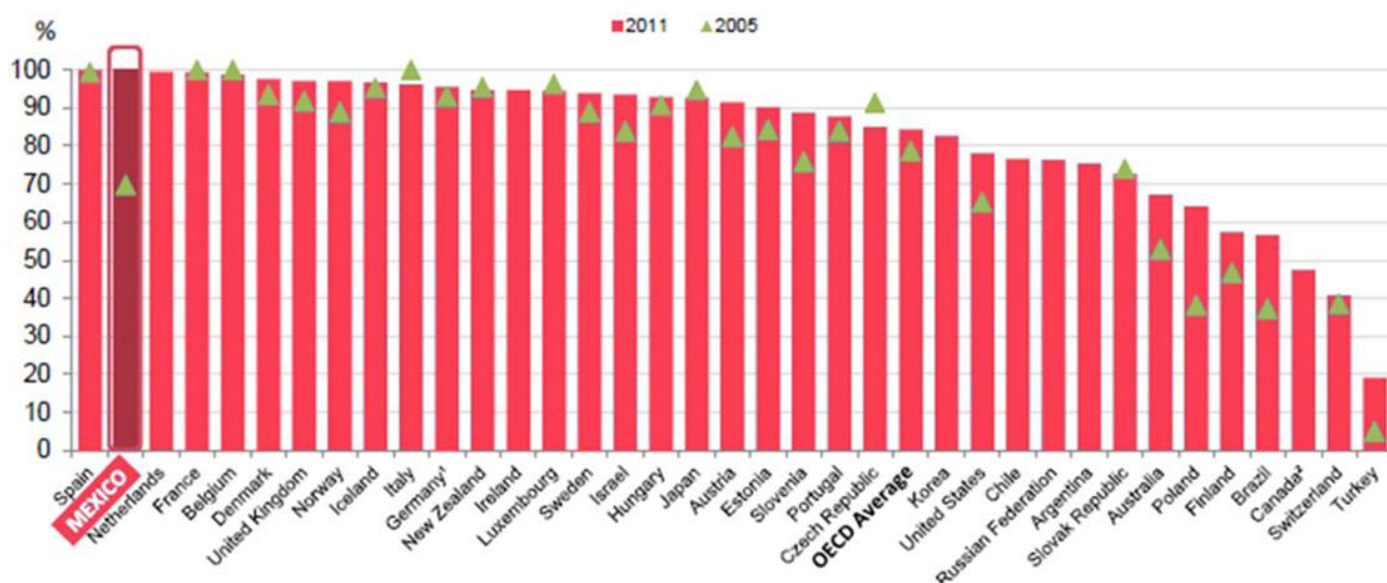
### Education attainment of the population aged 25 years and older, 2012



Source: UNESCO Institute for Statistics 2014

Younger Mexicans today are attaining higher levels of education than previous generations. According to the OECD in 2011, 44% of 25-34 year-olds had achieved at least an upper secondary qualification, almost twice the proportion of 55-64 year-olds with the same level of attainment (23%). A similar evolution can be seen at the tertiary level. In the same year only 12% of 55-64 year-olds had attained a tertiary education while 23% of 25-34 year-olds had done so. The proportion of 4-year-olds enrolled in education in Mexico has increased significantly as shown in the chart below. In 2005, 70% of 4-year-olds were enrolled in pre-primary education, whilst in 2011, an estimated 100% of four year-olds were enrolled.

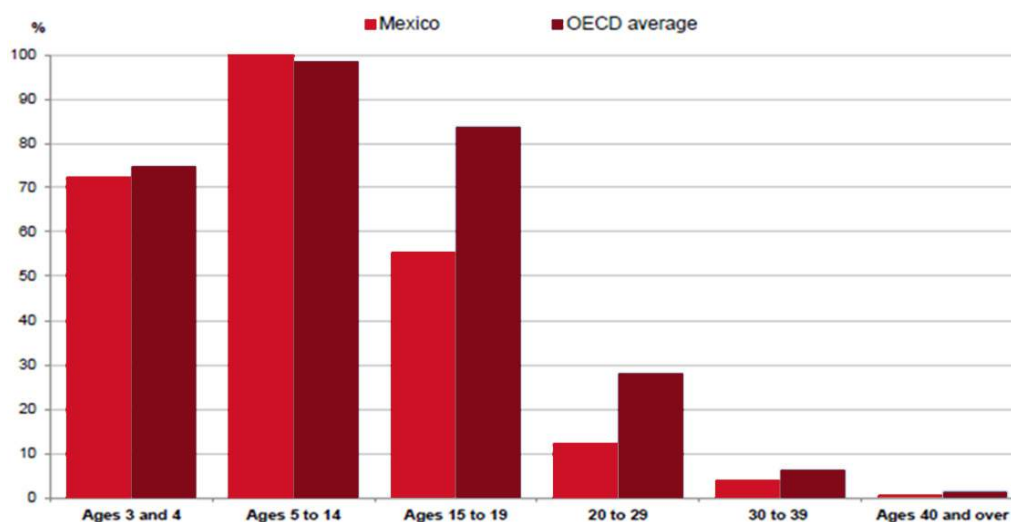
### Enrolment rates at age 4 in early childhood and primary education (2005 and 2011)



Source: OECD Education at a glance

Most Mexicans have attained a level below upper secondary education. The proportion of adults who have attained at least an upper secondary education is one of the smallest among the OECD countries. Mexico has the lowest enrolment rates among 15-19 year-olds (56%) among OECD countries, at the same time as it has the largest population of this age group in the country's history<sup>2</sup>.

### Enrolment rates, by age (2011)



Source: OECD Education at a glance [http://www.oecd.org/edu/Mexico\\_EAG2013%20Country%20Note.pdf](http://www.oecd.org/edu/Mexico_EAG2013%20Country%20Note.pdf)

It is estimated that within four years of leaving compulsory schooling, more than two-thirds of students have left the education system entirely. Some 64% of 16-year-olds are enrolled in upper secondary education, while only 37% of 18-year-olds are enrolled in education (20% in upper secondary school and 17% in tertiary education). Only 27% of 20-year-olds are enrolled in education (3% in upper secondary school and 24% in tertiary education).

<sup>2</sup> OECD, 'Mexico – Country Note – Education at a Glance 2013: OECD Indicators'

The OECD reports that in 2011, around 66.1% of 15-29 year-olds in Mexico were not in education and 24.7% of that age group were neither employed nor in education or training (NEET). Mexico has the third highest proportion of NEETs of this age group among all OECD countries. Within this population of young adults, the proportion of NEETs increases with age: 18.9% of 15-19 year-olds, 27.2% of 20-24 year-olds, and 29.5% of 25-29 year-olds are NEET. However, the proportion of NEETs among 15-29 year-olds shrinks with educational attainment: 27.6% of young adults with below upper secondary attainment, 18.9% of young adults with upper secondary education, and 16.8% of young adults with tertiary education are NEET. The proportion of NEETs in Mexico has remained stable for more than a decade (24.6% in 2000, 24.9% in 2005, and 24.7% in 2011), which the OECD claims indicates that a structural flaw in the Mexican education system is at the root of the problem, rather than cyclical economic factors.

## Federal government policy for English language learning

The study of any government policy and its efficacy is a complex and challenging process, in Mexico not least due to the complicated relationship between the federal and state governments. The details of policy are often contained in the actions of individuals and institutions involved in its development and may not be clearly defined in accessible documentation. When a policy is clearly stated it is difficult to measure its exact impact as this may fall beyond the intended consequence of the original policy. The relationship between statements of policy and the actions of individuals is also complex. The development of a policy by an authority and the recommendation of a particular course of action do not provide certainty that this will stimulate the population to take this course unless they perceive it as beneficial on a personal level<sup>3</sup>. This is certainly true of the Mexican federal government's policy for language learning.

The regulating principles established by article three of the Mexican constitution, as well as the educational transformation encouraged by the Plan Nacional de Desarrollo (National Development Plan) 2007-2012, and the objectives outlined in Programma Sectorial de Educación (Sectoral Education Programme) 2007-2012 (PROSEDU) provide the national guidelines regarding public education policies in Mexico. The main objective of PROSEDU as established by the SEP is:

“To enhance the quality of education so that students may improve their level of educational attainment, rely on the necessary means to have access to an improved well being and thus contribute to national development<sup>4</sup>”

The 2007– 2012 National Development Plan articulated six general objectives for regulating education actions and priorities:

1. Increase the quality of education so that students improve their level of educational achievement, have a means of acquiring better welfare and make a greater contribution to national development.
2. Widen educational opportunities in order to diminish inequalities among social groups, close gaps and foster equity.
3. Foster the development and use of information technology in the educational system to support student learning, increase life competences and favour a better entry into learned society.
4. Provide a comprehensive education by balancing the formation of citizenship values, the development of competence and the acquisition of knowledge, through regular classroom activities, teaching practices and an institutional environment that supports democratic and intercultural coexistence.
5. Offer quality in educational services to develop individuals with a higher awareness of their social responsibilities, who participate in the labour market in a productive and competitive way.
6. Foster school and institutional management, which makes school participation more integral to the decision-making process, creates co-responsibility among the different social and educational players and promotes the security of students and teachers, as well as transparency and accountability.

The Sub-Secretariat of Basic Education acknowledges the necessity to incorporate English as a subject to the curricula of pre-school and primary education, and make suitable adjustments to secondary school English curricula, with the purpose of facilitating the instruction of this foreign language in all three levels of basic education. This is designed to ensure that by the time students complete their secondary education, they have developed ‘the pluri-lingual and pluri-cultural competence necessary to successfully handle the communicative challenges of the globalized world, and respect their own culture as well as that of others’.

In order to deliver on this ambition, in 2009 the Secretariat of Public Education launched the Programma Nacional de Inglés en Educación Básica (PNIEB), or National English Programme in Basic Education (NEPBE). The initiative was aimed at teaching English to Mexican students starting at a younger age. Its goal was to begin teaching English in pre-primary school and to continue instruction in English until the end of secondary school education (from the ages of 5 to 15).

<sup>3</sup> Pauline Moore Hanna, ‘Mexican national and international policy on second languages (principally English)’, *Lengua y voz*, Año 3, número 1, Agosto 2012 – Febrero 2013, p. 3 - 18

<sup>4</sup> <http://basica.sep.gob.mx/>

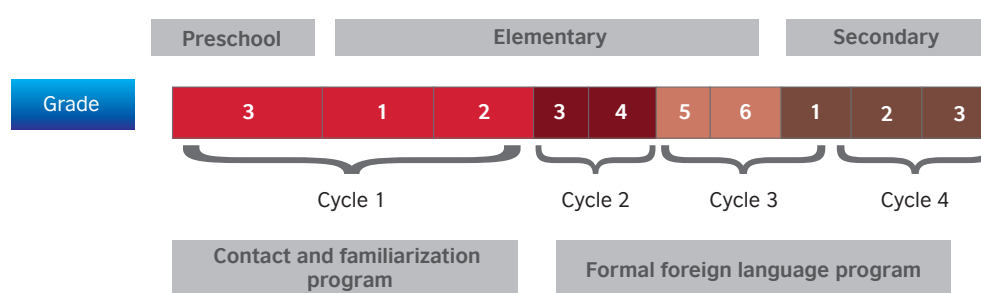
The mission as stated by the SEP of the National English Programme in Basic Education is framed by the needs of 'contemporary society that is predominantly governed by information and communication technologies, that demands citizens with the necessary competencies to face and incorporate into a globalized constantly-changing world. Basic education has the responsibility of providing students with the opportunity to develop these competencies. Thus, in order to accomplish the aforementioned, students need to acquire fundamental skills, such as the use and command of these technologies and the knowledge of at least one foreign language'.

Previous English language learning programmes were designed and carried out by a number of federal entities across Mexico. These English programmes for elementary education were acknowledged by the SEP in the design of the NEPBE. However, it has been suggested that the fact that these were not created at a national level caused their operation to be extremely heterogeneous in aspects such as coverage, achievement levels, types of content addressed as well as teaching hours. In some cases, this hindered the continuity of English learning in the subsequent levels of education. The SEP argued that it was this dispersed and uncoordinated practice that generated the necessity to design study programmes for the teaching of English based on current regulations (for secondary preschool and for all grades of elementary education) and to create conditions so that these can operate with equity and quality in all basic schools in Mexico.

## National English programme in basic education

The National English Programme in Basic Education is divided into two stages that span four Cycles; the first stage focuses on Contact and Familiarisation and takes place in Cycle 1. The main purpose of the first phase is to sensitise students to a foreign language by means of getting them involved in social practices and specific activities with the language that are carefully planned and form the basis for later learning. The second stage focuses on the formative teaching of the foreign language, and takes place in Cycles 2, 3 and 4. Here the students obtain the required competencies to use English in an effective way by participating in specific activities with the language, defined by and based on the social practices of the language in different social learning environments.

### The NEPBE two-stage process



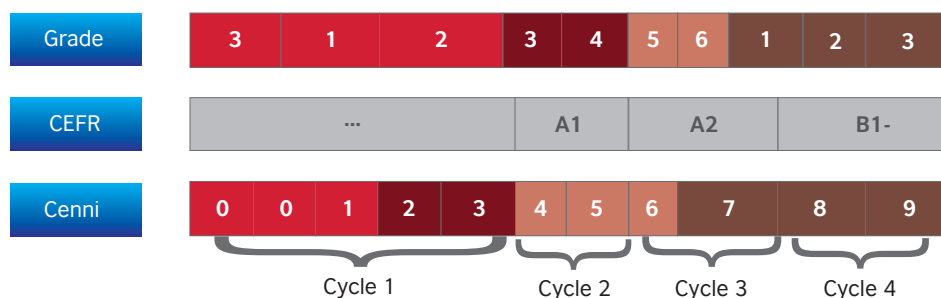
The time frames allocated to each cycle were determined by the Common European Framework of Reference for languages. The diagram below outlines the six levels of the Common European Framework that were the basis for the development of the NEPBE:

### Common European Framework of Reference for Languages

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

Based on the Common European Framework, the SEP developed a series of national standards for foreign languages called the Certificado Nacional de Nivel de Inglés (CENNI), with the purpose of showing the equivalences between both groups of standards, as shown in Figure 2. The CENNI standards were taken into account in establishing the minimum levels that students should attain after having completed each NEPBE cycle.

### Expected achievement levels by cycle and grade

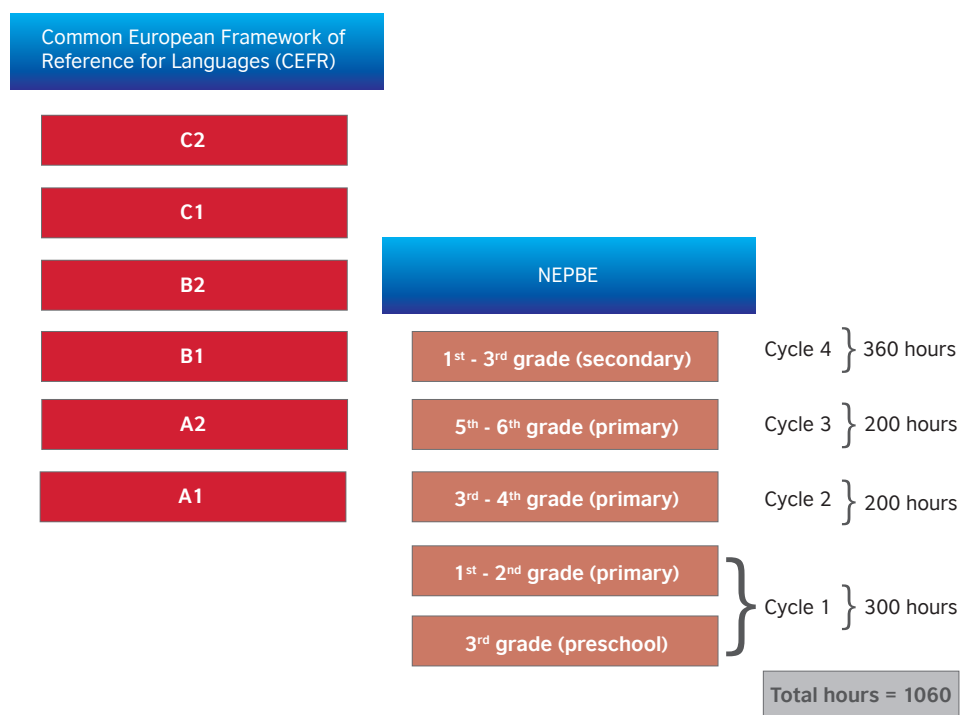


The NEPBE includes a total of 1,060 hours teaching which corresponds to the sum of hours allocated to this subject in each school grade (200 days, 40 weeks). As shown in Figure 3, they are distributed throughout the cycles in such a way that these, besides being cumulative, are necessary to attain the profiles corresponding to the achievement levels for each one.

Completing 300 hours' work is required within Cycle 1 to attain the A1 level of achievement corresponding to Cycle 2. Likewise, the total 500 hours that comprise Cycles 1 and 2 are required to reach level A2 of Cycle 3 (200 hours). Whereas the 700 hours based on the sum of Cycles 1, 2, and 3 plus the 360 hours of Cycle 4 are necessary to achieve level B1 (1,060 hours).



## Alignment with international standards



There is an expectation that the students will attain at least CENNI level 1 at the end of Cycle 1, level 5 towards the end of Cycle 2, level 7 at the end of Cycle 3, and levels 8/9 when they conclude Cycle 4, as shown in the chart. The chart shows how NEPBE cycles compare with the levels of proficiency demanded by the international standards for the achievement of English competency. This competency, however, not only depends on the amount of class time allocated to the additional language, but also to other factors such as students' competency in their mother tongue, teachers' level of English proficiency, and the accessibility and availability of printed and multimedia resources (audios, videos, compact discs, etc.) in this language.

## English teaching approach

In the outline of the approach for language teaching adopted by the SEP, it is acknowledged that ‘spoken practices used in dialogue vary and are established according to social and communicative conventions of the culture where the exchanges take place’. The programmatic contents of the NEPBE are described as involving three different types of learning:

- “Learning to do” with the language. This corresponds to the communicative actions carried out in concrete interactive situations, which besides the production and interpretation of oral and written texts are necessary to accomplish the communicative aims associated with participating in specific activities with the language.
- “Learning to know” about the language. This type of content involves a series of aspects, concepts, and topics for reflection on features, characteristics, and elements of the language, with the goal of helping students “raise awareness about their knowledge, know aspects of the language they had not reflected on before, and develop greater confidence and versatility to use the language. The purpose of learning more about grammar, increasing vocabulary, getting acquainted with writing conventions is to improve the students’ skills for reading, writing, speaking, and listening”.
- “Learning to be” through the language. This type of content refers to aspects related to the role of intercultural education in general and to language diversity in particular as well as the multiple functions they carry out and the attitudes and values underlying oral and written interaction. Their goal, on one hand, is to increase the opportunities for students to share their knowledge and experiences with a foreign language through socialising. On the other hand, it is to appreciate the importance of fostering a harmonious, effective, tolerant, and inclusive atmosphere of communication<sup>5</sup>.

Through this teaching approach, the SEP states the aim of providing an education that preserves the functions and uses of language in social life. They highlight that contact with social practices of the language and the specific activities with the language derived from the former should be included from the early years of basic education.

In order to achieve the NEPBE’s goals successfully, they state that it is necessary for teachers be competent in the following areas:

- Language mastery. In the process of teaching a foreign language, the teacher is the most important model for spoken and written language, and sometimes the only model available. Therefore, the teacher must be a competent and proficient language user as well as a critical, well-informed agent knowledgeable about the aspects related to linguistic analysis.
- Knowledge related to the students’ development at different ages. The teacher must have solid knowledge about children and adolescent development in order to understand their needs, interests, and abilities, as well as the difficulties students face in the foreign language learning process.
- Knowledge related to foreign language teaching. Teachers must understand the essence of the subject matter (social practices and activities in and with the English language), such as the ‘learning to do with’, ‘to know about’, and ‘to be through the language’ that derive from the process, so that they can adopt appropriate teaching strategies and practices.

---

<sup>5</sup> <http://basica.sep.gob.mx/>

## The SEP teacher profile

SEP has devised two profiles for potential English teachers, each of which specifies a proficiency level that teachers must obtain in order to teach English in public schools. These levels are based on the Common European Framework as outlined above. They are described as Basic and Ideal. At the Basic level the teacher has to have attained one level higher than that of the student. For example to teach a student in Cycle 1 to attain level A1, the teacher must have attained level A1, to teach in Cycle 2 for the student to attain level A2, the teacher must have attained level A2, and so on.

### Basic level teacher profile

	Preschool		Primary						Secondary			
			Cycle 1		Cycle 2	Cycle 3	Cycle 4					
Grade	1	2	3	1	2	3	4	5	6	1	2	3
CEFR			A1		A2	B1	B2					
Cambridge			---		KET	PET	FCE					
TOEFL (iBT)			---		---	57 - 86	87 - 109					

At the Ideal level, the teacher must have attained two levels above that in which they are instructing the students. For example to teach a student in Cycle 1 to attain level A1, the teacher should have attained level A2. There is no available data that shows the number of teachers that fit either the Basic or Ideal profiles.

### Ideal level teacher profile

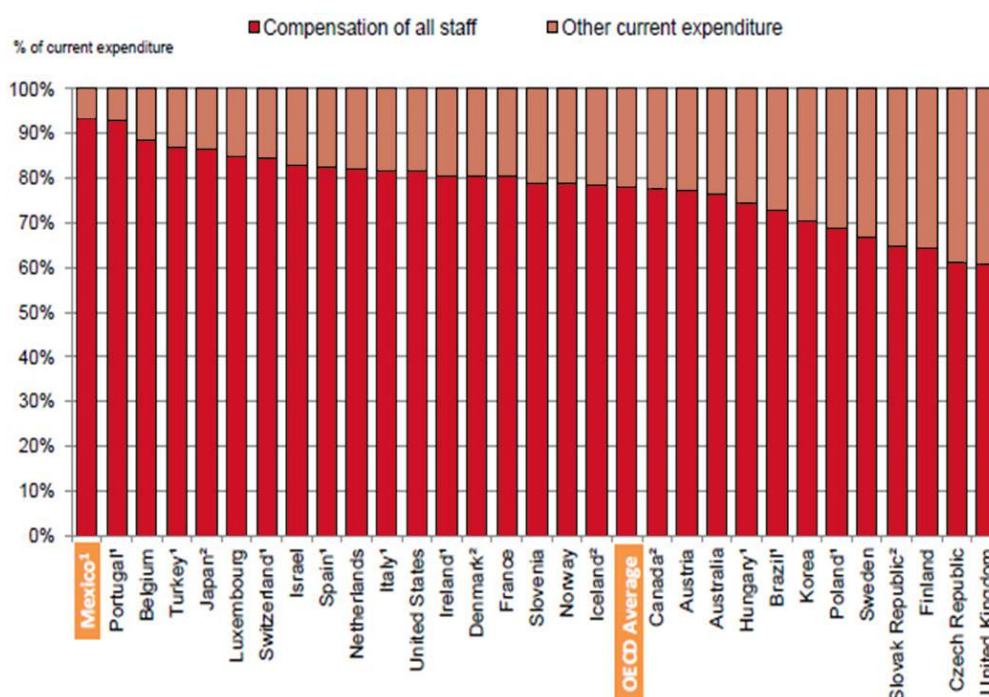
	Preschool		Primary						Secondary			
			Cycle 1		Cycle 2	Cycle 3	Cycle 4					
Grade	1	2	3	1	2	3	4	5	6	1	2	3
CEFR			A2		B1	B2	C1					
Cambridge			KET		PET	FCE	CAE					
TOEFL (iBT)			---		57 - 86	87 - 109	110 - 120					

## The teaching profession in Mexico

As detailed within the education indicators section above, the Mexican government's spending on education is significant and has been on a sharp upward trend since the 1980s, reaching around 7% of GDP in 2012. During this time teachers' salaries have also been steadily rising. The problem, therefore, does not appear to be related to funding, but to funding allocation.

According to the OECD, Mexico devotes 83.1% of its education budget to teachers' salaries and 93.3% to compensation of staff all together – the highest proportions among OECD countries. The OECD averages are 62% and 78.2%, respectively. Some 87.2% of spending on primary education is allocated to teachers' salaries, the highest proportion among OECD countries, while 78.1% of spending on secondary education is devoted to teachers' salaries. By comparison, the OECD average proportions allocated to teachers' salaries are 61.8% at the primary level and 62.0% at the secondary level<sup>6</sup> as shown in the chart below.

### Distribution and current expenditure by educational institutions for primary, secondary and post-secondary non-tertiary education; 2010



Source: OECD

In 2013 the Mexican Congress passed a major education reform bill, a series of secondary laws known as the Ley del Servicio Profesional Docente (LSPD). It was claimed that this measure was implemented based on the president's justification that it would improve the quality of Mexican education.<sup>7</sup> Mexico has a number of very strong teachers' unions, the Mexican National Educational Workers Union (el SNTE) and the Coordinadora Nacional de Trabajadores de la Educación (CNTE) among them that participated in the December 2013 protests against these government reforms.

<sup>6</sup> OECD, 'Mexico – Country Note – Education at a Glance 2013: OECD Indicators'

<sup>7</sup> Bertelsmann Stiftung, 'Sustainable Governance Indicators, 2014, Mexico Report'

The central aim of the LSPD is to mandate teachers, principals, counsellors, and staff to submit to mandatory assessments designed by the National Institute for Educational Evaluation (INEE). Teachers will have up to three opportunities to pass the evaluations during a period of two years. If they don't, they can opt for voluntary retirement, leave their jobs or be reassigned to an administrative position<sup>8</sup>.

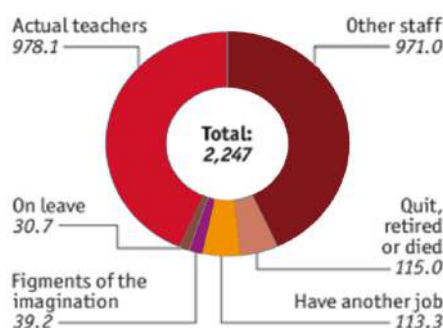
There were conflicting reports about the attitude of the CNTE to this: some claimed the union was totally opposed to the new system of evaluation, whilst others claimed they believed periodic evaluations should be carried out independently from the government, which would prevent local and regional differences in the country's schools being disregarded. In an alternative policy statement titled 'Towards the Education We Mexicans Need' issued by the CNTE in May 2013, they shared their vision for Mexican education reforms and an alternative method of teacher evaluation. The statement issued said:

'We propose a different form of evaluation, from the bottom up. A horizontal evaluation that originates from the schools and communities, developed as a dialogic exercise in each area, region, and state. An assessment that, while describing the problems, analyses the factors that cause them as well as potential remedies, and documents the successful experiences of teachers and schools in improving education. From these evaluation processes that engage students, teachers, schools, communities and authorities to define and offer solutions to local and regional problems, it is possible to build national and educational policies from below with broad support.'<sup>9</sup>

The teachers' policy proposal was not adopted by the government and in September 2013 thousands of protesting teachers took to the streets, led by the CNTE. One of the provisions of the reform is that the national statistics institute identify how many teachers are actually employed by the Mexican state.

In early 2014 the first ever census of schools in Mexico was carried out and showed that 13% of all those registered as working in Mexican schools were not actively doing so. The report, based on statistics from INEGI and the Ministry of Education, showed that these individuals were classified as on leave, untraceable, as having another job or having quit, retired or died. The sum total of these individuals is just over 298,000 of the 2.2 million registered employees according to the statistics produced.

### Employees of Mexican schools, '000, 2014



Sources: INEGI; Ministry of Education

Emilio Chauyffet, the Education Minister, says the government will now comb through the data to see whom among the missing it can stop paying. This has been reported to be a very difficult task because of the challenges of gathering exact data from schools in each state in Mexico<sup>10</sup>.

<sup>8</sup> Medina, Goodman, 'Mexican Education Reform from Below', *Boston Review*, September 2013

<sup>9</sup> Sección 9 CNTE, 'Documento entregado en Gobernación', 2 mayo 2013

<sup>10</sup> Economist, 'Education in Mexico: Phantom teachers', April 2014

## Implementation and impact of the NEPBE

In 2009 National English Programme in Basic Education was released as a pilot programme by the SEP. The first federal entities that took part in integrating this programme were: Aguascalientes, Coahuila, Durango, Nuevo León, Sinaloa, Sonora, and Tamaulipas. The programme has since expanded throughout the country and interest in exploring the programme's progress has generated a number of research projects. In 2012, in Ramírez, Pamplón, and Cota a study which included 11 states, found that the areas in which improvement was necessary for the proper implementation of the NEPBE involved the curriculum, the teachers (characteristics, current labour situation, and profile), the teaching and evaluation practices, and the resources and materials. Research that has been conducted brings to light the complexity of expanding the NEPBE throughout the country<sup>11</sup>.

The implementation of the NEPBE has been shaped by the current educational circumstances in each state, determined by the National Ministry of Public Education, and the budget assigned (by the government) for the project. It has been claimed that lack of consistency between the expectations of the implementation and the financial conditions in each state has impacted the speed of the programme's national roll out.

The data below was sourced from the Secretariat of Public Education showing the number of schools and students participating in the programme. Overall only 18% of schools are currently participating in the programme; 15% of preschools, 17% of primary schools and 45% of secondary schools. These data show of the 19.3 million school students in Mexico 35% are participating in the programme, 27% at preschool level, 27% at primary school level and 61% at secondary school level. In real terms 6.7 million Mexican students are participating in the National English Programme in Basic Education.

		TOTAL NUMBER OF SCHOOLS	SCHOOLS PARTICIPATING IN THE PROGRAM	% OF SCHOOLS PARTICIPATING IN THE PROGRAM
<b>Schools</b>	Preschool	46,181	6,797	<b>15%</b>
	Primary	77,100	12,848	<b>17%</b>
	Secondary	11,539	5,198	<b>45%</b>
	<b>Total</b>	<b>134,820</b>	<b>24,843</b>	<b>18%</b>

		TOTAL NUMBER OF STUDENTS	STUDENTS PARTICIPATING IN THE PROGRAM	% OF STUDENTS PARTICIPATING IN THE PROGRAM
<b>Students</b>	Preschool	1,694,620	454,708	<b>27%</b>
	Primary	13,216,790	3,581,489	<b>27%</b>
	Secondary	4,461,845	2,705,250	<b>61%</b>
	<b>Total</b>	<b>19,373,255</b>	<b>6,741,447</b>	<b>35%</b>

Source: The SEP, April 2014

Commentary that surrounds the successful implementation of national English language education suggests that curriculum circumstances, teacher profiles, students' characteristics, government spending and community support are all important to ensure positive outcomes for the programme. However if the NEPBE is eventually going to achieve full capacity and reach the 19.3 million students in Mexico, it is estimated that over 80,000 additional English teachers will need to be recruited and trained. This huge task is especially daunting due to the serious lack of college graduates with strong English skills that are eager to join the teaching profession.

<sup>11</sup> Valladares, Castro, 'The Challenge of Teaching English in Public Schools: Beyond Academic Factors', MEXTESOL JOURNAL, Vol. 37, No. 3, 2013

# English language learning analysis



The British Council estimates that the total size of the English language learning market in Mexico is around 23.9 million people, roughly 21% of the population. This figure includes students learning English via all possible channels: public education, at primary, secondary and tertiary levels and private education institutions. It also includes individuals and organisations learning English privately or via self-access learning.

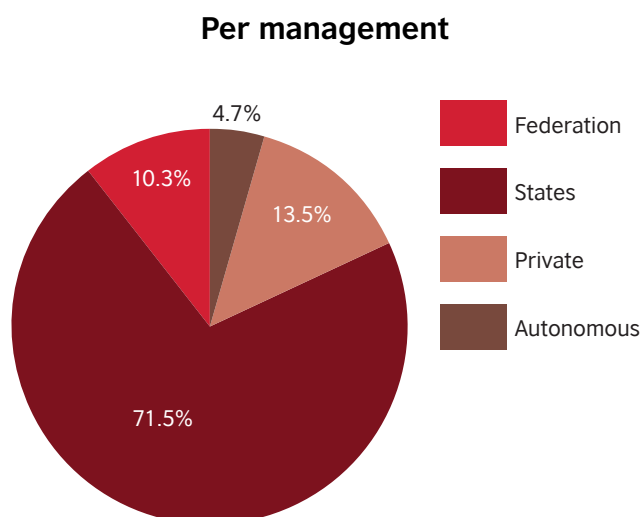
Source: British Council, Education Intelligence, Latin America Databank 2014

## Public education English language penetration

Data from the UNESCO Institute of Statistics suggested that in 2012 the gross enrolment ratios (GER) in each level of education in Mexico were as follows: pre-primary, 101%, primary, 105%, lower secondary, 109 %, upper secondary, 62 % (GER can exceed 100% due to the inclusion of over-aged or under-aged students/pupils because of early or late entrants, and grade repetition. In this case, a rigorous interpretation needs additional information to assess repetition of these potential factors). Statistics from the SEP suggest that 27% of pre-primary and 27% of primary school students have participated in the programme. Since gross enrolment in pre-primary and primary education is estimated to be nearing 100%, which would suggest that 27% of the total Mexican population of this age group have participated in the NEPBE programme.

Gross enrolment in lower secondary education is considerably higher (109%) than upper secondary (62%), with UNESCO data averaging 86% overall enrolment in secondary education. Based on this figure, the percentage of the Mexican population of secondary school age children participating in the NEPBE is estimated to be around 52%. Both of these figures are based on the SEP estimates of the total Mexican school populations at each level.

Data from the SEP in relation to the management of educational services shows that 71.5% of students attend schools managed by state governments. The data suggest this high percentage is due to the federalisation of basic education and teachers' colleges outlined in the opening section of this report that started in 1992. Services managed by the federal government constitute 10.3%, with a reported downward trend resulting from its programmed transfer to the states. Autonomous institutions, mainly universities, manage 4.7% of schools, mainly in upper-secondary and tertiary education. Therefore, only 13.5% of students attend private schools<sup>12</sup>.



Source: The SEP, 2010

## Private education English language penetration

Mexico school census data show that between 1985 and 2000 the per capita number of both private and public high schools almost doubled and by 2004 the number of students enrolled in private high schools was almost nine times the amount recorded in 1970. The UNESCO Institute of Statistics indicates that enrolment in private primary education in Mexico was 8.26% (% of total primary) in 2011. Its highest value over the past 40 years was 8.28% in 2009, while its lowest value was 4.78% in 1985. Enrolment in private secondary education was 13.35% (% of total secondary) in 2011. Its highest value over the past 12 years was 16.35% in 2001, while its lowest value was 13.35% in 2011.

Data from the Mexican National Consumption and Expenditure Survey (Encuesta Nacional de Ingresos y Gastos de los Hogares or ENIGH) for 2002 on the direct costs of studying (books and other materials, exams, boarding, etc.) show that the average cost of attending a public high school amounts to around 15% of median yearly household income, whereas the average cost of attending a private high school amounts to around 23%<sup>13</sup>. It is widely felt that private schooling in Mexico is a luxury that can be only accessed by higher income families.

Parents who have the resources in increasing numbers are placing their children in private schools. There are two types of private schools with English-language curricula: the bilingual school, where children begin to learn English at three years old, at first full-time and then in primary and secondary school reduced to two or three hours per day; and the bicultural school, where children spend 50% of their time learning English. There has also been a growth in international schools in Mexico with reports showing there are now over 100 schools with 80% of demand coming from wealthy local parents. This shows a significant change from a number of years ago when these schools were dominated by expatriate students. It is estimated that approximately 18.5% of high school students attend some type of private school, although statistics on the students per school type are not released<sup>14</sup>.

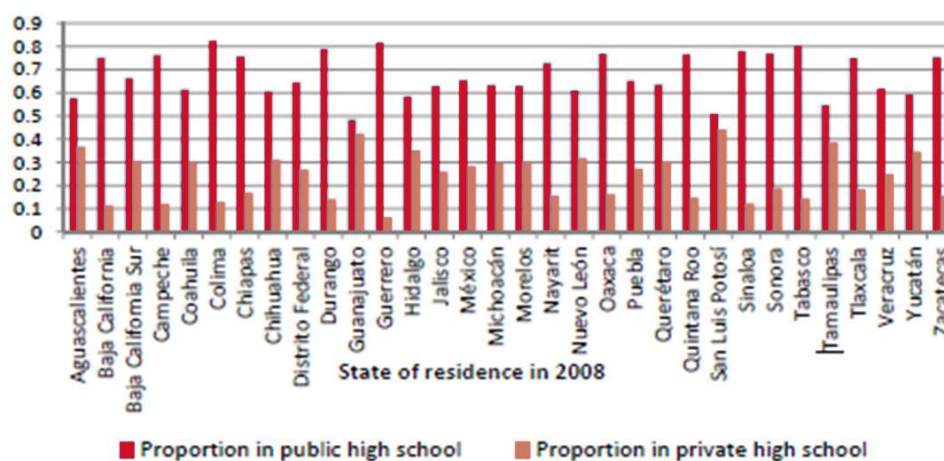
<sup>12</sup> [http://www.sep.gob.mx/en/sep\\_en/Basic\\_Education2](http://www.sep.gob.mx/en/sep_en/Basic_Education2)

<sup>13</sup> Institute for Fiscal Studies, 'The returns to private education: evidence from Mexico', IFS working paper W12/08

<sup>14</sup> <http://www.ef.edu/epi/archive/v2/south-america/mexico/>



The graph below is from a study entitled 'The Returns to Private Education: Evidence from Mexico', that looks at the growth of private education in Mexico. The graph shows the proportion of individuals from the research sample that attended a public or private high school by state. Private school attendance was shown to be higher in Aguascalientes, Guanajuato, Hidalgo, San Luis Potosi, Tamaulipas and Yucatan.



## Higher education English language penetration

Mexico has a long tradition and history of higher education. The country claims to have the first university in the Americas, namely the Royal and Pontifical University of New Spain, founded in 1551 and closed in the 1860s at which time it was said to have had three faculty members and less than twenty students, all studying theology<sup>15</sup>. The large numbers of Mexican higher education institutions, both public and private, are becoming increasingly internationalised and are beginning to develop strategies for internationalisation. Internationalisation of Mexican universities has been growing since the 1990s, however it has been noted that much international activity has been reactive with little integration with institutions' policy. It has been commented that internationalisation is at such a level of development in Mexico that it constitutes little more than the development of faculty and students' English skills:

'The prescription [the Rector of a prestigious public Mexican university] offered for Mexican higher education was straightforward: his university would have to recruit more faculty members with PhDs from American universities, offer more courses taught in English, and produce more English publications.'<sup>16</sup>

English language skills are increasingly seen as important to facilitate internationalisation of universities in areas of student and staff mobility, research collaboration and partnerships and international staff and student recruitment. Staff and students having insufficient foreign language skills are seen as a real threat to comprehensive internationalisation. English has become the predominant language of scientific publication globally and it was felt by university administrators that we interviewed that failing to attain the necessary level of English often prevented students from reaching their academic potential.

Many Mexican universities do not have an institutional English programme nor do they centralise the process of assessing students' English language levels. Many institutions charge an additional fee for students to gain English qualifications, however it is now common practice that students must attain a minimum of around 450 points on the institutional Test of English as a Foreign Language (TOEFL) or the equivalent on other internationally recognised English tests if they are to be eligible for graduation. Policies of this kind reflect the pressures that Mexican universities are facing. They are now being required to provide measurable evidence of their educational quality if they are to accredit their educational programmes, and therefore, to compete for the allocation of funding. The underlying assumption of this policy seems to be that by setting this target for students, they will be encouraged or forced to improve their proficiency level in English<sup>17</sup>.

<sup>15</sup> OECD, *Reviews of Tertiary Education, Mexico, 2008*

<sup>16</sup> Berry and Taylor, 'Internationalisation in higher education in Latin America: policies and practice in Colombia and Mexico', 2013

<sup>17</sup> Vazquez, Guzman, Roux, 'Can ELT in Higher Education be Successful? The Current Status of ELT in Mexico', *The Electronic Journal for English as a Second Language*, Volume 17, Number 1, May 2013

Students must also attain a certain level of English before they can undertake study abroad programmes, a level which is measured by and large through their TOEFL score. At a national policy level the National Council for Science and Technology (CONACyT) funds short-term stays for Mexican researchers and students at institutions overseas, as well as scholarships for master's degrees, PhDs and post-doctoral positions abroad.

## Commercial English language education penetration

There are a number of commercial English language providers across Mexico, with upwards of 70 registered schools across the Mexican states, with a number of companies having multiple branches. Berlitz, Harmon Hall, International and The Anglo are examples of schools that have a nationwide presence and strong brand recognition due to considerable marketing efforts. They market themselves as being able to offer tailored learning solutions to meet the needs of individual learners, but are perceived as expensive. Classes cost from 80 to 150 pesos for one hour. During an interview with representatives from one of Mexico's largest commercial language providers they reported that their largest customer group was 25 – 35 year olds that wanted to improve their English for employment and many had been sent to English classes by their employer. They also had a large number of young learners who were supplementing their school-based English learning.

Across Mexico, English learners take TOEFL, IELTS and Education First tests to evaluate their levels of English. Although they provide a reference point for levels of English attainment in Mexico, analyses of these scores must be presented with the caveat that they are not representative of the wider Mexican population, nor do they reflect the true purpose of the tests. Test-takers are self-selecting and fee paying, and come from a wide and varied background of English learning that will impact their ability and ultimately their final test score.

### TOEFL

The TOEFL test was perceived as the most popular English testing service by stakeholders we spoke to in Mexico. A large number of Mexican students take TOEFL tests to be able to study abroad and graduate from university. The standardised TOEFL test gives reading, listening, speaking and writing scores between 0 – 30 to give a combined score of 0 – 120. Below are the aggregate results for Mexico from December 2013.

#### TOEFL January - December 2013

Reading	Listening	Speaking	Writing	Total
21	22	22	21	86

According to TOEFL scoring scales in Mexico, reading levels are scored as intermediate, listening intermediate, speaking fair, and writing fair. When comparing the total TOEFL scores for Mexico with the equivalent Common European Framework level, 86 is equivalent to between B2 and C1 level.

### IELTS

TOEFL's largest competitor globally as well as increasingly in Mexico is the standardised test provider IELTS. IELTS publish data for both Academic and General training and all scores for Mexico are within band 6 which is described as a 'competent user' that has generally effective command of the language despite some inaccuracies and misunderstandings. They can use and understand fairly complex language, particularly in familiar situations. When comparing IELTS to the Common European Framework level, 6.5 is equivalent to C1 level.

#### IELTS scores - 2013

ACADEMIC				
Reading	Listening	Speaking	Writing	Total
6.8	6.6	6.5	6	6.5
GENERAL TRAINING				
Reading	Listening	Speaking	Writing	Total
6.4	6.4	6.6	6	6.4

## Comparative English language levels

In order to better understand how these standards relate to each other and with the Common European Framework, we must look more closely at the relationship between the measures. As mentioned, IELTS and TOEFL candidates in Mexico achieve a B2 or C1 level of English but it is worth mentioning that those taking the IELTS and TOEFL are part of a self-selecting group that have previously undergone English training, thus are not representative of the whole population.

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

## Self-accessed English language penetration

According to La Asociación Mexicana de Internet (AMIPCI), or the Mexican Internet Association, Internet users in Mexico rose from 34.9 million in 2010 to 51.2 million in December 2013. 57% of Internet users are aged between 6–24 years old, 18% 25–34, 13% 35–44 and 12% more than 55 years old<sup>18</sup>. According to AMIPCI, 81% of surveyed users said their main recreational use of the Internet was use of social networks. Only 11% of Internet users describe their main activity online as online training. Extrapolating the number of Mexican Internet users that may take part in online training, 11%, as a proportion of the total 51.2 million users allows us to calculate a potential online training market of 5.6 million. The data provided by AMIPCI does not specify the type of online training, if this is specifically English language learning, but does give a proxy for the online training market.

However it has been estimated that around 82 million people, roughly 70% of Mexicans, do not have access to a computer or the Internet. Access statistics worsen when split along economic lines, AMIPCI reporting that penetration of computers in Mexican households at the top of the economic pyramid was 5.5 times that of households at the bottom. Technological progress in Mexico has panned out unevenly across both economic and geographic segments of the population. However, increased access to mobile communications and digital resources are opening channels to learning English online. British Council LearnEnglish mobile download statistics show over 68,000 English language learning apps were downloaded in Mexico in the 2013-2014 financial year.

<sup>18</sup> <http://www.amipci.org.mx/>

# English learning motivations

As part of this research we gathered data from 1,000 Mexicans, mainly aged between 16 and 35 years old. The purpose of this primary data collection was to understand self-assessed levels of English across the general Mexican population. We aimed to understand if occupation, levels of education and household income affected the levels of English attained. Where respondents had studied English we aimed to understand how they assessed their levels of reading, writing and speaking, and why.

For those who indicated they had not previously studied English our aim was to understand why they had not and what might motivate them to start to learn the language. Both positive and negative respondents were then asked to give their view on learning English and the value they placed on English as a skill.

## Survey respondents' demographics

The largest proportion of our survey respondents (96%) were aged between 19 and 35 years old. 49% of respondents were female and 51% were male, 63% and 60% respectively said they previously studied English. Sixty-one per cent of the overall sample had previously studied English.

Age	No	Yes	% of total
Under 16	100	0	0
16	50	50	0
17	88	13	1
18	33	67	2
19	50	50	3
20	40	60	5
21	43	57	4
22	25	75	6
23	42	58	6
24	33	67	6
25	30	70	7
26	40	60	6
27	35	65	7
28	32	68	6
29	42	58	5
30	42	58	6
31	36	64	5
32	43	57	7
33	44	56	6
34	44	56	5
35	37	63	5
36	50	50	1
56	100	0	0
57	100	0	0
65+	100	0	0
<b>Grand Total</b>	<b>39</b>	<b>61</b>	<b>100</b>

Gender	No	Yes	Total
Female	37	63	49
Male	40	60	51
<b>Total</b>	<b>39</b>	<b>61</b>	<b>100</b>

N = 1000

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

## Proportion of primary respondents that have studied English by state

This following chart shows the proportion of respondents from our primary data collection phase that indicated they had studied English, represented by their state of residence. Some states had fewer than ten respondents, including Campeche, Colima, Nayarit, and Tlaxcala, making it even more difficult to draw conclusions regarding the geography of Mexico and English language learning.

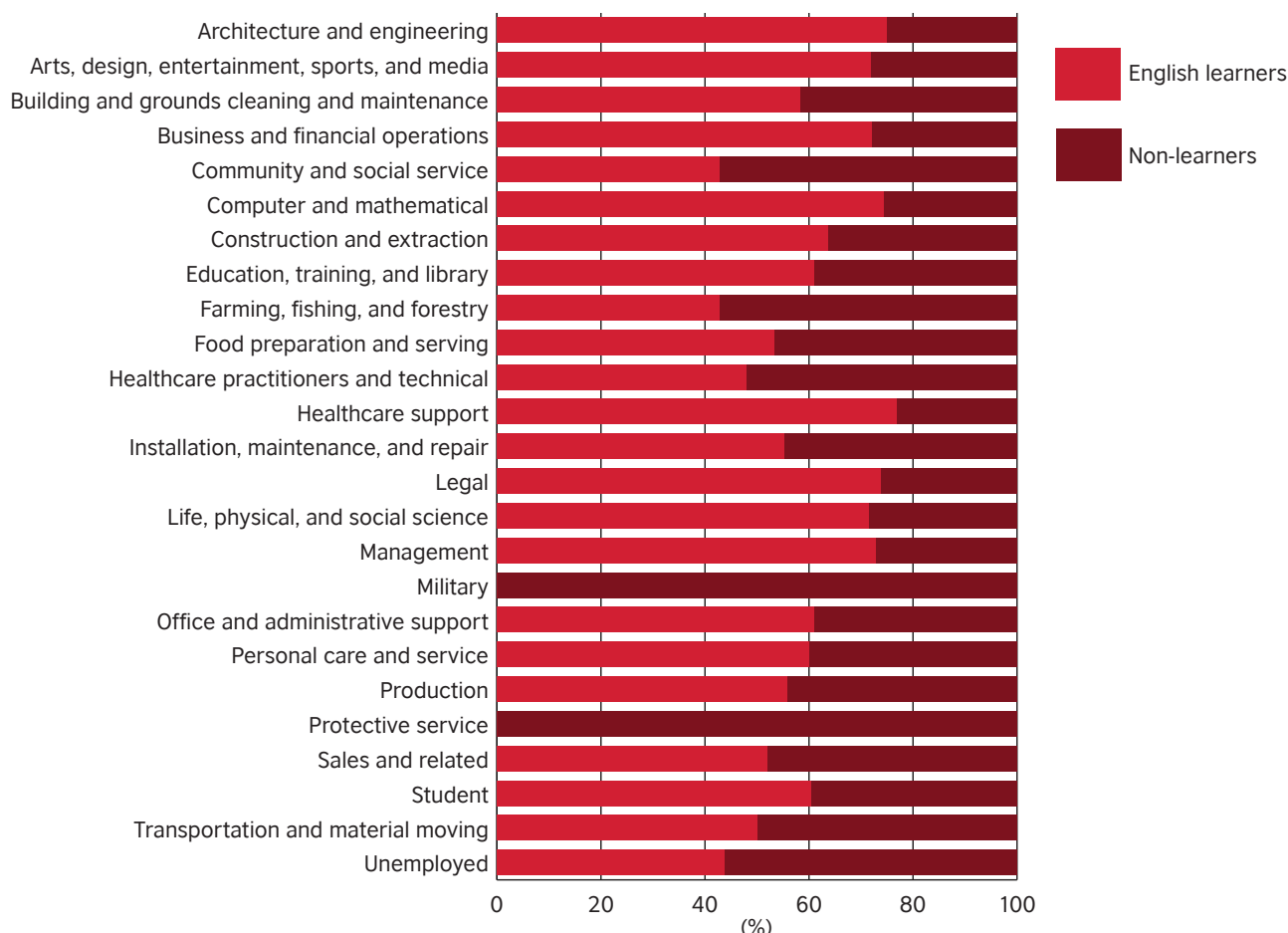
State	Per cent of respondents that have studied English
Aguascalientes	71%
Baja California	44%
Baja California Sur	47%
Campeche	20%
Chiapas	70%
Chihuahua	47%
Coahuila	70%
Colima	78%
Distrito Federal	76%
Durango	40%
Guanajuato	69%
Guerrero	67%
Hidalgo	80%
Jalisco	64%
México	49%
Michoacán	61%
Morelos	59%
Nayarit	33%
Nuevo León	63%
Oaxaca	56%
Puebla	75%
Querétaro	57%
Quintana Roo	64%
San Luis Potosí	55%
Sinaloa	43%
Sonora	50%
Tabasco	67%
Tamaulipas	76%
Tlaxcala	60%
Veracruz	50%
Yucatán	57%
Zacatecas	40%

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

## Occupation and English language learning

Survey respondents were asked to identify which of the following best describes their occupation from a drop down list. The graph below shows the list of occupations by the proportion of respondents that said they had or had not studied English.

**Occupation, have you ever studied English**



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

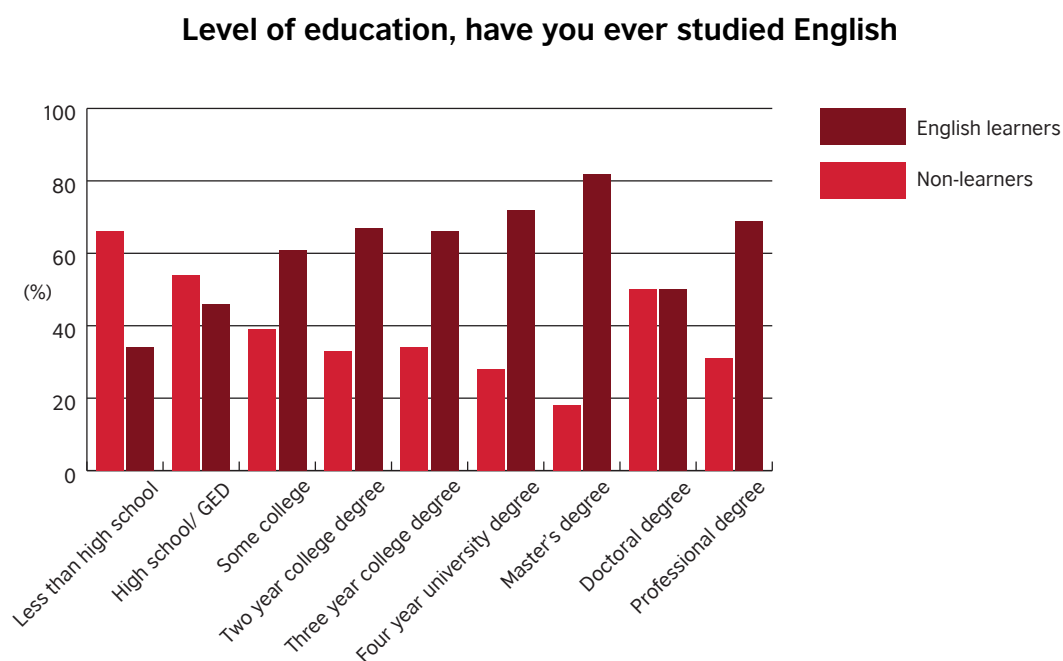
Occupations that had a high proportion of previous English language learners at 70% or above were: Management (73%), Life, Physical and Social Science (71%), Legal (74%), Healthcare support (77%), Computer and Mathematical (74%), Business and Finance operations (72%), Arts Design Entertainment Sports and Media (71%) and Architecture and Engineering (72%).

Occupations that had a low proportion of previous English language learners at over 50% were; Community and Social Service (57%), Farming fishing and forestry (57%), Healthcare Practitioners and Technical (52%), Transportation and Material moving (50%) and the Unemployed (56%). A caveat must be given here that the base number of respondents that self-selected Protective Service and Military occupations were not high enough to show any statistical significance.

Occupations that involve a higher level of education or academic qualification incorporate a high proportion of the respondents that had studied English. Interestingly a high proportion of those working in Arts, Design, Entertainment, Sports and Media had also studied English. Occupations that involve manual labour, a lower level of educational attainment, working with local communities or respondents that were not currently employed incorporated the highest proportion of the sample that had not studied English.

## Level of education and English language learning

According to survey results, there is a correlation between higher levels of educational attainment and previous study of English language.

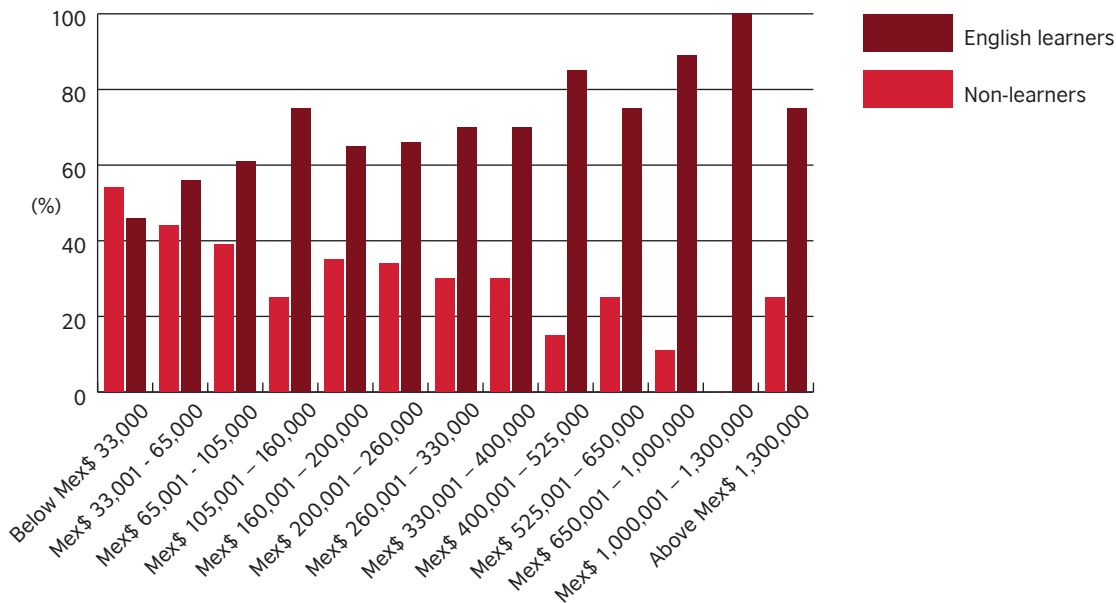


Source: British Council, Education Intelligence, Latin America Databank 2014

Of the respondents that had attained less than a high school level of education the higher proportion (66%) said they had not previously studied English and a majority of the respondents that had attained high school level (54%) also said they had not previously studied English. A higher proportion of those who had reached some college education (61%), a two year college degree (67%), a three year college degree (66%), a four year college degree (72%), a Master's degree (82%) and professional degree (69%) had also previously studied English. A caveat that must be given here is the sample size of respondents who had attained a Doctoral degree was not large enough to be statistically significant. Anecdotaly, though people with higher levels of education are more likely to have studied the language, this does not necessarily correlate with being proficient in the language.

## Household income and English language learning

Household income, have you ever studied English



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

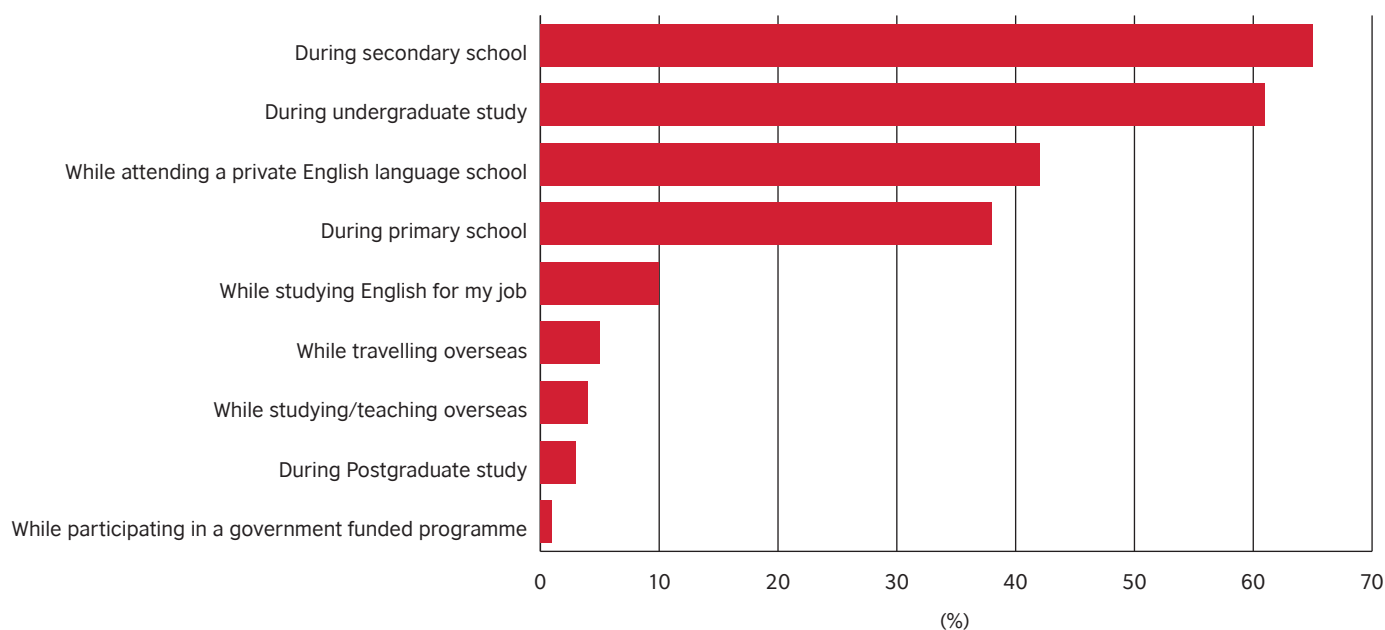
Our data shows a direct correlation between household income and previous study of the English language. Only when respondents indicated their approximate yearly household income before taxes was below Mex\$ 33,000 was there a higher proportion of respondents that had never studied English (No 54%, Yes 46%). With the remaining incremental salary increases, the number of respondents that indicated they have studied English grows or remains significantly positive; Mex\$ 33,001 – 65,000 (56% Yes), Mex\$ 1,000,001 – 1,300,000 (100% Yes). A caveat here must be given that the sample size for the largest income bracket was not large enough to be statistically significant.



## Motivations for studying English

Respondents that had previously studied English (61%) were asked to indicate when they had done this. This question was a multiple choice question and allowed respondents to select any number of answers that were relevant to their English learning experience.

### When did you study English

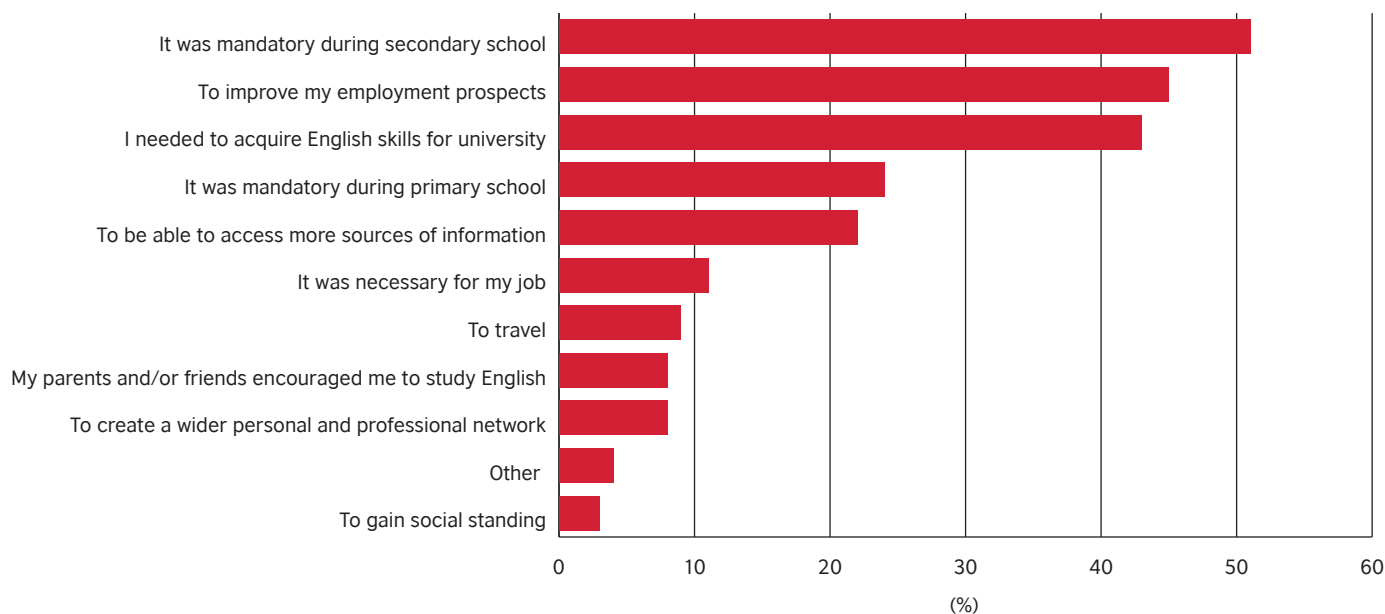


Source: British Council, Education Intelligence, Latin America Databank 2014

Sixty-five per cent of positive respondents indicated they had learnt English during secondary school, 61% during undergraduate study, 42% whilst attending a private English language school, 38% during primary school. Only 10% said they had learnt English for employment, 5% whilst travelling overseas, 4% whilst studying/teaching overseas, 3% during postgraduate study and finally only 1% of respondents said they learnt English whilst participating in a government funded programme.

Respondents were then asked to indicate why they studied English; this question was also a multiple choice giving respondents the opportunity to select as many responses as applied to their English learning journey.

### Why did you study English



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

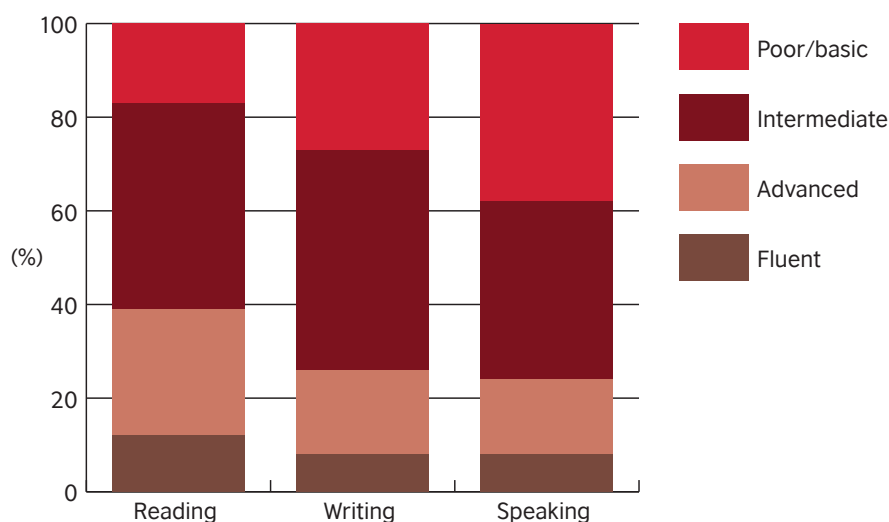
Fifty-one per cent of English learners said they had learnt English as it was mandatory at secondary school, 45% to improve their employment prospects, 43% as they needed to acquire English as a skill for university. 24% said they studied English as it was mandatory at primary school level, 22% as it allowed them to access more information sources, 11% as it was necessary for their job, 9% to travel, 8% as they were encouraged by their friends and family, 8% so they could create a wider personal and professional network, 3% said English could help them gain social standing. Of the respondents that selected the other option (4%), the largest proportion said they studied English as they liked the language.

Our data has shown that the greatest motivations for studying English were mandatory secondary school learning, whilst studying at undergraduate level and for employment, via private English language school training.

## English proficiency

All respondents who indicated they had previously studied English were asked to rate their own level of reading, writing and speaking. They were asked to indicate whether they felt each of these areas were Poor/basic, Intermediate, Advanced or Fluent.

### Please rate your current level of reading, writing and speaking in English



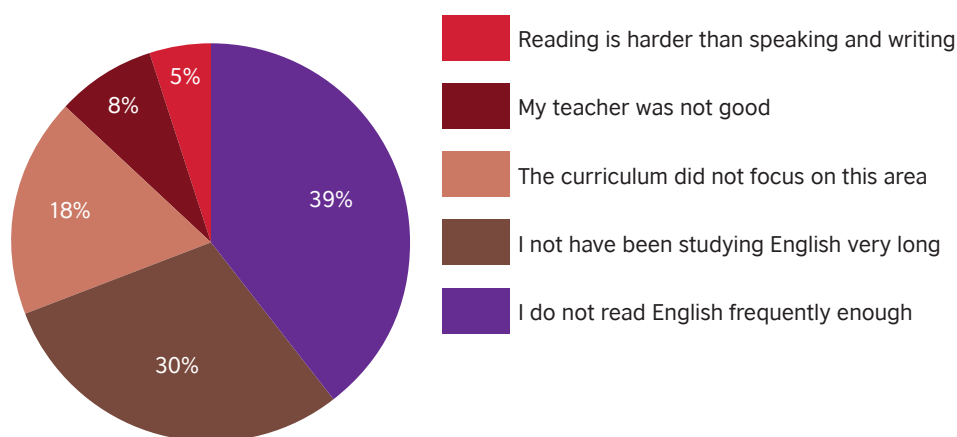
Source: British Council, Education Intelligence, Latin America Databank 2014

The data revealed that respondents felt that their reading skills were strongest overall: 12% indicated they were fluent at reading English, 27% advanced, 44% intermediate and only 17% felt they had poor or basic reading skills. Writing was ranked by respondents as the next most proficient skill: 8% felt their writing skills were fluent, 18% advanced, 47% intermediate and 27% indicated their writing skills were poor or basic. Speaking in English was ranked by respondents as constituting their lowest level of proficiency: 8% felt their speaking skills were fluent, 16% advanced, 38% felt they were intermediate at speaking English and 38% felt they were poor or basic at speaking in English.

## Reading skills in English

Respondents that rated themselves as either Poor/basic or Intermediate were asked to indicate why they felt their reading skills were not better. Thirty-nine per cent said it was because they did not read English frequently enough, 30% said it was because they had not been studying English for very long, 18% said their English curriculum did not focus on this area, 8% said their teacher was not good and 5% said they felt reading is harder than speaking and writing.

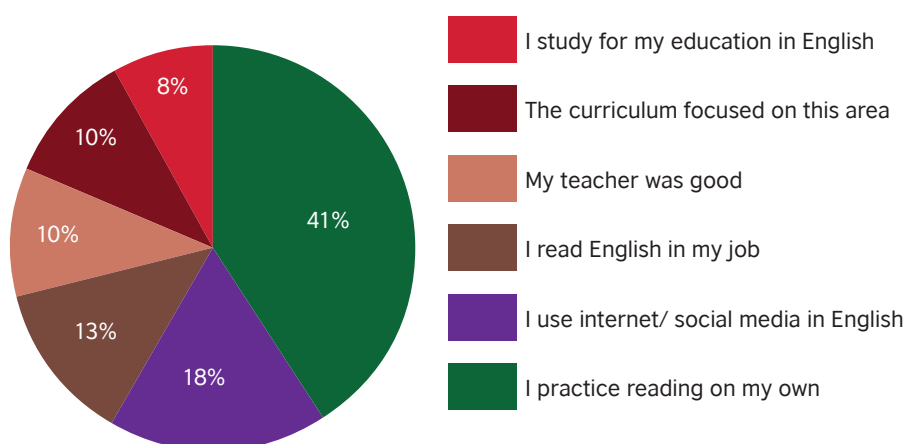
### Why aren't your reading skills better



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

Respondents that rated themselves as either Advanced or Fluent at speaking in English were asked to indicate why they felt their reading skills were good. 41% said it was because they practice reading on their own, 18% said it was because they use the Internet and social media in English, 13% because they use English for their job, 10% said it was due to good teaching, 10% due to their school curriculum focusing on this area and 8% because they studied for their education in English.

### Why are your reading skills good



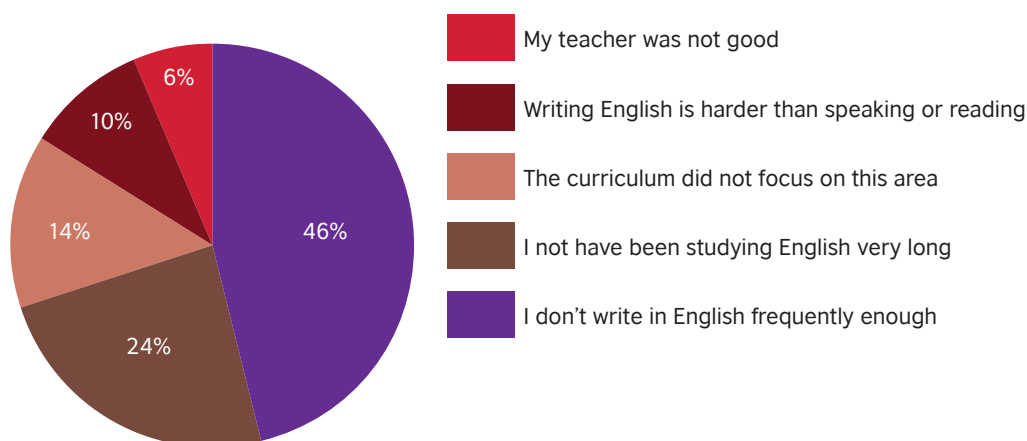
Source: British Council, Education Intelligence, Latin America Databank 2014

High or low proficiency in English reading was attributed by the majority of respondents to their own use or lack of practice with the language. Only a small proportion of respondents felt ineffective teaching or lack of emphasis in the curriculum had a positive or negative effect on their reading skills. Interestingly the use of social media in English was shown to be the second most important factor for those who felt they had advanced or fluent reading skills. This was echoed in our qualitative interviews with education professionals who saw an increase in students' use of English language social media and Internet more broadly as improving English skills.

## Writing skills in English

We asked every respondent to indicate why they felt their English writing skills were Poor/basic or at an Intermediate level. 46% said they felt it was because they did not write in English frequently enough, 24% due to the length of time they had been studying, 14% the curriculum did not focus on this area, 10% said they felt writing was harder than speaking or reading and only 6% said this was due to the teaching they had received.

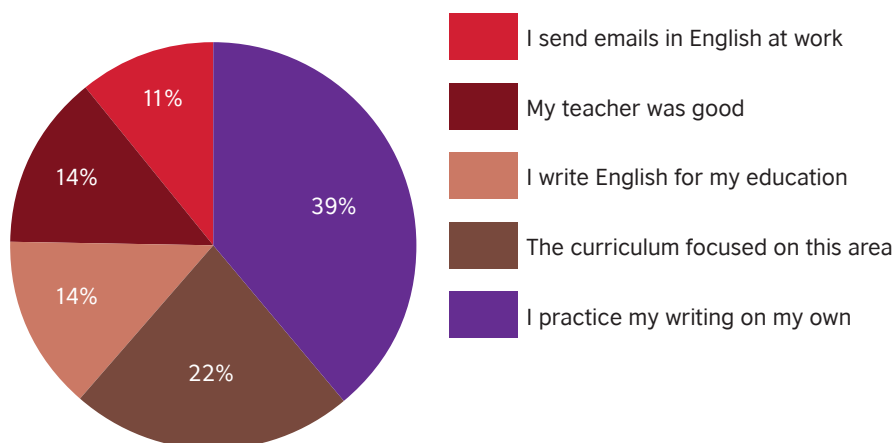
### Why aren't your writing skills better



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

Those who had ranked their writing skills as Advanced or Fluent were asked to indicate why they felt this was. Thirty-nine per cent said this was due to their own practice, 22% attributed good writing skills to strong focus from their school curriculum, 14% said they wrote English for their education, 14% said their teacher in this area was good and 11% said their strong English writing skills were due to emailing as part of their job.

### Why are your writing skills good



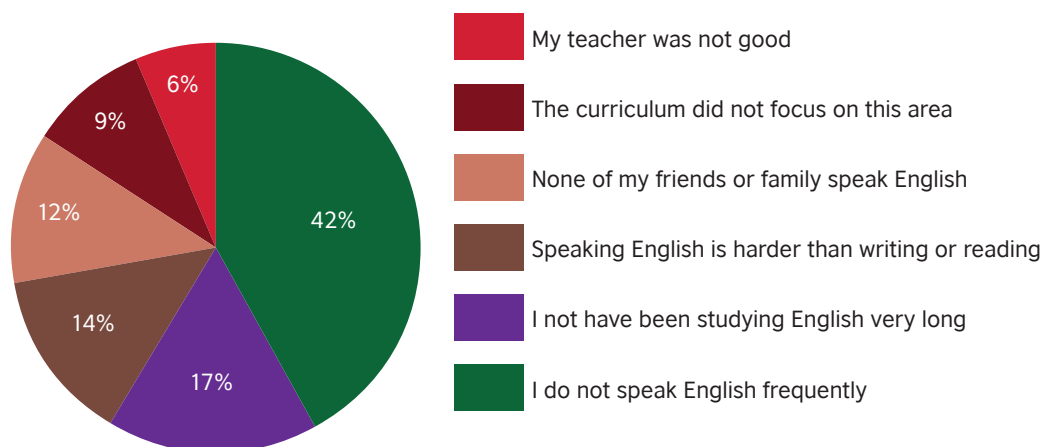
Source: British Council, Education Intelligence, Latin America Databank 2014

High or low proficiency in English writing skills was also attributed to respondents practicing this skill frequently or infrequently. Our data has shown that the continued use of skills learnt during mandatory schooling and university are crucial to retaining an Advanced or Fluent level of both reading and writing in English.

## Speaking skills in English

Finally, speaking skills were assessed in the same way by asking respondents to indicate why they felt this area was Poor/basic or Intermediate. Forty-two per cent attributed Poor/basic or intermediate speaking skills to frequency of use, 17% said this was due to length of time studying, 14% felt speaking was harder than writing or reading, 12% attributed this to lack of friends or family that speak English. Only 9% said this was due to lack of focus on this area in the curriculum and 6% said their teacher was not strong in this area.

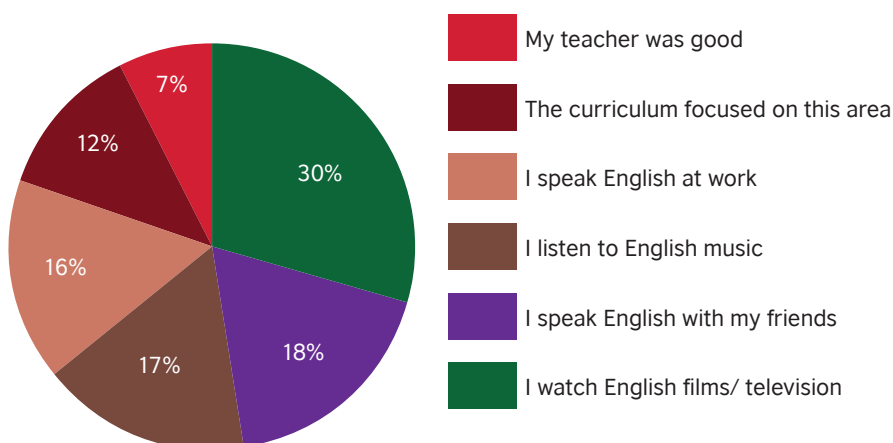
### Why aren't your speaking skills better



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

Those who self-assessed their speaking skills as Advanced or Fluent were asked to indicate why. Thirty per cent said this was due to watching English films/television, 18% said they spoke English with their friends, 17% said they listened to English music, 16% they spoke English at work, while only 12% said their high proficiency at speaking English was due to their schools curriculum focusing on this area and just 7% said their teacher was good.

### Why are your speaking skills good



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

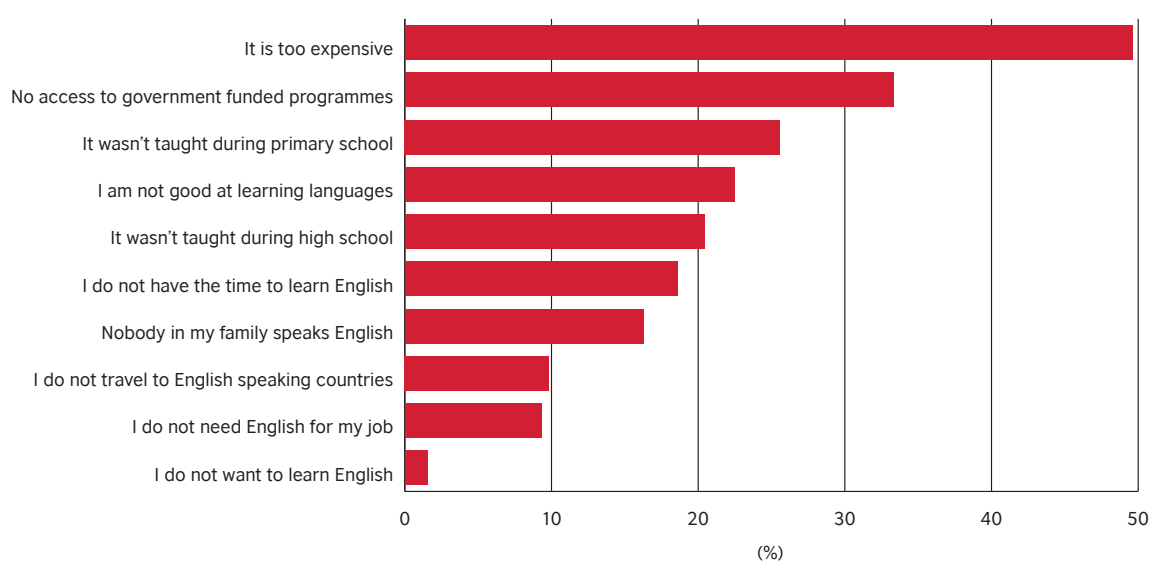
Our data shows that high proficiency in English speaking skills is largely due to environmental factors. Frequently consuming English speaking films, television and music, being able to speak English with friends and at work are crucial factors to ensure frequent usage and retention of English speaking skills; the highest proportion of respondents felt this was the hardest of the English competencies (14%).

## Barriers to studying English

The 39% of our total sample who indicated they had not studied English before were asked to indicate why. This question was multiple choice and respondents were allowed to select any number of answers they felt were relevant to their situation.

The highest proportion, 50%, said they had not studied English as it was too expensive, 33% said they had not had access to government funded programmes, 26% said it was not taught during primary school, 22% said they felt they were not good at learning languages, 20% said they were not taught English during high school, 19% said they did not have time, 16% said nobody in their family speaks English, 10% as they did not travel to English speaking countries, 9% said they do not need English for their job and only 2% said they did not want to learn English.

### Why have you chosen not to study English?

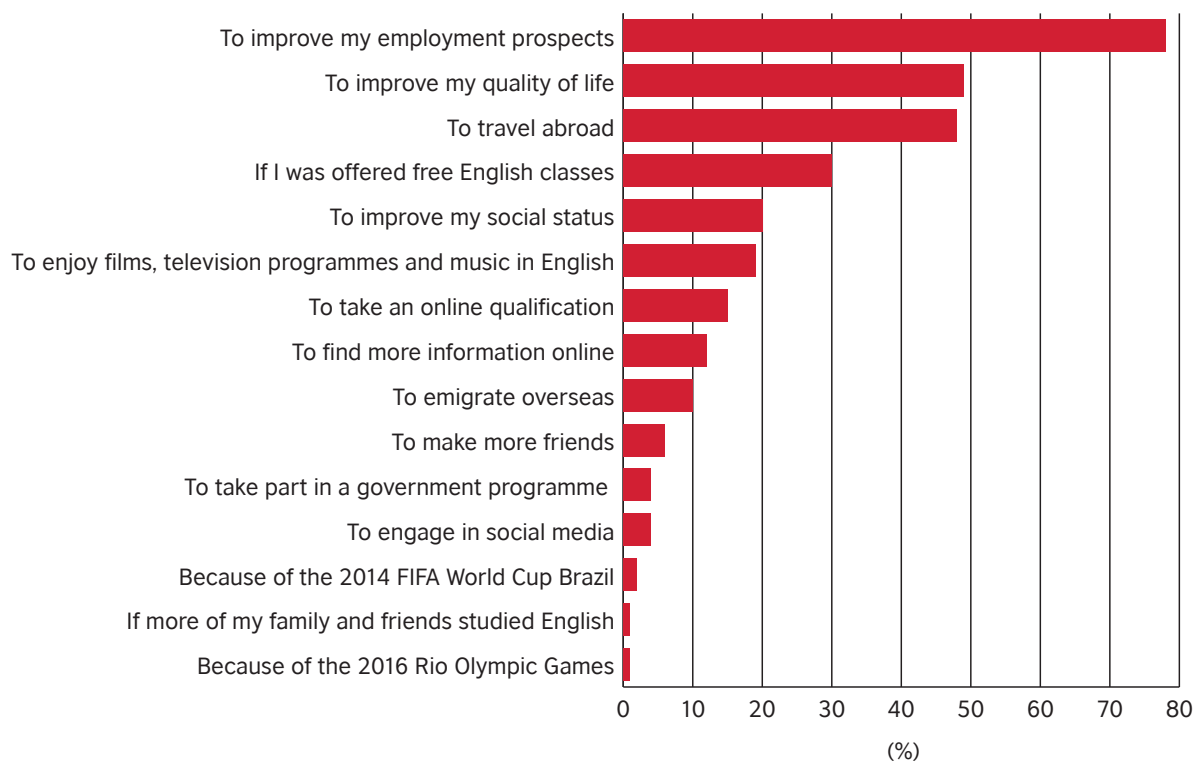


Source: British Council, Education Intelligence, Latin America Databank 2014

Cost and access to learning English, both at school and on government-funded programmes, were cited as the main barriers to learning English. This correlates with the findings from the positive survey respondents that early introduction to English learning at primary and high school are some of the main motivating factors to learn the language. Only a very small number of survey participants attributed not having learnt English to it not being a necessary skill for employment and the smallest number said they had no desire to learn English.

Having determined the barriers respondents felt had prevented them from learning English our aim was to understand what would motivate them to start learning English.

### Possible reasons to start learning English



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

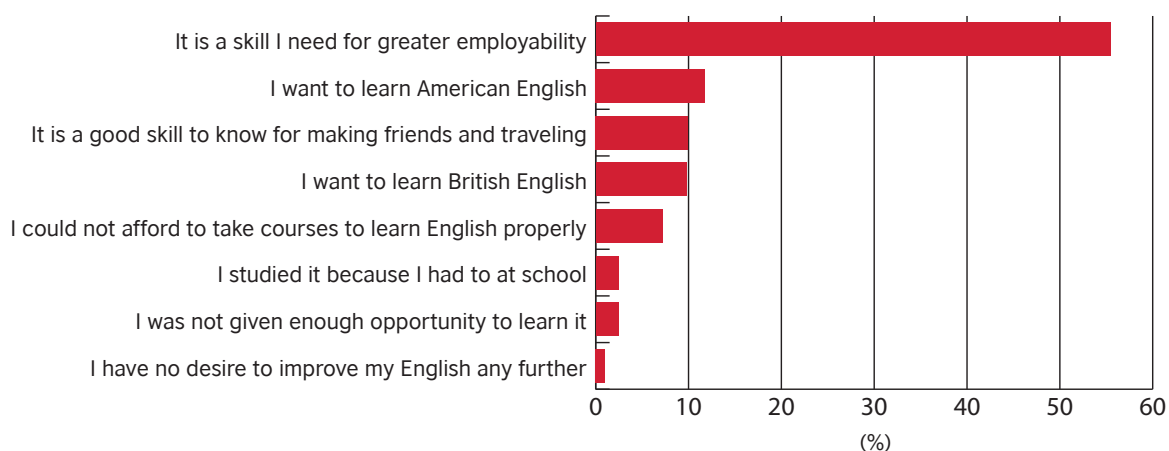
The highest proportion (78%) said they would start to learn English to improve their employment prospects, 49% said to improve their quality of life, 48% to travel abroad, 30% if they were offered free English classes, 20% to improve their social status, 19% to enjoy English language media, 15% to take an online qualification and 12% to find more information online. Only 10% said they would learn English to emigrate overseas, 6% to make more friends, 4% to take part in a government programme, 4% to engage in social media, 2% because of the 2014 World Cup, 1% if more of their family and friends studied English and finally less than 1% because of the Rio Olympic Games.



## View of learning English

Both groups of survey respondents who indicated they had and hadn't previously studied English were asked to select a response that best described their view of learning English. Speaking English was seen as a skill for greater employability by the largest proportion of positive respondents (56%), followed by wanting to learn American English (12%). 10% said they felt it was a good skill for making friends and 10% said they wanted to learn British English, 7% they could not afford to take courses to learn properly, 2% said they had learnt it because it was compulsory at school, 2% also said they felt they had not been given the opportunity to learn it and finally only 1% said they had no desire to improve their English further.

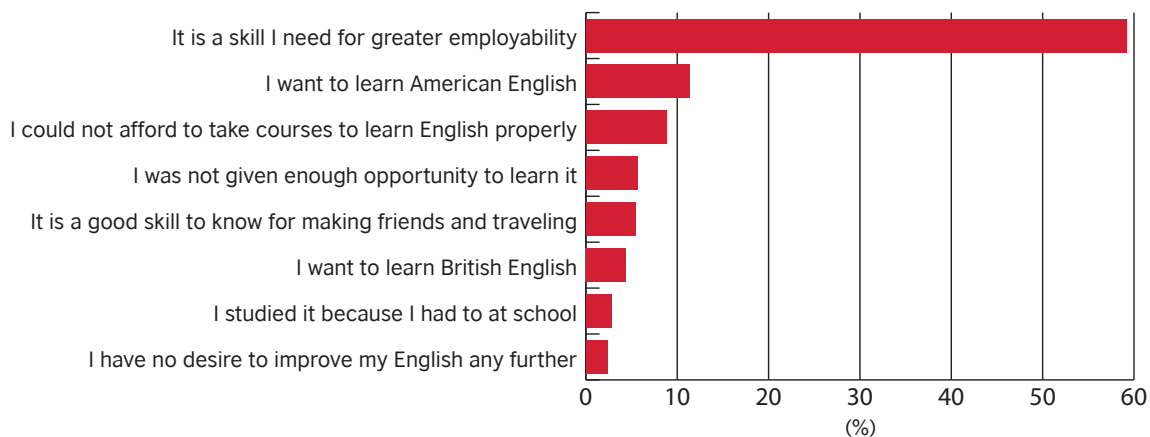
### Positive respondents - describe your view of learning English



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

The largest majority of negative respondents (59%) said they viewed English as a skill they need for greater employability. 11% said they wanted to learn American English, 9% said cost had prevented them from learning English properly, 6% they were not given an opportunity to learn it, 6% saw it as a good skill for making friends, 4% they want to learn British English, 3% they studied it at school because they had to and only 2% said they had no desire to study English.

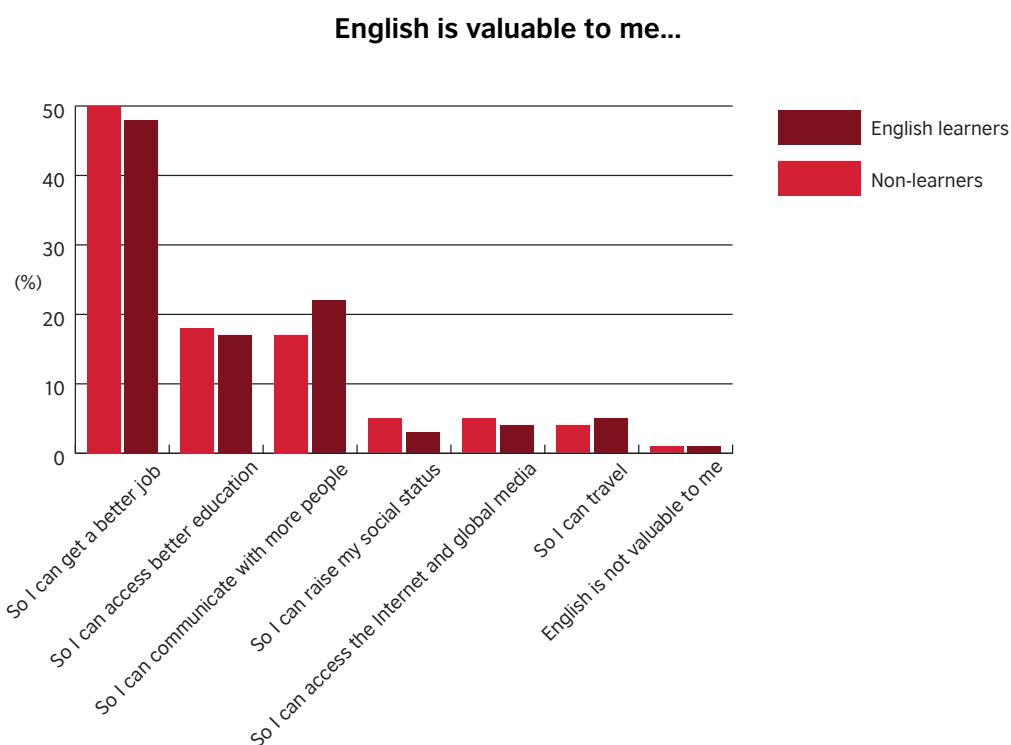
### Negative respondents - describe your view of learning English



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

## Value of English learning

The final question that was asked of our sample was about the value they placed on learning English. Our aim was to understand if the greatest value was placed on English for economic, educational or personal reasons.



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

Our data showed clear correlation between the value placed on English by both positive and negative respondents. Fifty per cent of negative and 48% of positive respondents said English was valuable to them as it could enable them to get a better job. Eighteen per cent of negative and 17% of positive respondents felt English was valuable as it would allow them to access better education opportunities. Twenty-two per cent of positive and 17% of negative respondents felt the value of English was being able to communicate with more people. Raising social status (5% negative, 3% positive) being able to travel (5% negative, 4% positive) accessing the Internet and global media (5% positive, 4% negative) were seen as relatively less important factors in determining the value of English. Only 1% of negative and 1% of positive respondents said English held no value to them.

Our data has shown that English is viewed as a skill for greater employability by Mexican survey respondents and a high value is placed upon it, by those who have and haven't attained a level of proficiency, as a route to access better employment.

# Employer demand for English

To understand more fully the demand for English within business and industry in Mexico, we surveyed 110 employers from different industries to identify the value they place on employees with English language skills and in which sectors English is more widely used. The companies that took part in our research varied in their number of employees from 20 and below, to over 1000. Each of the 31 states was represented within the sample. All 110 individuals representing organisations were at director or managerial level. 95% indicated their native language was Spanish. Other native languages identified were French, Hindi, Mandarin, Hebrew and Norwegian, each with less than 1% of the total. 98% of respondents said they spoke English, and when asked to indicate their own level of English, 8% said they held a basic level, 36% a proficient level and 54% self-assessed their own English level as fluent. The very small proportion (2%) who said they could not speak English, said they would like to learn and improve their English skills as they felt it is necessary for their job, and would enable them to create wider personal networks.

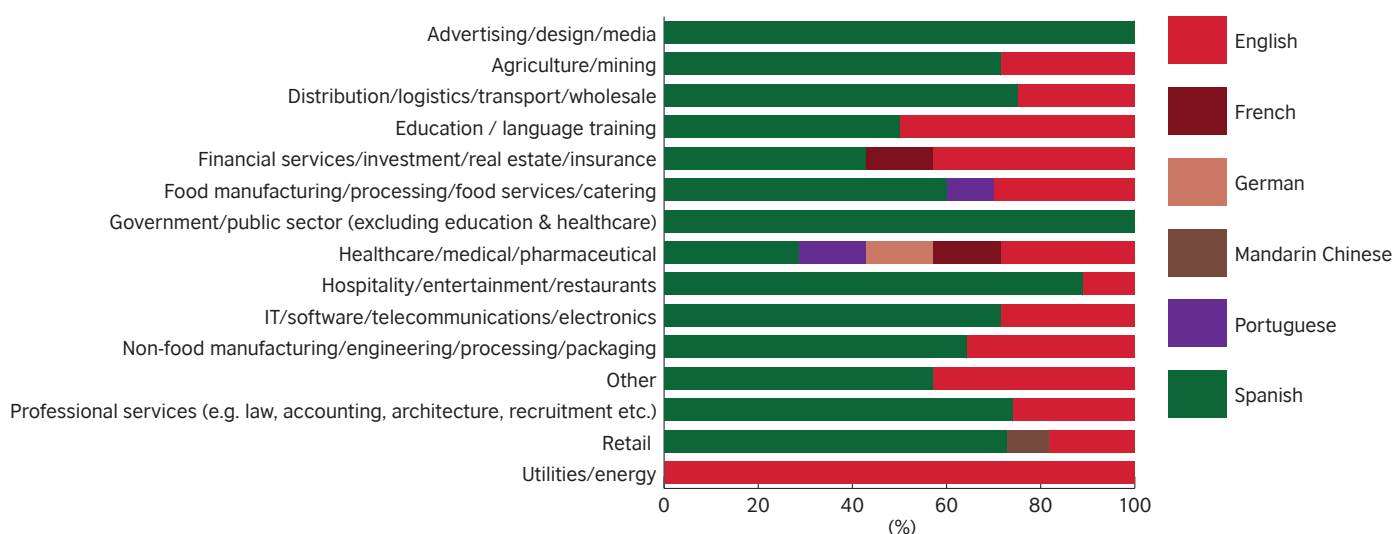
The sample was representative of 15 sectors of industry, the highest proportion - 23% - came from Professional services, 12% from Non-food manufacturing and engineering, 12% from Distribution and wholesale, 8% from Retail, 7% from Food manufacturing, 7% from Hospitality and entertainment, 5% from Agriculture and mining and 5% from Financial services. The category 'other' was chosen by 6% of respondents, this self-selected group indicated their business involved: Arts, NGO, Automotive engineering, Manufacturing process equipment, Furniture industry and Electronic manufacturing.

## Language used in business communication

Respondents were asked to identify the main language used to communicate internally within their company and were able to select multiple answers to this question. From the total sample 80% said the main language was Spanish, 33% English, 2% Portuguese, 2% French, 1% German and 1% Mandarin Chinese.

The graphic below shows the main language of internal communication represented by different industries. IT and Software (29%), Healthcare and medical (29%), Agriculture (29%), Food manufacturing (30%), Manufacturing (36%), Financial services (43%), those who selected the category other (43%) and Education and language training (50%) had the highest use of English as the internal language of business communication. The sample size represented for Utilities and energy was not large enough to show statistical significance. The Healthcare and medical industry showed the most varied use of language for internal business communication, including English, Portuguese, Spanish, French and German.

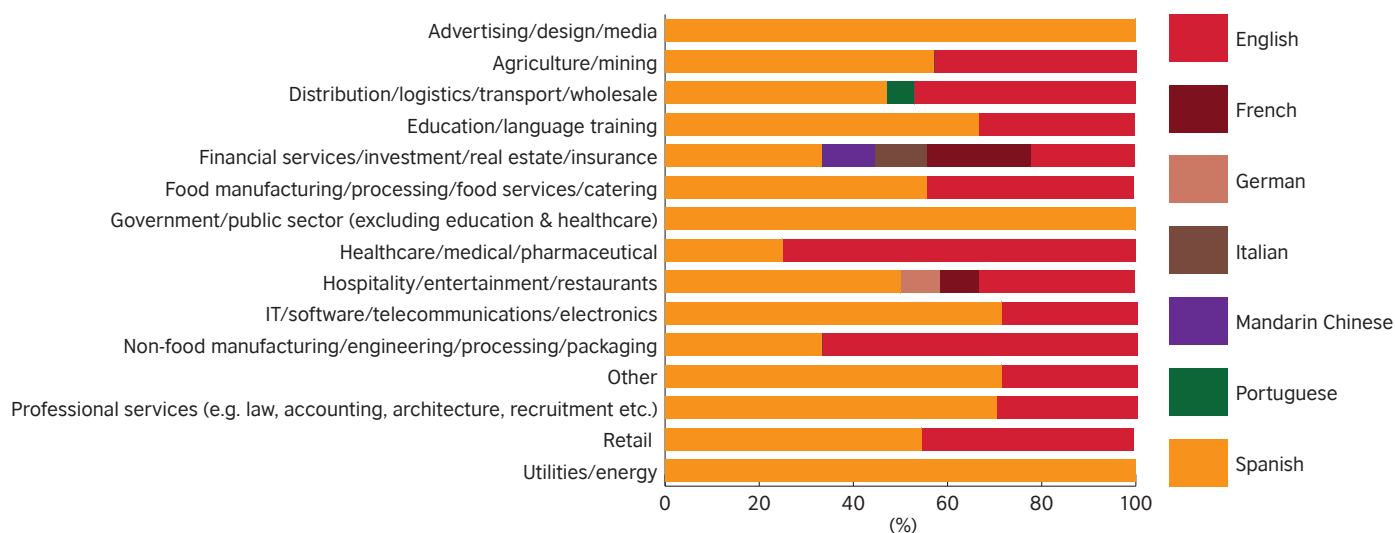
### Main language used to communicate internally within their company



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

Research participants were then asked to indicate the main language used to communicate externally with customers and suppliers given the chance to select multiple languages they used. A lower proportion, 68%, said Spanish was the main language used for external communication. The proportion selecting English as the main language of external business communication increased to 47%, French 3%, German 1%, Portuguese 1%, Italian 1%, Mandarin Chinese 1% and Hebrew 1%. The graph below shows which language was chosen by representatives from each industry.

### Main language used to communicate externally with customers and suppliers



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

Our data shows that English is used far more frequently as the language of external business communication. Healthcare and medical (75%), Manufacturing (67%), Distribution (47%), Retail (45%), Food manufacturing (44%), Agriculture (33%), Education and training (33%) Hospitality (33%) and Professional services (30%) fell into that group, indicating 30% or more use English as the main language when conducting business externally.

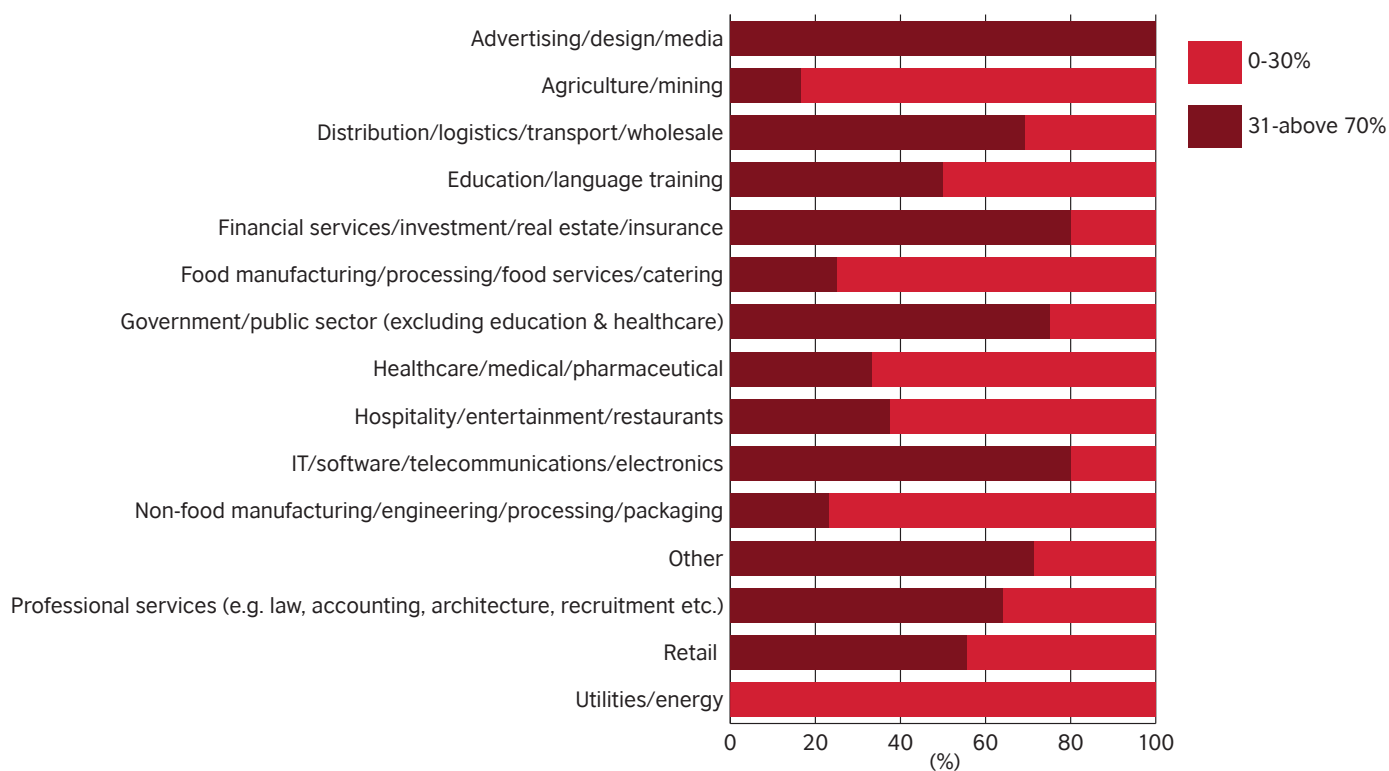
Financial services represented the most linguistically diverse industry when conducting external business, using English, Spanish, French, Italian and Mandarin Chinese.

## English proficiency

Business representatives were asked to indicate the proportion of staff within their organisation with a good level of English proficiency. They were asked to select one of eight points on a scale; less than 5%, 5 - 10%, 11 – 20%, 21 – 30%, 31 – 40%, 41 – 50%, 51 – 70% and Above 70%. Responses to this showed two distinct profiles, those with 0 – 30% of employees with good English proficiency and those with 31 – above 70%.

Industries that were assigned the highest proportion of proficiency by participating managerial staff were Education and training (50%), Retail (56%), Professional services (64%), Distribution (69%), those that selected other (71%), Government and public sector (75%), IT and Software (80%) and Financial services (80%). The sample size for Advertising and design was too small to show statistical significance.

### Proportion of employees with good level of English proficiency



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

## English training

Fifty-one per cent of the total sample said their company did offer English language training and development for existing staff or new staff. 50% of this group said they offered in-house English classes, 30% said they had a training partnership with a private external company, 18% said they provided funding for English tutoring, 16% had internal provision and 14% said they offered online training. When asked what they believed was the main reason the general population of Mexico learnt English, 77% of employers surveyed indicated they believed it was to improve their employment prospects.

## The value placed on English by employers

Participating representatives who are directors or those in managerial positions within Mexican businesses were asked to indicate the importance and value they placed on English language as a skill in their job, their personal life, as essential to the growth and progress of their organisation, as a 'must have' qualification in their current job and as an essential skill when hiring new staff.

### The importance and value of English

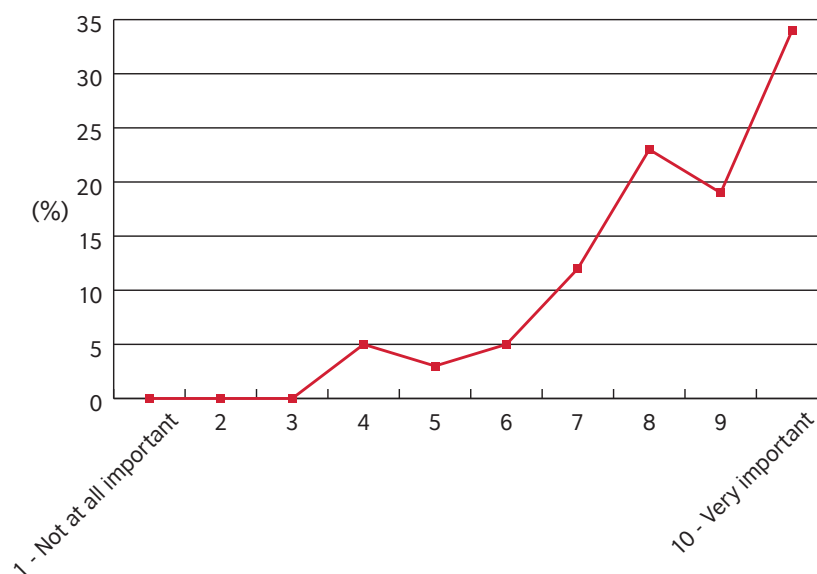


Source: British Council, Education Intelligence, Latin America Databank 2014

Over 69% of participants showed they agreed somewhat or strongly with each of the above statements, 94% that having English skills are important to them in their own job. The smallest proportion (69%) said they felt English was an essential skill when hiring new staff. Further analysis of the data showed that Food manufacturing, Manufacturing, Government and the public sector and Distribution and logistics were the businesses that viewed English language skills as least essential when hiring new staff. This may be illustrative of the type and level of role these businesses and individuals recruit for not being positions that require communication in foreign languages.

The final survey question asked participants to think about how important English was as a skill for their employees to progress and grow their business. They were asked to rank their view of its importance using the scale of 1, not at all important to 10, very important. Following this they were asked to give reasons why.

## How important is English as a skill for your employees, to progress and grow your business



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

The largest number of participants ranked English as “Very important” with the highest 10 score, 34%, 19% gave the score of 9, 23% gave the score of 8. After giving their ranking score of the importance of English, business representatives were asked to say why, and given the chance to type in an open question. A number of comments included references such as essential for growth, collaboration with the USA, the international language of communication, dealing with foreign clients, customers and globalisation. Some verbatim comments included:

*‘We work globally with Italian, American, French, Canadian, Chinese and English so that we can communicate without problems.’*

---

*‘A teacher can help the student.’*

---

*‘Because it is essential to communicate with some business partners, and to know to operate the products we sell.’*

---

*‘Many foreign companies are coming to the country to do business.’*

---

*‘Management positions have contact with people overseas so we must speak, however directors are old and speak it very badly.’*

---

*‘The care we provide to customers and suppliers in your language generates greater confidence.’*

---

*‘Because of the technology we use. The international influence of the organizational culture.’*

---

The following word cloud shows the terms most often used in these answers, with the size of the word indicating the frequency with which it occurred.





# Factors shaping demand for English learning in Mexico

Through this data collection and analysis we have been able to explore a number of factors that influence levels of English learning in Mexico and identify new ways in which these factors are currently impacting the English learning environment and future demand.

## English for national and personal economic growth

Our data has revealed that over half of the Mexican demographic that took part in our survey view English as a skill needed for greater employability (58%). Furthermore, the value they place upon English is based on securing better employment (49%). Having the ability to speak English is viewed by the majority of Mexicans as directly contributing to their personal economic growth. Forty-seven per cent of businesses that took part in our research indicated that English was the main language used in external business communication. Eighty-six per cent also indicating they believe English is essential to the growth and progress of their organisation. In data supplied by the Mexican government's Education Ministry, English was shown as contributing significantly to national economic prosperity having acquired value as linguistic capital and bringing an estimated US\$ 27 billion a year to Mexico via growth in the services sector.

## Economic development and global competitiveness

Our analysis has shown occupations that acquired a high proportion of positive English language learners at 70% or above were: Management (73%), Life, Physical and Social Science (71%), Legal (74%), Healthcare Support (77%), Computer and Mathematical (74%), Business and Finance Operations (72%) and Architecture and Engineering (72%). Industries that were assigned the highest proportion of proficiency by managerial staff participating in our survey were Education and Training (50%), Retail (56%), Professional Services (64%), Distribution (69%), Government and Public Sector (75%), IT and Software (80%) and Financial Services (80%). Many of these occupations are within the service sector and have been direct recipients of increased growth via foreign investment. In 2013 Mexico experienced a record US\$35.2 billion in foreign direct investment, nearly double the level in 2012.

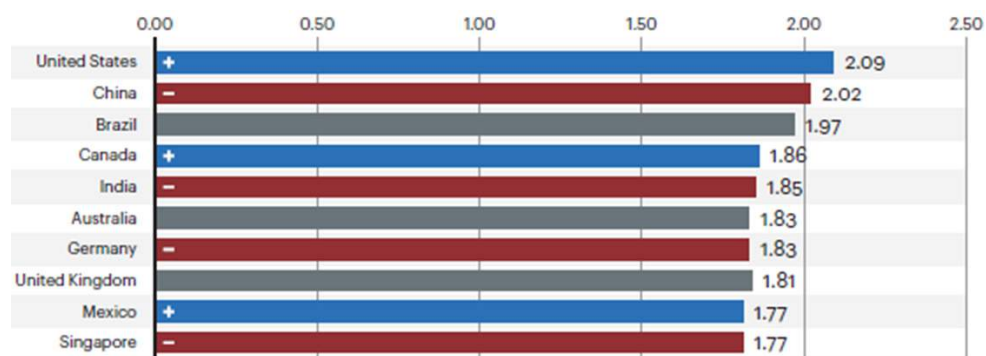
According to the Economic Commission for Latin America and the Caribbean (ECLAC), improving economic development and competitiveness depends on investment in human capital, infrastructure, machinery, and technology. A number of recent initiatives in Mexico, including the NEPBE, have shown the Mexican government's commitment to this agenda. In 2013 constitutional reforms opened Mexico's long underperforming Energy sector to private sector investment. The government recognised that huge investment was needed to modernise the energy sector and private partnership was seen as a positive opportunity. It has been reported that this historic constitutional change to a previously nationalised system will grow not only energy intensive industries but benefit the economy at large. Growth in FDI in 2013 was also due to Belgian brewer Anheuser-Busch InBev's acquisition of Mexican beer giant Grupo Modelo.

The need to modernise Mexico's national infrastructure to enable much needed domestic development and international competitive performance was reflected in the President's 2013 Transport and Communications Infrastructure Investment programme 2012 – 2018, part of the National Infrastructure Programme, or NIP, the aim of which is to secure Mexico's position as a hub for value-added logistics and transportation. Most of this investment is expected to come from public-private partnerships (PPPs), worth in excess of US\$100 billion. The roster of projects for development includes 60 new roads (15 toll roads, 29 freeways, and 16 rural roads); three passenger railroads; seven ports; seven airports; and major improvements to the telecommunications system, boosted by the launch of two new satellites<sup>19</sup>.

<sup>19</sup> Mexico's Infrastructure Master Plan; Foreign Affairs, September 2013

The 2013, A.T. Kearney FDI Confidence Index that ranks countries on how political, economic and regulatory changes will affect FDI, based on a survey of more than 300 executives from 28 countries. In 2013 Mexico was ranked in 9th place due to strong manufacturing and exports and close links with the USA and Canada.

### 2013 A.T. Kearney FDI Confidence Index



As the Mexican government continues to reform and open the country's industries to investment from international business, the demand for English language skills will continue to rise in a number of roles in growth areas. General Motors, Bank of America, Nestle, Audi, Bombardier, Honda, Volkswagen and Mazda are all reported to be setting up operations across Mexico<sup>20</sup>.

The tourism industry, Mexico's fifth biggest source of revenue, will now be included in the country's infrastructure strategy. The government has expressed interest in private investment to develop tourism as the number of visitors increase from North America countries as well as those from emerging markets such as Brazil, Russia and China. Throughout the stakeholder interviews carried out for this research, there was consensus that tourism and the opportunities the industry brings for employment was a considerable driver for English language learning. Reports suggest that although increased tourism may come from non-English speaking countries, it is felt that English is the international language of tourism allowing communication between many nationalities. As a result, many Mexicans in the Baja California, Central Mexico, Pacific Coast and Yucatan Peninsula regions of Mexico have a higher level of English proficiency. Foreign investment contributing to the growth and development of Mexico's industrial strengths are likely to impact the demand for a skilled work force with English language skills.

## Level of education and the need to speak English

Our data showed a clear correlation between higher levels of educational attainment and previous study of English language. Fifty-four per cent of respondents that had attained high school level education said they had not previously studied English, with only 46% saying they had. However 82% of those with a master's degree had studied English. OECD data shows that younger Mexicans are now attaining higher levels of education than previous generations and gross enrolments are increasing at all levels. However in 2011, around 50% of over 25s in Mexico left formal education having only achieved secondary level. In the same year, 29.5% of 25-29 year-olds in Mexico were neither in employment, education or training. The government's focus on driving up levels of English in basic education could in theory reach a large majority of Mexico's population as gross enrolment at this level is so high, estimated at 100%. Investment in the development of Mexico's human capital is essential if aspirations to become a strong economy are to be achieved.

The growing number of Mexican students that enter tertiary education, which in 2012 was 29%, can often find that, in order to progress to postgraduate level study to carry out scientific research in their chosen academic discipline or take part in study abroad opportunities in non-Spanish speaking countries, they must supplement their English to achieve the level

<sup>20</sup> The 2013 A. T. Kearney Foreign Direct Investment Confidence Index, 'Back to Business: Optimism and Uncertainty'.

necessary. According to UNESCO Institute for Statistics there were approximately 26,800 Mexican students overseas in 2012. The United States is the most popular destination, attracting around 13,400 students, and with programmes like the US State Department's 100,000 Strong in the Americas the US continues to be an attractive destination. This is followed by Spain (2,500), France (2,200), Germany (1,600), the UK (1,500) and Canada (1000). Studying English to attain adequate scores to take part in study abroad programmes often has a cost implication for students as some universities charge additional fees for English tutoring. Stakeholders that we interviewed commented that students often can't reach the required TOEFL level and therefore do not pursue their study abroad goals. One university administrator that took part in our interviews commented that 'English is seen as an obstacle, not an opportunity'. They believe many students aspire to study overseas, but cannot because their English does not reach the required standard. It was iterated by a number of university administrators that students who do not have aspirations to pursue an academic subject that requires English or to study abroad in an English-speaking country simply do not feel the need to learn the language. The majority of students make little connection with English requirements throughout their education and future career.

## Unequal societal development

Higher levels of education attainment and English proficiency are more common in wealthier Mexican families. Unsurprisingly, the data collected for this research showed a direct correlation between household income and proportion of respondents that had studied English. With households bringing in an annual income of Mex\$ 33,001 – 65,000, 56% of participants had studied English, while households with income levels of Mex\$ 1,000,001 – 1,300,000, 100% of participants had studied English. Considerable debate exists around the size and dynamics of Mexico's middle class, but there is consensus that this group is growing in number. According to Mexico's National Institute of Statistics and Geography (INEGI) in 2010 the middle class represented 42.4% of households and 39.2% of the population. In urban areas, the middle class amounts to 50.1% and 47.0% respectively of households and population while in rural areas 28.1% of households and 26.0% of people<sup>21</sup> are determined to belong to the middle class.

A wide income gap persists between urban and rural areas in Mexico. While nearly half of all urban residents are members of the middle class, only slightly more than a quarter of Mexico's rural residents enjoy this distinction. Although pockets of poverty persist in parts of many major Mexican metropolises, the worst poverty in the country is still found in the hills of southern states such as Guerrero, Oaxaca, and Chiapas.

The economic and cultural prosperity of the Mexican population is impacted by a number of socio-economic and geographic factors. Where you live in Mexico, in an urban or rural location, can determine the access you have to education and employment opportunities. Eighty per cent of Mexico's poor are located in rural areas and many are part of indigenous communities. Mexico's indigenous population numbers 12.7 million people representing 13 per cent of the national population, speaking more than 60 languages, the majority of the indigenous population is concentrated in the southern and south-central region of Mexico. Almost 80 per cent of those who speak an indigenous language live in eight of Mexico's 31 states. Speakers of indigenous languages fall way below the Mexican average on almost any socio-economic indicator. For instance, almost 33% of indigenous-speakers are illiterate, compared to a national rate of 9.5%. The exact proportion is hard to calculate but it is estimated that 6% of Mexican population speaks only an indigenous language. This group with little access to Spanish education are unlikely to be reached by the government's English programme and priorities basic literacy and numeracy above learning an additional language.

Many of the stakeholders that took part in our interviews commented that proximity to the United States is a significant factor that has an effect on English language levels in Mexico. The geography of Mexico was described as having a profound effect on levels of English, dividing the country to form three stripes; the northern states that border the US that have a strong tradition of English learning levels and a legacy of developed public English programmes prior to the NEPBE; the central region that comprises the largest proportion of the Mexican population's middle class that by and large do use English in their daily working lives; and the states that join Mexico to Central America where there is much less need for English and, therefore, proficiency declines. Much of the foreign investment in Mexico that has been widely reported in the global media is actually contained within certain areas of different states so has yet to affect the lives of the majority of Mexicans.

---

<sup>21</sup> INEGI, *Boletín de Investigación* num 256/13, 'Clases Medias en México', 12 de Junio de 2013

## Migration

The 39% of research participants that had not previously studied English were asked to indicate what may lead them to learn the language in the future. Of this segment only 3% indicated the opportunity to emigrate overseas would motivate them to learn English. In a 2013, report titled 'Think Regionally to Compete Globally', written by the Migration and Policy Institute of the Wilson Centre, explores how migration in the past has been the basis of the relationship between Mexico and the United States, and increasingly Mexico and much of the Latin American region. This pattern has provided a lens through which all other aspects of the region's relationships are viewed, and the report says the impact of future migration is essential to understand with regards to how the region's long term economic development and prosperity, social order and security and in many ways its competitiveness in the global economy will be defined.

The report sets out to challenge the assumption that Mexico will continue to send an endless supply of less-educated workers to take up poorly paid jobs in the United States. While there is high demand for English in vulnerable communities, in part to provide skills for possible migration to the United States, the report explains that the growth in the Mexican middle class, strong economic recovery since 2008, more stable political conditions and considerable foreign investment have led to many more young Mexicans to attain high levels of education and seek employment opportunities at home. The report claims that as a result, the number of emigrants from Mexico has fallen by more than two thirds since the mid 2000s. Conversely, a new trend has been reported that may change the US – Mexico relationship dynamic. Young American-born Mexicans are beginning to return to Mexico, the number rising to 1.4 million for the period from 2005 to 2010, which is twice that of the previous decade. Commonly with both Spanish and English language skills, this group of youngsters are view as highly skilled and can more easily find jobs in Mexico than in the US.

## Teachers of English

Government stakeholders from the Secretariat of Public Education that took part in this study viewed lack of teaching staff, both current and future teachers in the pipeline coming from Mexican universities, as the greatest challenge to Mexican education and the success of the NEPBE. They held the belief that students are interested in learning English, the teaching materials are adequate and cost is minimal and even in most cases free, but there is a lack of adequate teachers. The distribution of the federal teaching budget has recently come under close and revealing scrutiny. The 2013 Professional Teaching Service Act showed the level of determination from the government to shake up the teaching profession. Government officials also told us that the Vice Ministry of Education Training had recently been given autonomous status illustrative of the increasing importance being placed on teaching in Mexico.

## The influence of media and culture on attitudes towards English learning

Research participants that indicated their English reading or speaking skills were either advanced or fluent indicated that this was because they used Internet and social media in English (18%), they watched English films and television programmes (30%), spoke English with their friends (18%) and listened to English music (17%). English language media and entertainment proliferates across Mexico, with many English-language television channels and films shown with Spanish subtitles. Access to the Internet, social media and digital technology is growing at a considerable rate, giving Mexicans access to much of the same information available anywhere else in the world. This huge exposure to international culture, particularly from the United States has a profound impact on attitudes and therefore interaction with learning English. Our data suggests that increased interaction with television, film, music and social media is having a positive effect on levels of English proficiency in Mexico, however there are both positive and negative associations with learning English, as there are positive and negative associations with the United States.

More than any other language, English in Mexico cannot be detached from its original cultural context. It is not neutral. In Mexico, English is synonymous with the United States. The US is the most important economic, political and military neighbour with a common border of over 3000 kilometres. To some, the United States is the home of many direct relatives and a place that represents prosperity and opportunity to travel, study or work. Our data shows that on average 11.5% of survey participants view English learning as an opportunity learn American English and attain greater affiliation with their neighbour. A far smaller proportion, roughly 7%, expressed an interest in learning British English. To others, the US can represent a source of social discrimination in an imbalanced relationship displaying unfair power dynamics that prevent Mexico reaching its full potential. The introduction of the NEPBE has for the first time shown the government commitment to English. Bilingualism is not being promoted in Mexico as in many other Latin American countries.

Although frequently exposed to using English through US culture, international media, music, film and television, many stakeholders commented that significant numbers of middle class Mexicans live in adequate comfort with access to education, healthcare and job opportunities with relatively little need to use English in their daily lives. Many said that, although young Mexicans are culturally submerged in an English speaking environment, they use the language only as needed in order to use technology, software and online resources. One stakeholder commented that the majority of middle class Mexico is not exposed in their daily environment to situations that demand high levels of English proficiency. Culturally, those exposed to English most frequently are the wealthy, globally-mobile elite and the lower classes of Mexicans that work in the service or retail sectors and aspire to migration to the United States.

Young Mexicans have a varied attitude towards US culture and the use of the English language that is structured around their personal interaction with not only media and culture but their language learning journey and the perceived benefits they gain or opportunities this skill presents. Some embrace it because of its positive significance and the access it gives them to popular culture, some feel a sense of imposition that they must become proficient in English to access certain prestigious opportunities, for example study abroad, others experience a disconnect between why they are learning English and the pathway their future lives will take. These students learn during mandatory school classes but do not practice or retain what they have learned as their daily personal and working lives do not necessitate its use.

## Exposure to English and the learning environment

Many attitudes we possess as individuals are acquired from influential figures in our learning environment. The perception held by learners of English in Mexico may be significantly influenced by how they are first exposed to the language. This can have a profound effect on their motivations to learn and later achieve proficiency. Exposure to English-language films, television and music are as we have seen an important factor. In areas of Mexico where there are considerable numbers of tourists there is greater exposure to English and therefore greater drive to learn. Our research shows that early stage learning during basic education is the greatest motivation to learn English (65%). Teachers are therefore a vital resource that must be well trained and have a strong grasp of the language. The SEP's comprehensive guidelines for English teaching approach contained within the national programme aim to embed and preserve the use of English in social life. However the ideal profile of teachers in Mexico is a long way from being achieved as many teachers have no language training and at a basic level have only achieved the one level of English above the level they are expected to teach.

Parents also play a vital role in creating a positive learning environment and in August 2013, a programme called *Mejora tu Escuela*, or 'Improve Your School' was launched in Mexico that acknowledged greater involvement from parents was needed in Mexican schools. The programme involves a digital platform through which parents are given a greater opportunity for involvement in transforming the system which educates their children. The project covers all public and private schools from elementary to high school level and the digital platform has four main tools: (1) 'Know your school' which lets people search for a school by name or geographic location and reveals the quality of education as well as a state ranking (2) 'Compare your school' which allows comparisons with other schools by educational quality, state and national ranking, performance over time and performance of students (3) 'Grade your school' which invites the community to shed light on the strengths and weaknesses of each school and (4) 'Improve your school' which provides concrete tools and suggestions to parents on how to participate in addressing problems in their child's school. Within weeks of launch the platform had over a million page views and 2500 people had commented.

# Opportunities in Mexico

With younger Mexicans achieving higher levels of education than previous generations and a sharp increase in foreign direct investment, Mexico's interest to lift overall English levels is keen and that sentiment is reflected in the country's learning environment. Opportunities can be found in areas in need of improvement, such as the need to recruit and train more English language teachers, as well as in industries earmarked for growth. In the latter, English language skills will become increasingly more closely aligned with employability, and this could be coupled with interest in corporate support for English language learning:

- A considerable market for English teaching and learning has been created by the development and implementation of the National English Programme in Basic Education, which to fulfil its ambition for national coverage requires over 80,000 additional English teachers
- Forty-three per cent of our survey population said they had studied English as they needed to acquire English skills for university. Our research investigation and analysis showed that a considerable number of Mexican higher education institutions now require graduates to attain an English qualification before they are allowed to graduate from university
- Learning American English was seen as slightly more attractive than British English, and this trend was more apparent within younger generations
- Fifty-one per cent of the total employer survey sample said their company offered English language training and development for existing staff or new staff. Thirty per cent said they had a training partnership with a private external company, 18 per cent said they provided funding for English tutoring, 16 per cent had internal provision and 14 per cent said they offered online training
- The Mexican National Infrastructure Programme aims to attract foreign investment from public-private partnerships (PPPs), worth in excess of US\$100 billion, in the areas of value-added logistics and transportation and services sectors, that will require skilled English language speaking personnel

# In conclusion

The National English Programme in Basic Education, launched in 2009, is not yet mature enough to be properly assessed and measured against its central aim to teach English in pre-primary and secondary school throughout the Mexican public education system. The programme was developed to prepare Mexican school students for contemporary society that demands citizens with the necessary competencies to face and incorporate into a globalised, constantly-changing world. The Mexican government believe that through basic education they have the responsibility to provide students with the opportunity to develop these competencies. English language teaching and learning is now prominently on the Mexican government agenda. The introduction of the programme acts as acknowledgement of the need to develop adequate human capital to satisfy ambitious national infrastructure development goals. Long term success of the policy will depend on a number of new and existing economic, social and cultural factors that have been described in this study.

The perception that English contributes to national and personal economic growth, and has a significant role to play in Mexico's economic future and global competitiveness will create an environment where learning English is highly valued as a skill for future employment. The need to speak English to progress and attain higher levels of education can frame learning English as an obstacle rather than an opportunity, and the complex and unequal development of Mexican society can reinforce the notion that there is no substantial need for the majority of Mexicans to learn the language.

English teaching, the re-definition of the teaching profession as well as its development and evaluation will play a significant role in the success of the national English programme. The influence of media and culture on attitudes towards English learning is strong, as are the role models that English learners are first exposed to and the learning environment that they experience on a daily basis.

The perception of English in Mexico is shifting. It is becoming perceived less as a currency that can provide a chance to seek better opportunities outside the country's borders, and more as a skill needed so that Mexico can trade and engage with the wider international community, and conversely so the international community can invest in Mexico. Together each of the factors described allow us to understand more fully the English language learning environment in Mexico and help us begin to identify where future demand for language learning will arise.