

## English in Peru

An examination of policy, perceptions  
and influencing factors



May 2015

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# Introduction

The third-largest country in South America, Peru is home to varied habitats that provide a wealth of biodiversity. The 19th and early 20th centuries were characterised by immigration, and groups of Peruvians of with Chinese and Japanese descent remain influential today. In the 1980s, the trend turned more towards emigration, reflecting the effects of an economic crisis and political conflict between the state and guerrilla groups. Improved economic conditions have stemmed the outflow, but while the poverty rate has dropped substantially over the last decade, over a quarter of the population remains economically vulnerable. Foreign investors are showing increasing interest in Peru's mineral wealth, and the country's efforts to boost English levels reflect its goal of expanding and internationalising the economy further.

# Methodology

## Phase 1

### Desk research and secondary data collection

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In Phase 1 we worked with local language analysts to compile extensive background information on the local education and policy environment. An audit of secondary data sources framed the structure and design of primary data collection in Phase 2.

## Phase 2

### Quantitative primary data collection

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

- an online survey of 1,002 people from the general population, most of whom were aged 16-35
- an online survey of 137 Peruvian employers varying in size from 10 to over 1,000 employees, with the sample taken from managerial and executive staff

## Phase 3

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

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

#### Interviews

##### Government

- British Ambassador to Peru
- English Specialist, Department of Secondary Education, Ministry of Education (MINEDU), Lima
- Deputy Minister of Pedagogy, MINEDU, Lima
- Director of Basic Education, MINEDU, Lima
- Director of Secondary Education, MINEDU, Lima
- Cabinet Advisor, MINEDU, Lima
- Director of High-performance Schools, MINEDU, Lima
- Director of Higher Education Pedagogy, MINEDU, Lima
- Director of Higher, Technical and Professional Education, MINEDU, Lima
- Director of Intercultural, Rural and Bilingual Education, MINEDU, Lima
- Director, National Education Scholarship Programme (PRONABEC), Lima
- Director, Regional English Language Office (RELO), US Embassy, Lima
- Director, Regional English Language Office (RELO), Lima

##### Education institutions

- Academic Coordinator, Language Centre, Universidad del Pacifico, Lima
- Senior Teacher, English for Specific Purposes (ESP), Universidad del Pacifico, Lima
- Vice Executive Director, Idiomas Católica, Pontificia Universidad Católica del Perú (PUCP), Lima
- Academic Coordinator, Idiomas Católica, PUCP, Lima
- International Vice Chancellor, Universidad San Ignacio de Loyola (USIL), Lima
- Director General, Department of Languages and Bilingual Training, USIL, Lima
- Director of Academic Quality, Teaching and Curriculum, USIL, Lima
- Vice Chancellor of Research, USIL, Lima
- Education Specialist, USIL, Lima
- Research Coordinator, USIL, Lima
- Director, Centre for Research, USIL, Lima
- Academic Coordinator/Supervisor, Language Centre, Universidad Ricardo Palma, Lima

### Education professionals

- Marketing Manager, Instituto EIGER, Lima
- Academic Coordinator, Euroidiomas, Lima
- Deputy General Manager, Langrow, Lima
- Teacher Training Consultant, Camelot Language Centre, Lima
- Director, Colegio Peruano Británico, Lima
- Country Director, British Council Peru, Lima

### Human resources and recruitment professionals

- General Manager, Laborum, Lima

### Professional associations

- President, International Association of Teachers of English as a Foreign Language, Lima

# Key findings

- While quality varies, Peru has achieved near-universal primary education and expanded secondary education without increasing the education budget substantially; this has been achieved in part through the expanding private education sector
- Social inclusion is a priority; multiethnic indigenous communities tend to have less access to schools and teachers, resulting in educational and socio-economic inequality
- Improving access to and the quality of education is the main goal of the Ministry of Education (*Ministerio de Educación del Perú*, MINEDU)
- Historically, incorporating indigenous languages has been prioritised over English language learning
- In 2014, President Ollanta Humala announced that bilingual education was a priority and set the goal of achieving bilingualism, with English as the priority language, by 2021; funding has been allocated to meet this goal
- Initial aims of English language reform include more resources, increasing English lesson time in public schools and prioritising teacher training and professional development through online and face-to-face training in Peru as well as in English-speaking countries
- MINEDU signed a memorandum of understanding (MoU) in late 2014 with the UK for technical assistance with its English language programme
- *Programa Nacional de Becas y Crédito Educativo* (PRONABEC) - the continuing education and scholarship arm of MINEDU - grants scholarships to qualifying students and teachers for overseas study
- Most Peruvian English learners studied English in secondary school (57%), while 46 per cent learned during undergraduate study and 41 per cent attended private language schools; education is also a major motivating factor for language learning: 44 per cent learned English because it was mandatory in secondary school and 40 per cent learned because they needed it for university
- The biggest barriers to English language learning are cost and time
- English learners and non-learners agree that English is a tool for improving employability, and 81 per cent of non-learners could be motivated to learn the language if it increased their employment prospects; English learners are also likely to value English as a tool for communication
- Fewer than one in five employers in our survey (17%) offered English language training and development opportunities
- More than three quarters of surveyed employers (78%) believe that English is an essential skill for managerial staff, while a similar share (77%) feel that English is essential for Peru's growth and progress



# Education macro analysis

Peru has experienced periods of significant economic and political change since independence in 1821, and education policy has evolved against a backdrop of political instability. After the military dictatorship ended in 1980, successive democratically elected governments failed to pull the country out of economic turmoil, deepening social tensions, or address the threat posed by the Shining Path guerrilla group. From 1990, Alberto Fujimori's government adopted neoliberal economic policies that led to growth; however, the country also moved away from democracy during this period, and democratic rule was only restored with the election of Alejandro Toledo in 2001, following a period of transitional government. Alan García was president from 2006 to 2011. Toledo ran on a platform of social equality, and social inclusion is the main objective of the current president, Ollanta Humala, who came into power in 2011.

## Education law and governance

Free and universal primary and secondary education first became institutionalised in the mid-1850s, and the national government took charge of education financing at the turn of the century. In 1941, a new law (*Ley Orgánica de Educación*) guaranteed free and compulsory primary education and secondary school became more specialised. The law also stated that Peruvians should learn in Spanish. Sentiment regarding the education of vulnerable or non-Spanish-speaking communities changed in the 1960s, when a reform meant that any community with a school was entitled to a government teacher. In 1970, calls were made for the unification of bilingual (Spanish and indigenous languages) education throughout Peru; this was in response to income inequality and social programmes. By 1972, the government was attempting to better align education output with the needs of industry. This inclusive view continued in the 1980s under the Belaunde and García administrations, although political and economic stability became the main priorities at this time. Non-governmental organisations (NGOs), among others, continued to run programmes for indigenous communities and the promotion of bilingual education. The idea of intercultural rights in education was introduced at this time but was not made part of policy until the late 1990s. In 1995, the Private School Law (*Ley de los Centros Educativos Privados*) was passed, which allowed the government to retain control of private schools. In the same year, the government restated its goals of improving the quality and accessibility of education and began to take a decentralised approach to education administration. In 1997, interculturalism became institutionalised and a standard to be achieved for Peruvian education, and in 2000, the Regulations on Children and Adolescents (*Código de Niños y Adolescentes*) were updated under Law 27337 to ensure children's rights. In 2001, the transitional government brought together 25 representatives from different sectors along with members of the education community to form a think tank designed to influence and advise on policy. In 2002, policies were passed with ambitious goals to increase annual education spending; however, while economic growth took place, restrictions on the education budget remained.

Over 2001-2004, the new government introduced a number of policies on decentralisation, which are discussed in later chapters. The Constitutional Reform Act (*Ley 27680*), which established regional authorities, and the Law on the Bases of Decentralisation (*Ley 27783*), which stated the right to education regardless of personal finances, were created in 2002, when the National Decentralisation Council was also established. Other laws introduced at this time addressed the funding, responsibilities, quality assurance and regulation of education.

When the first PISA results were published in 2003, Peru's poor performance caused much concern and led some to call for a state of emergency in education in Peru. At this time, the General Education Law (*Ley General de Educación*, 28044) was passed, making pre-primary, primary and secondary school mandatory and ensuring government support for and control over standards and common curriculums, which included civics and intercultural relations. This comprehensive policy mirrored a Supreme Court ruling at the time that encouraged inclusive education and social systems. Also passed in 2003 was Law 28123, which mandated education and health support for children under the age of six, assuring that pre-school learning was aligned with primary education.

The 2004-2006 Social Pact of Reciprocal Commitments for Education was recommended by the advisory think tank and had four main goals:

1. to ensure equal responsibility for education quality, particularly in mathematics, values, and language and communication
2. to address teachers' professional development through fair wages and training incentives
3. to increase education budgets to cover all needs, including teacher development
4. to promote ethical practices in public education

In 2006, Law 28740 mandated the creation of the National System for the Evaluation, Accreditation and Certification of Education Quality (*Sistema Nacional de Evaluación, Acreditación y Certificación de la Calidad Educativa*, SINEACE). SINEACE was responsible for the quality of public basic and tertiary education as well as teacher standards.

In response to the 2004-2006 Pact, the National Education Project to 2021 was created, addressing six objectives and overall goals for education, including the provision and use of ICT in basic education.

The current Ministry of Education (*Ministerio de Educación del Perú*, MINEDU) focuses on four main areas:

1. Revaluation of the teaching career
2. Impact on student learning
3. Infrastructure and quality assurance
4. Manage all areas efficiently

## Higher education law and governance

Higher education in Peru comprises both universities and non-university institutions (including teacher training colleges and technical and vocational (TVET) colleges). Public and private universities are autonomous and are regulated under the 1982 General Education Law and the 1983 University Law (*Ley Universitaria*, 23733), which states that universities can establish governance while being funded by the state. University governance is carried out by a university assembly, a university council, a rector and a council as well as a dean of each faculty. In 1995, Law 26439 led to the creation of the National Commission for the Authorisation of University Operations (*Consejo Nacional para la Autorización de Universidades*, CONAFU), which approves and authorises universities. CONAFU operated alongside the National Assembly of Rectors (*Asamblea Nacional de Rectores*, ANR), which managed regulatory issues. In 2014, a new university law was passed, creating the National Superintendence of University Education (SUNEDU)<sup>1</sup> to replace the ANR. SUNEDU will be able to exert authority over universities' licenses and funding as well as degree programmes. This has been met with resistance by students, universities and related businesses as a challenge to university autonomy.<sup>2</sup>

In 1996, Law 882 on the Promotion of Investment in Education was passed, allowing external investment in education, whether for-profit or non-profit. This law included tax breaks for for-profit providers and led to the proliferation of private universities, where quality is largely felt to be lower. As such, between 1996 and 2010, and over 2005-2010 in particular, the higher education sector saw rapid increases in student numbers and a changing balance of enrolments in public and private institutions.

Quality assurance in higher education is the responsibility of both CONAFU, which authorises operations, and the Council for the Assessment, Accreditation and Certification of University Higher Education Quality (CONEAU), which sanctions courses and faculties, as well as individual institutions. This landscape has changed considerably in recent years and is expected to continue to do so. In 2009, Law 29394 was passed to provide national legislation for TVET schools alongside universities and teacher training institutes.

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<sup>1</sup> "Peru approves new university law." *Peru this week*. 27 June, 2014. Retrieved at <http://www.peruthisweek.com/news-peru-approves-new-university-law-103363>.

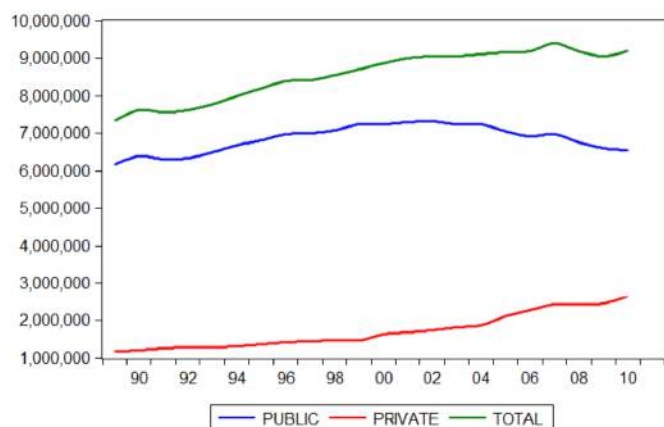
<sup>2</sup> "Peru positioning to be the next big player in Latin America." *ICEF Monitor*. 26 June 2014.

## Education structure

The free and compulsory basic education system comprises pre-school (ages three to five), primary school (ages six to 11) and secondary school (ages 12-17). Lower-secondary students are taught a wide range of mandatory subjects, while upper-secondary study, which is not compulsory, may follow arts, science or technical streams, depending on whether the school is private or public. Peru has made great strides since 1970 in terms of access to education. Primary education is now near universal, while the gross secondary enrolment ratio was 94 per cent in 2013, according to UNESCO, and the gross tertiary enrolment ratio was 40 per cent in 2010. The Inter-American Development Bank reports that these relatively high enrolment rates reflect public and private spending on education, albeit still low by international standards, as well as a focus on enrolment numbers, sometimes at the expense of quality. As such, the public education system is characterised by high coverage comparable to in developed countries but low expenditure per student.

The rapid expansion of private schools allowed the government to make progress towards its goals without raising public spending on education as a percentage of GDP. As such, private schools represent an increasingly large share of the education system. Demand for private schools has increased as a result of quality concerns in the public sector, including frequent teacher strikes in the 1990s, and favourable government policies. Many private schools operate on a for-profit basis and lack supervision or accountability, resulting in varying quality. Private schools have largely proliferated in urban areas, while public schools are the main providers in rural areas. The national curriculum applies to both public and private schools, but both are encouraged to diversify according to context and need.

### Enrollment in all levels



Source: INEI and authors' calculations.

Source: IADB

### School-age population by education level

Pre-primary	1,748,584
Primary	3,492,867
Secondary	2,908,246
Tertiary (ISCED 5A only)	2,861,645

Compulsory education lasts 12 years from age 5 to age 16

Source: UNESCO

*'Between 1990 and 1997, enrolment in private schools grew by 62 per cent in preschool, nine per cent in primary education, 28 per cent in secondary education, and 37 per cent in tertiary non-university education. Growth outpaced the rate of increase at these levels in the public sector, which only rose by 34 per cent in preschool education, eight per cent in primary education, ten per cent in secondary education, and 25 per cent in tertiary non-university education.'*<sup>3</sup>

Private secondary schools include:

- private, self-financed day schools, which constitute the majority of private schools and derive most of their revenue from fees
- cooperatively managed private schools
- schools run by the Catholic Church
- schools run by other religious organisations

TVET schools often offer three-year post-secondary programmes and confer titles as opposed to degrees, while university and teacher training programmes often last five years. Higher education is free in public institutions for students who are unable to pay tuition fees and meet academic admission requirements.

Public universities receive financial support from the government, while private universities rely on sources such as corporate donations and tuition fees for funding. Many universities charge per credit rather than per semester or year. Most of the expansion of the higher education system in recent decades has been in the private sector, although the government has also founded a number of new public universities in recent years.<sup>4</sup> Undergraduate programmes usually comprise two years of general study followed by three years of specialisation. Around 60 per cent of postgraduate courses are public and the majority of these programmes confer master's degrees, often in fields such as business and education. Of the one in four universities that offer doctoral degrees, most are in located in the capital, Lima.

The proliferation of private universities has brought about a number of changes in the higher education system. Firstly, public universities have developed income-generating activities, such as pre-university education, graduate education, language institutes and consulting services, to allow them to finance university programmes. Secondly, poor standards and a lack of quality provision have led some private universities to modify their focus: to remain competitive, institutions are emphasising subjects that are more closely aligned to the workplace and courses that teach skills that relate directly to employability. As such, there is now less focus on subjects related to innovation and creative thinking. Lastly, a system of universal accreditation has been introduced to increase higher education quality.

The World Bank reports that Peru has one of the least affordable tertiary education systems in Latin America and compared to developed countries.<sup>5</sup> While this finding is based largely on responses from private universities, it still reflects the high cost of tuition and living expenses and the lack of access to financial assistance. As such, both affordability and accessibility are barriers to higher education in Peru. Conversely, there are no significant gender gaps in access to higher education.

<sup>3</sup> Mesones, Jorge A., Jorge R. Peschiera Cassinelli, and Jorge F. Baca Campodónico. "The Impact of Public Expenditures in Education, Health, and Infrastructure on Economic Growth and Income Distribution in Peru." IDB Working Paper Series. Feb 2014.

<sup>4</sup> De Wit, Hans, ed. "Higher education in Latin America: The international dimension." World Bank Publications. 2005.

<sup>5</sup> Murakami, Yuki, and Andreas Blom. "Accessibility and affordability of tertiary education in Brazil, Colombia, Mexico and Peru within a global context." World Bank Policy Research Working Paper Series. 2008.

## Multiculturalism in Peru

The Peruvian population is multi-ethnic and includes Amerindians, Europeans, Africans and Asians. These groups are spread across diverse geographical regions and speak a wide range of languages and dialects. While some of these groups use traditional indigenous languages, others have adopted Spanish completely. Under the 1993 Constitution, the official languages of Peru are Spanish and Amerindian languages such as Quechua and Aymara in areas where they predominate. Spanish is spoken by 84 per cent of the population, while 13 per cent speaks Quechua, which became an official language in 1975.

As in many countries, indigenous communities in Peru and those that communicate in non-official languages tend to have comparatively low access to schools and teachers, resulting in educational inequalities. As a lack of access to education from an early age is linked to gaps in achievement throughout academic and professional life, social inclusion for vulnerable communities and language groups is a government priority. Intercultural communication and education have been central to education reform since the 1980s. In 1997, interculturality was introduced as a basic principle of the education system, with the intention to strengthen not only vulnerable groups but also the democratic state. Although progress has been made, social inequalities and inclusion remain significant issues.

## Decentralisation policies

While the prevailing belief is that the national government should be responsible for social inclusion and equality, Peru began to move towards decentralisation in the 1990s. By decentralising the system, the government aimed to give parents more power, ensure greater transparency and promote the participation of public and civil society in education. Peru launched a major decentralisation programme in 2002, including enacting laws 27680 and 27783 (discussed above). Decentralisation policy was organised around three levels of government: national, regional and local. As such, decentralisation is fairly recent. The transfer of political, economic and administrative authority has been gradual and is managed by the National Decentralisation Council.

Decentralisation has had varying success. NGOs have played an important role in the decentralisation process and still influence local politics. However, in many ways the process has been fairly nominal; for example, in education, power was already devolved from MINEDU to its regional and local education management units (LEMU). While some transfers to regional governments took place, much continued as before.<sup>6</sup> Decentralisation efforts were renewed in 2006 under the new government's planned 'decentralisation shock'. In reality, the plan involved numerous pilot projects followed by slow roll-outs, meaning that the impact was less dramatic than anticipated. Nevertheless, in education at least, governance policy remained focused on local-level management, and MINEDU's responsibilities were in strategy, evaluation and supervision. Due to a lack of clarity, training and responsiveness, as well as transparency in some cases, local managers are not always best skilled or placed to implement education policy and programmes. Funding is also an issue, as the decentralisation of power has not gone hand in hand with the decentralisation of funding and resources.<sup>7</sup>

The following table illustrates the significant shifts in spending over 2004-2008, broken down by governance level.

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<sup>6</sup> Martínez-Vázquez, Jorge. "Fiscal Decentralization in Peru: A Perspective on Recent Developments and Future Challenges." *International Center for Public Policy*. Nov 2013.

<sup>7</sup> "Peru: The Decentralization Process and Its Links with Public Expenditure Efficiency." *World Bank*. June 2010.

*Public spending by function and level of government, 2004 and 2008*

Per cent of spending in a given function accounted for by different levels of government						
	2004			2008		
	Central	Regional	Local	Central	Regional	Local
Administration and planning	81	2	17	73	4	23
Agriculture	63	30	7	36	35	29
Communications	99	1	–	99	1	–
Defense and national security	100	–	–	99	1	–
Education and culture	41	55	4	37	53	11
Energy and mining	70	12	18	87	6	7
Fisheries	74	23	3	61	27	13
Foreign affairs	100	–	–	100	–	–
Health and sanitation	56	27	17	47	29	24
Industry, communications and services	51	9	40	37	8	55
Justice	100	–	–	100	–	–
Labour	95	5	–	93	7	–
Legislative	100	–	–	100	–	–
Social protection	77	12	11	74	13	13
Transportation	54	13	32	39	15	46
Urban development and housing	31	6	63	47	3	50
<b>Total</b>	<b>72</b>	<b>16</b>	<b>12</b>	<b>64</b>	<b>18</b>	<b>18</b>

Source: World Bank

Decentralisation became a major topic again in 2009, when responsibility for regional education and teacher salaries was given to regional entities, often without the associated resources or capacity-building measures. In 2014, arrangements were made to begin the transfer of education funds to the regional level and enhanced quality assurance mechanisms were put in place, and many are optimistic about the current efforts.

## Teacher training initiatives

Trainee teachers largely attend pedagogical institutes, which offer five-year teacher training programmes. Universities also train teachers and often contribute to school professional development programmes, such as summer courses and workshops. The certification issued by teacher training colleges is the *título* professional, which is distinct from a university degree and can be topped up to degree level. It is possible for professionals with degrees in areas other than education to teach in areas related to their specialty; however, they will only be placed on teacher pay scales if they acquire a teaching degree or postgraduate degree in education.

There are roughly 400,000 teachers in Peru. Today, the teaching profession is given little respect and is seen as being easy to enter. However, this hasn't always been the case, and teaching is slowly recovering its professional status. Laws passed in 1984 and 1990 required teachers who are full public servants to hold a professional teaching degree, and the proportion of unqualified teachers fell from a high of 49 per cent in 1988 to eight per cent in 2005. The 1990 Teachers' Law (*Ley del Profesorado*) also created a special category for teachers, meaning that tenured public school teachers have a secure job and access to social benefits. This law was heavily promoted by the teachers' union, *Sindicato Unitario de Trabajadores en la Educación del Perú* (SUTEP). SUTEP has played an important role in the teacher training landscape and has shaped policy and outcomes, particularly in the 1970s and 1980s, when the union was very active through strikes and the government was equally active in its responses. The union has close links with politics and its ideology often attracts students. Each year, SUTEP customarily provides the government with a list of its demands (*Pliego de Reclamos*) with regard to work conditions, income, professional development and education policy.

In the early 1990s, a teacher shortage emerged, prompting a policy in 1993 that allowed temporary, non-tenured teachers to teach in public schools. These teachers earned similar wages but did not enjoy the benefits of tenured teachers. Public school teachers tend to receive lower wages than those in the private sector or at pedagogical institutes.

In 2000, the *Mejoramiento de la Calidad de la Educación Peruana* (MECEP), which aimed to improve education quality, began to address teacher training, and in 2001, a new law on the public teaching career (*Carrera Pública Magisterial Ley 29062*) was enacted, which aimed to make teacher training colleges more efficient and introduce continuous education. From this time up to 2006, the approach to teacher development was divided between the promise of higher salaries and the promotion of self-development, making teachers responsible for their continued education and making evaluation a condition of employment. These ideas were outlined in the Social Pact of Reciprocal Commitments for Education (2004-2006). This approach resulted in frequent strikes, and SUTEP demands and limited implementation meant that little changed in reality over this period.

In 2007, the government introduced a law requiring teachers to sit competency tests; teachers who failed two tests in a row were required to undergo training, and if they failed a third test, they would lose their jobs.<sup>8</sup> This move resulted in a protracted battle with SUTEP, which also demanded that the government increase education spending to six per cent of GDP and give teachers access to in-service training. By 2012, education spending had risen nominally to 2.8 per cent of GDP, which is lower than in any other upper-middle-income country in Latin America; however, in 2014, education spending reportedly increased by a further 0.5 per cent of GDP.<sup>9</sup> Peru also spends a much lower percentage of total education expenditure on teacher salaries than similar countries in the region.<sup>10</sup>

Concerns have been raised about the quality of teacher training institutes in recent years, particularly as private higher pedagogical institutes (ISPs) have proliferated. In-service teacher training is the responsibility of MINEDU, which coordinates provision through third parties. The National In-Service Training Programme (PNFS) was created in 2002 to set minimum requirements for providers, which include private and public ISPs and universities, NGOs, private basic education institutions and preparatory academies. Critics of the scheme cite the for-profit nature of most of these institutions and the lack of a regulatory body.<sup>11</sup>

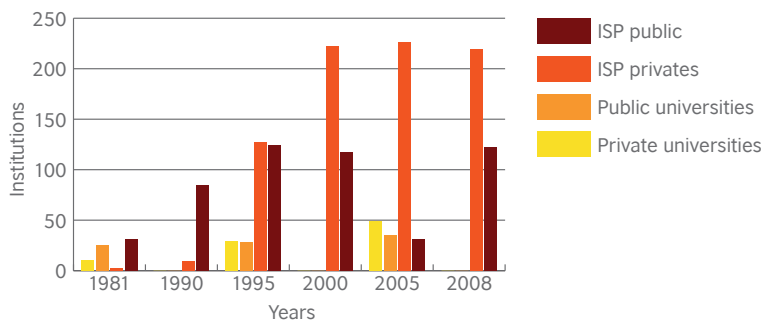
<sup>8</sup> "Teachers protest over the government's new education law." Peru Support Group. 31 July 2007. Retrieved from <http://www.perusupportgroup.org.uk/article-150.html>.

<sup>9</sup> "Latin American Economic Outlook 2015: Education, Skills and Innovation for Development." OECD, Development Bank of Latin America (CAF), United Nations Economic Commission for Latin America and the Caribbean. 2014.

<sup>10</sup> World Bank Education Indicators Database

<sup>11</sup> "Teacher training in Latin America." Education International. Retrieved at [http://www.ei-ie-al.org/publicaciones/formacion-ing\\_web.pdf](http://www.ei-ie-al.org/publicaciones/formacion-ing_web.pdf)

### Teacher training institutions by type and ownership (1981 - 2008)



Source: Education International

In 2009, the Law on Higher Education Institutes and Schools (Ley de Institutos y Escuelas de Educación Superior, 29394) was enacted to regulate the creation and operation of higher education institutions, including ISPs. As such, MINEDU oversees ISPs, including designing a national curriculum for these institutions. However, universities may also have education faculties that are autonomous and can design their own curriculums. In 2012, the Ley de Reforma Magisterial (LRM) was enacted, establishing a single regulatory framework to govern the teaching profession as a meritocratic system through open, transparent evaluation processes.

### Quality of education

Education quality is a concern in Peru, which ranked 136th out of 144 countries for primary education in the 2014 Global Competitiveness Report and similarly poorly for mathematics and science education and higher education and training. Peru also placed last out of 65 countries in the OECD's 2012 PISA rankings, which compare the performance of secondary students in mathematics, reading and science and in which Peruvian students from vulnerable backgrounds achieve the lowest scores.

Addressing these issues is a priority for the government, and Peru is making progress towards accreditation and quality assurance through the Quality Measurement Unit, which was founded in 1966 and is responsible for evaluating numeracy and literacy skills and bolstering public opinion of education. SINEACE also works in a number of ways to accredit all levels of education. The government has put in place a national assessment system from Grade 2, the results of which are shared with parents and institutions. While the data is not yet compiled or used at the national level, it reportedly shows improvements in learning outcomes in recent years.

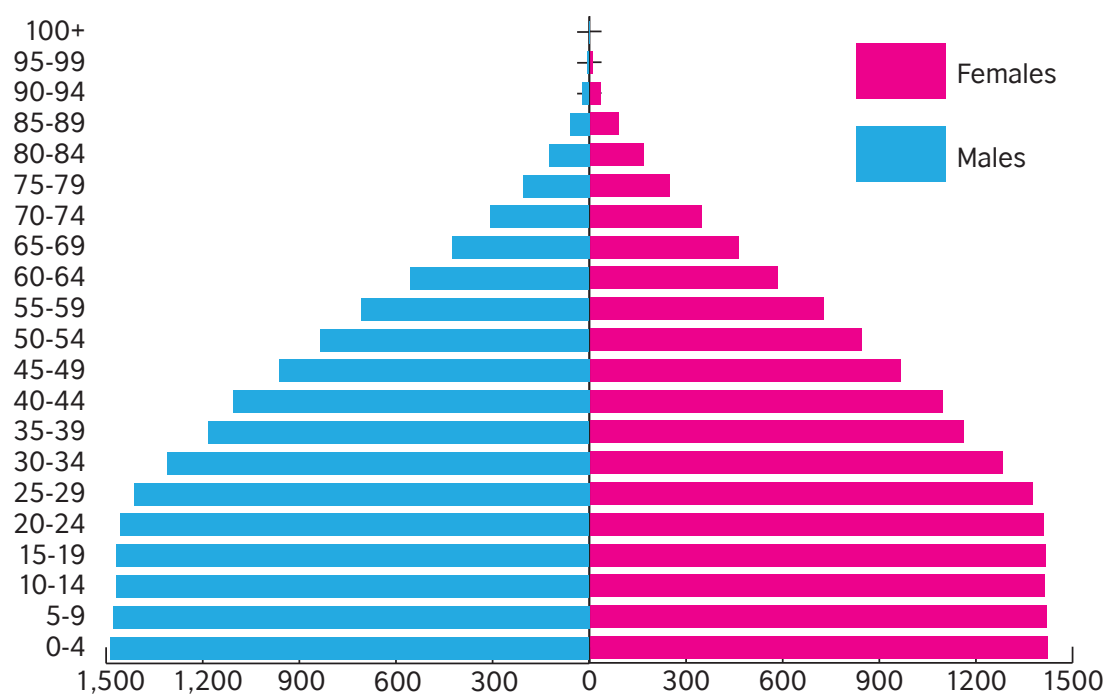


## Education indicators

### Population

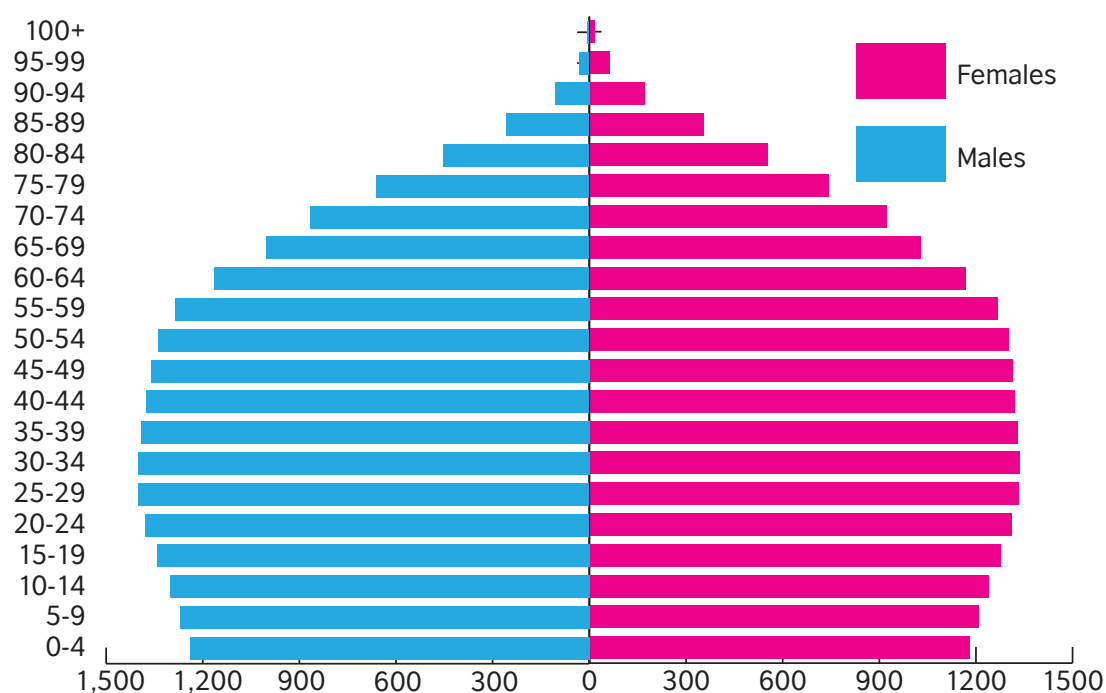
In 2013, the population of Peru was estimated at 30.4 million and grew by 1.3 per cent on the previous year. In this year, 28.8 per cent of the population was aged 0-14, and the population is ageing steadily: those aged over 60 are soon expected to outnumber those aged below 15.

### *Population pyramid, 2020*



Source: United Nations Population Division, 2014

### Population pyramid, 2050

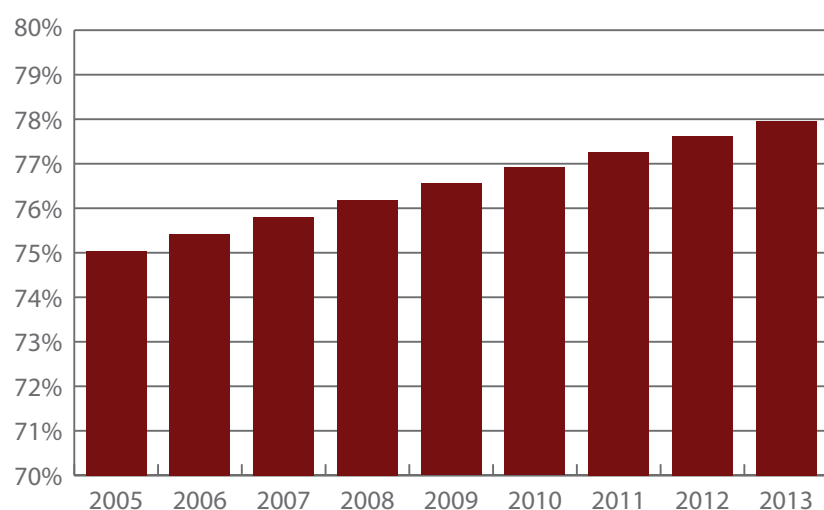


Source: United Nations Population Division, 2014

As the population is ageing, improving labour force productivity is a priority. The government aims to ensure that young Peruvians have access to the high-quality education needed to help them succeed in the job market, which is becoming increasingly competitive as skilled young Peruvians enter the market and older employees hold down formal, senior positions for longer periods of time.

The proportion of the population living in urban areas rose from almost 69 per cent in 1990 to 78 per cent in 2012, and urbanisation is increasing at a rate of around 1.5 per cent annually.

### Urban population (% of total)



Source: World Bank

In 2010, nearly 43 per cent of the urban population lived in Lima, Peru's capital and largest city. The wider Lima metropolitan area was home to around 8.5 million people at the last census, in 2007, and this figure is believed to have reached around ten million today, making Lima one of the largest cities in Latin America. No other Peruvian cities have populations exceeding one million, although Arequipa in the south and Trujillo in the north had over 750,000 inhabitants at the last census.

Private schools have proliferated largely in urban areas, meaning that children in rural areas mostly attend public schools, where quality varies and there may be a shortage of teachers, resulting in one teacher teaching several grades together. However, public primary education is widely available and the majority of the population has completed this level. Secondary enrolment is much lower in rural areas. The National Educational Project reports that only 16 per cent of rural students study beyond the age of 16 and 25 per cent of rural villages lack secondary school provision. Education coverage expanded quickly in Peru, and as trained teachers are in short supply, quality remains low.

### Public spending on education

In 2012, education spending rose slightly to 2.8 per cent of GDP; this proportion is the same as in 2003 and is lower than in any other upper-middle-income country in Latin America. The government has pledged to increase spending by 0.5 per cent of GDP annually to six per cent of GDP by 2021, and in 2015, the government almost doubled the education budget.

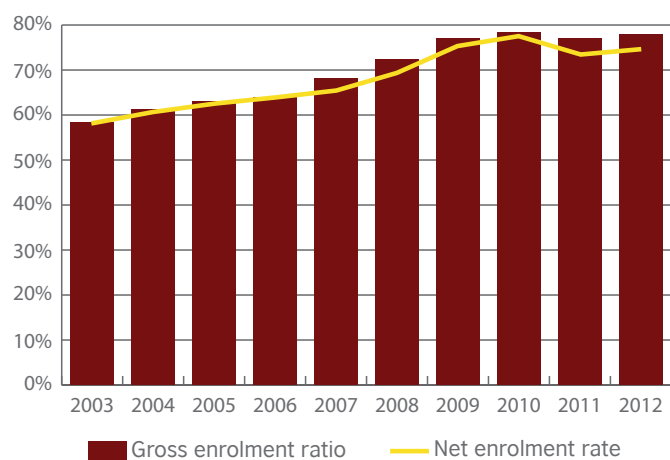
### Education expenditures

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
<b>Government expenditure on education</b>										
% of GDP	2.8	2.8	2.7	2.5	2.5	2.7	2.9	2.7	2.5	2.8
% of total government expenditure	14.7	15.3	14.3	14	14.1	14.5	14.6	13.5	13.4	14.4
<b>Government expenditure per student (in PPP\$)</b>										
Primary education	356.4	407.4	418	500.2	558.9	686.5	773.1	779.7	798.9	937.9
Secondary education	537.7	587.4	608.6	696.1	748.8	834.4	912.7	950	898.6	1087.6
Tertiary education	656.9	700.7	566.1	754.2	-	-	-	842.9	-	-

Source: World Bank

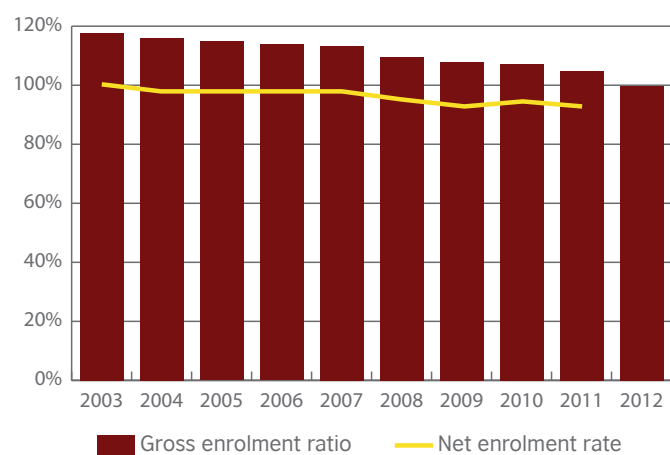
## School enrolment rates

### Pre-primary enrolment



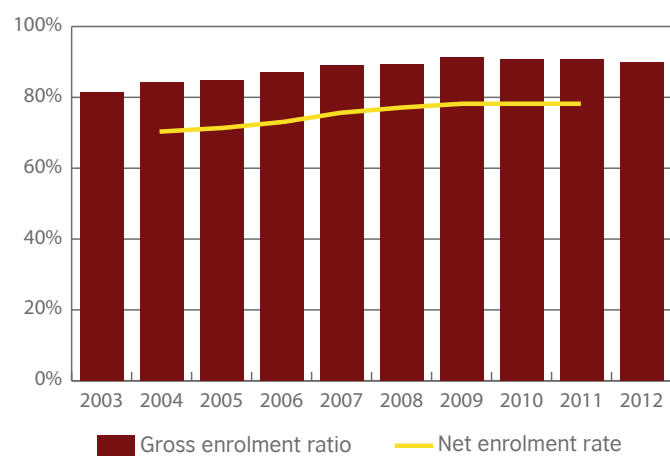
Source: UNESCO

### Primary enrolment



Source: UNESCO

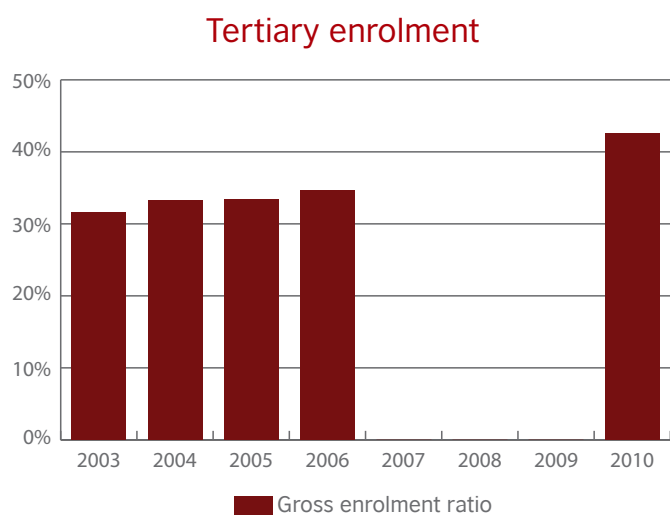
### Secondary enrolment



Source: UNESCO

Access to primary education is near universal, with a net enrolment rate of 94-97 per cent; pre-school enrolment (ages three to five) has tripled over the past five years to 74 per cent, and at almost 80 per cent, the secondary net enrolment rate is above the regional average. Net enrolment has fallen slightly at the primary level but continues to rise at the pre-primary and secondary levels.

## Tertiary enrolment rates



Source: UNESCO

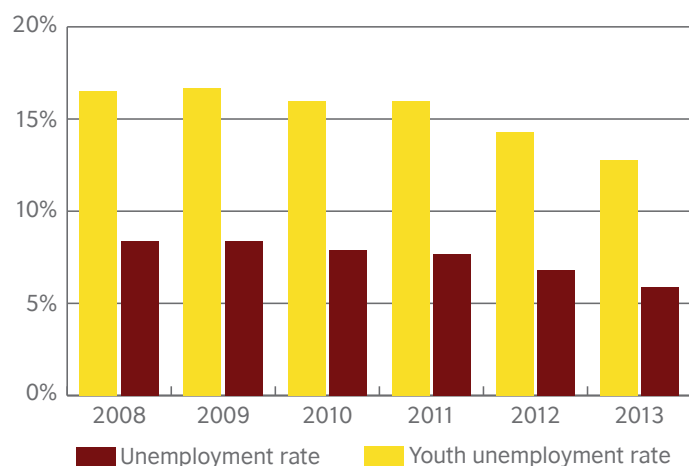
Data missing from 2007-2009

Enrolment in tertiary education has risen significantly in recent years from around 35 per cent in 2006 to almost 43 per cent in 2010. As Peru's economic growth has slowed, public universities have experienced substantial cuts in public funding; however, enrolment has continued to increase nonetheless.<sup>12</sup> Entry to higher education is via the high school diploma as well as entrance exams, if applicable. However, around half of the candidates for university admission exams each year fail, reflecting the poor quality of secondary education and the difficulty of the exams. Acceptance rates to public universities are much lower than for private institutions, although public universities are preferred because of the low fees and prestige associated with the country's oldest institutions.

<sup>12</sup> Ortiz, Diego M. "Peruvian universities face huge budget cuts." *Peru this week*. 16 July 2013.

## Youth employment

### *Total unemployment rate and youth unemployment rate, 2008-2013 (% of economically active population, % of economically active population aged 15-24)*



Source: Euromonitor International from International Labour Organisation (ILO)/national statistics

The ILO estimates that youth unemployment was 8.7 per cent for males and 9.1 per cent for females in 2013; these rates are high compared to the total unemployment rate of 3.9 per cent. There are also considerable regional variations in total unemployment, with rates around double the national average in some areas. Unemployment could be higher considering that many young Peruvians, along with much of the total labour force, work in the informal sector, where job security and benefits are lower. Youth unemployment fell from 2008 to 2013, suggesting that economic growth has enabled job creation and that Peru does not have a surplus of graduates. While unemployment is falling overall, there is a shortage of skilled workers: in 2013, 12.1 per cent of the population aged 15 or over had attained higher education; this is up from 11.4 per cent in 2008 and is slightly below the Latin American average of 12.8 per cent.

In 2011, President Humala announced the *Jóvenes a la Obra* (Youth Get to Work) programme, which aims to encourage entrepreneurship and connect young people with training and job opportunities. An earlier programme, *ProJoven*, provided free vocational training for 40,000 low-income youth over ten years.<sup>13</sup> More recently, the Youth Labour Law (Ley Pulpin, 30288) was enacted with the aim of lowering youth unemployment.

<sup>13</sup> Karim, Sabrina. "Combating Youth Unemployment in Peru." *Americas Quarterly*. 15 Sept 2011. Retrieved at <http://www.americasquarterly.org/node/2882>.

# Government policy for English language learning

The government has recently become much more engaged with teaching English in schools and has committed to improving English teacher training and providing innovative teaching methods and materials in partnership with foreign governments, universities and international organisations. Historically, language learning has been complex, reflecting the need to address the language requirements of large minorities that speak indigenous languages. These groups have generally been given lower status and have faced barriers to education due to the lack of education opportunities in the mother tongue. Anecdotal evidence suggests that attitudes towards English among minority communities have been, and to some extent remain, ambivalent.

## English language policy

Peru's linguistic history is complicated. In the first Peruvian constitution in 1823, Spanish was named as the official language in spite of the fact that various indigenous languages were the main means of communication for most Peruvians. To address this, the government has created various policies to protect these languages and preserve Peru's history and culture and has developed an inclusive mind-set. As such, English has largely been treated as any other academic subject. In the 1950s and 1960s, English was taught in schools in coastal areas, but after the 1968 coup, English language teaching was actively restricted by the government. In the 1990s, an agreement was signed with the British government to assist with general and English language education. This partnership is being revived again today. As such, while Peru has put in place strategies and isolated programmes to target English language learning, it has not followed a cohesive and sequential plan of action.

In July 2014, President Humala announced that bilingual education in Spanish and English was a priority and set the goal for Peru to achieve bilingualism by 2021.<sup>14</sup> This policy was already in place in the military and should now filter through to the public school network. In 2015, the government almost doubled the education budget, and this is expected to affect English language teaching across the country. While the National English Plan is still in development, some of its goals have been announced. MINEDU has created a team to work on the plan, which already includes guidelines on how English should be taught in secondary schools and may soon include the same for primary schools. MINEDU is updating its website with the standards and details of other goals as they are defined. So far, the two main directions are increasing the numbers English teaching hours and improving the skills of English teachers.<sup>15</sup>

The government is focusing on teaching and learning in public schools from pre-primary to secondary level and on the practical use of English in business, commerce and tourism. The initial aim is to raise the total number of teaching hours to 45 per week for 350,000 pupils in 1,000 secondary schools, including raising English-language education from two hours per week to five. MINEDU has realised that under the current system of two hours per week, considering large class sizes and teachers who are often unprepared and overworked, students are not learning English or achieving set goals.<sup>16</sup> The government is also investing in the infrastructure of these schools, for example, by installing language labs. A plan to pilot English language learning in primary schools is also being formed. By 2021, all of Peru's 8,500 public secondary schools should have a 45-hour teaching week, and schools outside of the 1,000 selected institutions will be able to access lesson support, such as flashcards and syllabuses, as well as teacher training support in the meantime.

By increasing the number of overall and English language teaching hours, MINEDU anticipates a shortage of 2,300 English teachers in 2015 and 2,000 annually in the coming years. Currently, 70 per cent of English lessons are taught by teachers who are not qualified to teach English. Goals for teacher development include attracting more qualified candidates by increasing salaries and offering incentives such as scholarships, camps and contests. Teachers have already been sent to the US and the UK on scholarships to study English and teaching methodologies. While these opportunities are promoted on the MINEDU website, a lack of accessibility and marketing means that not all teachers know that such opportunities exist.

<sup>14</sup> Kerry, John. "Remarks With Peruvian President Ollanta Humala After Their Meeting." U.S. Department of State. 11 Dec 2014. Retrieved at <http://www.state.gov/secretary/remarks/2014/12/234972.htm>.

<sup>15</sup> "Latin American Economic Outlook 2015: Education, Skills and Innovation for Development." OECD, Development Bank of Latin America (CAF), United Nations Economic Commission for Latin America and the Caribbean. 2014.

<sup>16</sup> "Teacher training in Latin America." Education International. Retrieved at [http://www.ei-ie-ai.org/publicaciones/formacion-ing\\_web.pdf](http://www.ei-ie-ai.org/publicaciones/formacion-ing_web.pdf)

English has been recognised as an international language of business and a means of benefitting Peruvian businesses and development. As such, MINEDU is working with other ministries, such as the Ministry of Commerce and Tourism, the Ministry of Economy and the Ministry of Transport and Communications, to develop a national policy on English. This policy will focus on the impact of English on commerce and tourism and will guide English teaching in basic public education.

MINEDU is also developing international partnerships in English language learning and is collaborating with the embassies of Australia, Canada, the US and the UK, among others. MINEDU signed a memorandum of understanding (MoU) in late 2014 with the UK. This MoU outlined technical assistance for Peru with its English language programme, including multiple sources of assistance for both English language teaching and teacher training. The UK has also pledged to help reform Peruvian policies and curriculums and has set significant targets for 2015, the first two of which have already been achieved:

- sending 150 Peruvian English teachers to the UK for professional development
- training 400 teachers in summer schools led by 20 teachers from the UK
- providing 200 British teachers to teach in Peru, with plans to increase this number to 1,000
- helping with curriculums and methods
- increasing student mobility between Peru and the UK, with the possible goal of doubling current mobility figures

While the president has called for bilingualism with an emphasis on English, the language is not compulsory. Reflecting its concern for the preservation and protection of indigenous populations and their languages, complementary programmes exist and are being created to provide for communities that are already bilingual, speaking Spanish alongside their native tongue. For example, the Amazon Plan, also known as the Jungle Plan, aims for teaching in the native tongue or Spanish as well as the attainment of basic numeracy and literacy skills. English is mandatory in secondary school for the 15 per cent of the population that lives in the Amazon, which covers almost 60 per cent of the country; however, education access and quality concerns mean that acquiring basic skills is the priority for these students.

## English teacher training

A British Council survey on the teaching of English in primary schools worldwide found that it was acceptable for English teachers in Peru to have no formal teaching qualifications in the language and that knowing English was considered sufficient to teach the language.<sup>17</sup> Acceptable qualifications included being a native or similarly competent English speaker, being a qualified primary school teacher who has taken a pre-service specialist course in teaching English and being a university graduate in English language or literature with no formal teaching qualifications.

The English language teaching profession is not popular, and drop-out rates from five-year programmes at ISPs are high. It is common for teachers to attend college in the morning and either work or study for another programme in the afternoon. Successful qualifying teachers may still lack the required skills: a diagnostic test of English teachers revealed weaknesses in both language and pedagogy. Teachers that are fully committed to the profession often choose to work in the private sector, reflecting a lack of incentives in the public system.

Support for English teacher training is one of the main objectives of the current reforms. MINEDU aims to produce teachers that are more rounded - in terms of not only pedagogies but also blended learning models and student support - by training them in psychology and alternative teaching and learning methods. This includes training teachers to focus more on speaking and listening alongside grammar. The reforms mean that English teachers will receive professional development through online tutoring, summer schools and PRONABEC - the continuing education and scholarship arm of MINEDU - which offers scholarships to study English and pedagogical methods for English language teaching in English-speaking countries. Partnerships with universities in the UK and the US have already resulted in Peruvian teachers studying abroad.<sup>18,19</sup> This support is vital for English teachers, who have previously not had access to programmes through MINEDU or workshops through teacher associations such as IATEFL and PERUTESOL.

<sup>17</sup> Rixon, Shelagh. "British Council Survey of Policy and Practice in Primary English Language Teaching Worldwide." British Council. 2013.

<sup>18</sup> "British teachers to help improve English instruction in Peru." Fox News Latino. 24 November 2014. Retrieved at <http://latino.foxnews.com/latino/news/2014/11/24/british-teachers-to-help-improve-english-instruction-in-peru/>.

<sup>19</sup> "ASU signs partnership to educate Peruvian teachers." ASU News. 13 Feb 2015. Retrieved at <https://asunews.asu.edu/20150213-asu-partnership-to-educate-peruvian-teachers>.



## Public sentiment

As in many countries in Latin America, the English language is seen as a skill for employability in a globalised world, an indicator of education attainment and a sign of social status and prestige. However, it is also considered by some to be a potential threat to the Peruvian culture and is a cause of resentment towards globalisation.<sup>20</sup>

Many Peruvians express a sense of disappointment with the government, which they feel could be doing more to promote English language learning. This is part of a wider feeling that the government should be doing more to improve literacy and numeracy and the quality of education in general.

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<sup>20</sup> Niño-Murcia, Mercedes. "“English is like the dollar”: hard currency ideology and the status of English in Peru." *World Englishes* 22.2 (2003): 121-141.

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# English language learning analysis

## Macro evaluation of English learners

English language learning opportunities exist in secondary schools, where the subject is compulsory, and some primary schools as well as at higher education level. The quality of English language teaching and general education as well as the small number of teaching hours means that it is difficult to master English without additional help, such as from private institutes or self-access channels.

### Public education

#### *Number of pupils enrolled by level, 2013*

Pre-primary, public institutions	1,041,815
Primary education, public institutions	2,618,910
Lower-secondary education, public institutions	1,274,558
Upper-secondary education, public institutions	637,304
Total secondary education, public institutions	1,911,862

Source: UNESCO Institute of Statistics

UNESCO reports that there are over one million students in public pre-primary schools, 2.6 million students in public primary schools and almost two million students in public secondary schools. English lessons are compulsory in public secondary schools but not in primary schools. In public schools in indigenous areas, students are expected to learn their local language and then learn Spanish by the age of six. English also becomes mandatory for these students at secondary level. MINEDU estimates that students that study the language for two hours per week for five years of secondary schools, i.e. for 360 hours, should reach A2. However, they acknowledge that this does not happen in reality and cite the lack of suitably trained teachers, poor classroom management, weak pedagogical methods and large class sizes, which make it difficult to conduct communicative and participatory lessons and mean that the focus is largely on reading comprehension and writing tasks.

Owing to the lack of teachers, public schools operate two shifts: an early shift from around 7 a.m. to 12 p.m. and a late shift from 1 p.m. to 6 p.m. When the number of hours dedicated to English language learning increases from two to five, students will stay in school for longer, presenting a challenge in terms of available teachers and classrooms. As such, the government is looking to invest in infrastructure, facilities and curriculums in addition to teacher training.

The lack of skilled English teachers in the public sector is a persistent problem, and teachers of other subjects with some English skills are often used in place of qualified English teachers. While teachers are required to obtain official language certification from MINEDU, this is often not the case in reality. The minimum wage for teachers is S/.750, and an English course at the ICPNA (*Instituto Cultural Peruano Norteamericano*) can cost around S/.400. As such, English language training is costly for teachers and most teachers will only have basic English training, if any. To combat this, and as part of the reforms, the government is looking to re-evaluate the profession to promote interest.

There are also programmes that include English language learning outside of mainstream public education. One initiative includes scholarships for promising students from underprivileged backgrounds to study at 14 schools for gifted children that offer more than ten hours of English classes a week as well as external workshops. In 2015, 1,600 new students will enter this system, and 13 more schools are set to open next year.

## Private education

It is generally accepted that the quality of education in private schools is higher than in public schools. Private school students have better learning outcomes and receive better returns on education: a recent study found that 'private-public differences in returns are more pronounced at the secondary level than at any other educational level'.<sup>21</sup> Private schools have to follow certain MINEDU rules and national guidelines, including the teaching of certain subjects in Spanish.

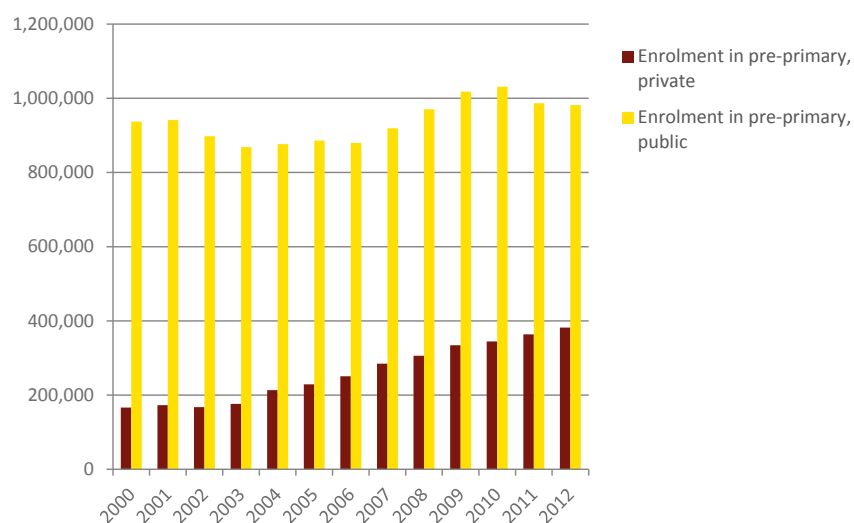
### Number of pupils enrolled by level, 2013

Pre-primary education, private institutions, both sexes	460,775
Primary education, private institutions, both sexes	926,193
Lower-secondary education, private institutions, both sexes	559,620
Upper-secondary education, private institutions, both sexes	260,280
Total secondary education, private institutions, both sexes	819,900

Source: UNESCO Institute of Statistics

UNESCO estimates that around 460,000 students are enrolled in private pre-primary schools, while 926,000 are enrolled in private primary schools and 819,000 are enrolled in private secondary schools. The overwhelming majority of private school students come from the richest 20 per cent of households in terms of consumption, while less than 1.5 per cent of students from the poorest 20 per cent of households are enrolled in private schools.

### Pre-primary enrolment



Source: World Bank

Basic education attainment - including access to quality English language classes - affects outcomes such as higher education attainment, career possibilities and income distribution. As such, parents in Peru are willing to invest highly to ensure that their children get the best education possible from an early age. Research shows that in the last decade, more than one million students moved from the public system to the private system and that at around two per cent of GDP, Peruvian household spending on education is higher than the OECD average of 1.3 per cent.<sup>22</sup>

Private schools are generally perceived to offer a better quality English language education by providing more opportunities to learn and practise the language. English is taught in many private schools from pre-primary level, and private schools

<sup>21</sup> Calónico, Sebastián, and Hugo Ñopo. "Returns to private education in Peru." *Inter-American Development Bank*. 2007.

<sup>22</sup> Mesones, Jorge A., Jorge R. Peschiera Cassinelli, and Jorge F. Baca Campodónico. "The Impact of Public Expenditures in Education, Health, and Infrastructure on Economic Growth and Income Distribution in Peru." *IDB Working Paper Series*. Feb 2014.

have incorporated more English teaching into their curriculums, offering around ten hours of English language learning per week. Private schools are also able to attract the best teachers, who have local and sometimes international qualifications, by offering significantly higher wages. They can also offer more resources, course materials and support to help teachers deliver. Private schools often have different pay scales for teachers from abroad, those who are native speakers but were hired in Peru, and local hires with English as a second or third language; this can cause internal tension. Rates of pay are also determined by the grades taught. While private schools often have the funding, faculty and facilities to produce graduates that are much more proficient in English than public school graduates, this is also a reflection in many cases of access to complementary private English tuition.

## English in higher education

Until very recently, there was little consensus on government policy for English language provision in higher education. Teacher training colleges were forced to close English pedagogy programmes due to a lack of students, while universities were not implementing standardised rules with regard entrants' and graduates' English language requirements: some higher education institutions may have English questions as part of entrance exams or a requirement to ensure students can understand English articles that are relevant to the course; some may offer English classes that are mandatory for graduation, while others may set a level of spoken English required to matriculate. A few universities, as well as the military cadets, require B2 English upon graduation, although this is not necessarily demonstrated by gaining international certification. The general outcome of these mixed approaches is that, with a few notable exceptions, students graduate from Peruvian universities with very basic English language skills.

This is beginning to change as a result of recent English language reforms. The new policies for teaching English in schools are expected to work through to universities, and the need for more qualified English teachers should also affect enrolment in teacher training at universities and ISPs. The importance of English at university level has been set down in law: Law 30220 states that knowledge of a foreign language, and preferably English, is necessary at undergraduate level, while Law 23733 states that one foreign language is needed for master's degree programmes and two are required for doctoral degrees.

The internationalisation of higher education in Peru is increasing and universities are engaging in faculty and student exchanges. The International College of Economics and Finance (ICEF) reports that 24,000 Peruvian students studied overseas in 2011, and inbound mobility is also believed to be increasing, especially among students from the US.<sup>23</sup> However, despite these promising trends, the World Bank notes that while Peruvian universities seek to participate in international activities, they are not striving to become inherently international.<sup>24</sup> Peruvian professors tend not to publish in English: one academic notes that this is partly because of difficulty writing in the concise, academic style seen in English journals.

The technical and vocational education (TVET) sector is not yet officially engaged with English language learning, although this is a high-potential area for growth. While there are colleges that offer excellent job and language training, often partnering with companies to provide English for Specific Purposes (ESP) courses, quality assurance mechanisms are not strong.

## Provision of private English language training

The most popular route for those who want to learn English to an advanced or fluent level is to attend a language institute. There are a wide range of schools, catering to different demographics, careers and geographic areas, with varying levels of quality. There are language centres in every province - even in poorest and most rural areas - meaning that those who are able to invest the time and money can improve their language skills outside of work or school.

There are many private language providers, the largest and most established of which include the Asociación Cultural Peruano Británica (Británico), which has around 50,000 students, and the ICPNA, which has locations across the country and around 55,000 students. These institutes offer qualified teachers and good infrastructure, which are highly desirable. Language centres at Pontificia Universidad Católica del Perú (PUCP) and Universidad del Pacífico also have a well-established presence. There is also a raft of smaller companies, some of which operate for only a short time before closing down.

<sup>23</sup> "Peru positioning to be the next big player in Latin America." ICEF Monitor. 26 June 2014.

<sup>24</sup> De Wit, Hans, ed. "Higher education in Latin America: The international dimension." World Bank Publications. 2005.

Programmes vary according to individual learning objectives. Courses for students range from private tutorials to small classes after school and at weekends, while courses for professionals are not uniform and have different aims: some are more academic or involve ESP, while others focus on specific skills such as writing or speaking. Many institutes have agreements with companies to train employees and help with skills such as presentations and writing emails. Companies such as Business Links and Centro de Idiomas Camelot offer industry-related courses. Some institutes also have agreements with state-run enterprises to train staff that need English skills, such as technicians at airports or in the import/export business. Other companies, including Berlitz, work with organisations to evaluate candidates' English levels. There is also a wide range of courses aimed at all ages that prepare students for international exams, many of which are aligned with the Common European Framework of Reference for Languages (CEFR).

The students attracted to private institutes vary significantly depending on the course. One administrator stated that:

'The type of students we have are mainly people who felt that through formal education (primary and secondary school and some even at a university level), they did not have enough tools to be able to learn the language properly. Most students who attend classes here do it not because they really like the language but because it is a need for them; we have students who work at the bank and other sectors where English, for them, is a necessity.'

Teachers often have other commitments and may teach English to earn extra money while they study or develop their careers. Many teachers are invited to teach based on their native or near-native English language skills or their experiences abroad. Candidates undergo internal English proficiency tests as well as interviews and training before being able to teach.

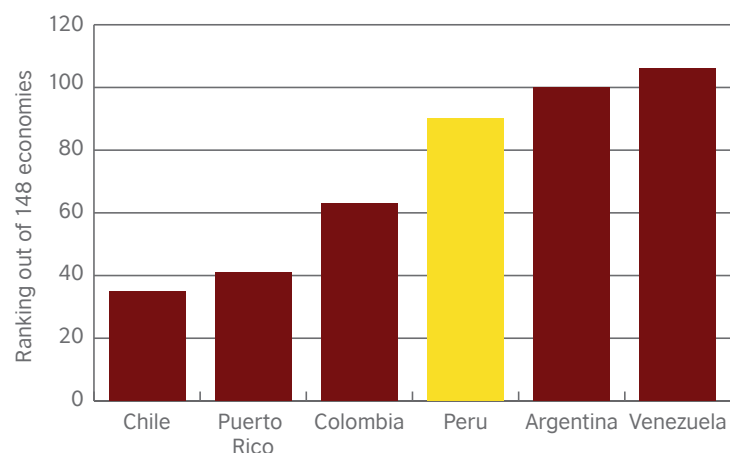
Parents' willingness to spend on quality education extends to private English language learning. Private tutors may charge anything from US\$5-20 per hour, while English classes may cost US\$15-30 per hour or around US\$120 per week, depending on the subject, frequency and level of English being taught.

## Self-access English language learning

Self-access learning encompasses private channels such as blended and informal learning through radio, print and other media. There would appear to be a large market for this type of learning in Peru, where Internet penetration is among the highest in Latin America. High-income households often have access to the Internet via personal fixed and mobile connections, while low-income families may still have access to cyber cafes or friends' Internet connections to play games or look up information online and download music and videos. Business owners in rural communities are often well connected, as they need to have contact with urban centres. The mobile phone industry is also growing, with more than 20 million mobile phone subscriptions in 2008. This medium is particularly popular in low-income communities. Mobile phone usage is believed to be higher than subscription figures suggest as 'many people use mobile phones borrowed from relatives or friends, or rented on the streets'.

While the perceived trend in Latin America is moving towards increased interest in online language courses as younger generations begin to learn the language, for now, Peruvians still prefer traditional ways of learning. One stakeholder estimated that around five per cent of English language learners currently use self-access learning, but she could see this rising to 20 per cent in the next ten years. Others see online learning as a way to increase equality and inclusion in education. Open English is the online course best known by Peruvians, reflecting the company's widespread advertising, but many Peruvians know that there are a variety of options available to them for free on the Internet. While technology is often seen as the future of education and English in Peru and is an integral part of the current reforms, there remain concerns about the viability and effectiveness of online programming.

## The Networked Readiness Index 2014



Source: Euromonitor International from World Economic Forum

Some point to the fact that in terms of Internet penetration and networked readiness, Peru's diverse geography can hinder the progression of Internet connectivity.

## International English language evaluation

### TOEFL

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

Listening	Reading	Writing	Speaking	Total
22	21	22	22	<b>87</b>

The average TOEFL score in Peru in 2013 was 87, meaning that Peruvians' skills are classified as 'high' for listening, 'intermediate' for reading and 'fair' for speaking and writing (according to the Educational Testing Service).

### IELTS

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

ACADEMIC				
Listening	Reading	Writing	Speaking	Overall
6.5	6.7	6.1	6.7	<b>6.5</b>
GENERAL TRAINING				
Listening	Reading	Writing	Speaking	Overall
6.1	5.9	6.1	6.5	<b>6.2</b>

Peruvians who took the 'academic' IELTS in 2014 scored best in reading and speaking and worst in writing, while those who took the 'general training' exam scored best in speaking and worst in reading. The average score for those who took the 'general training' exam was 6.2, which is indicative of 'competent' skills, based on IELTS definitions, while those who took the 'academic' test scored 6.5 on average, reflecting skills somewhere between 'competent' and 'good'.

## Comparative English language levels

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

COMPARATIVE ANALYSIS OF LANGUAGE TESTS		
CEFR (Common European Framework of Reference for Languages)	TOEFL iBT	IELTS Academic
C2	120	9
C2	110	8
C2	105	7.5
C1	100	7
C1	96	6.5
B2	84	6
B2	80	6
B2	71	5.5
B1	61	5
B1		Between 4.5-5
A2		Less than 4

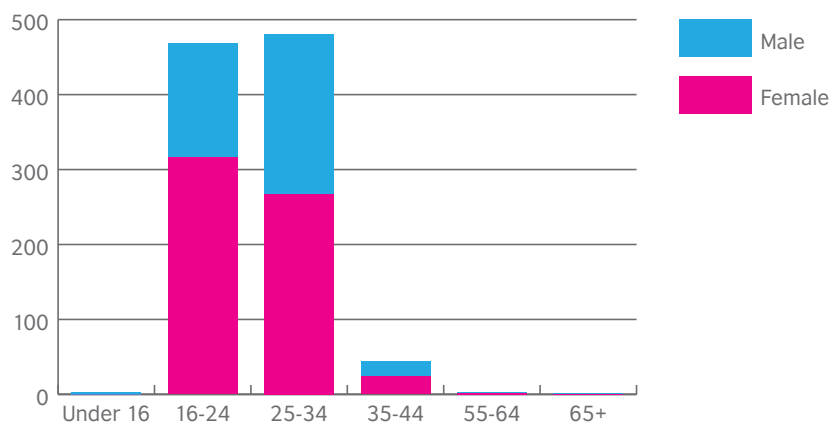
Peruvians' IELTS and TOEFL scores reflect a low to medium level of English, equivalent to around B2/C1.

# English learning motivations

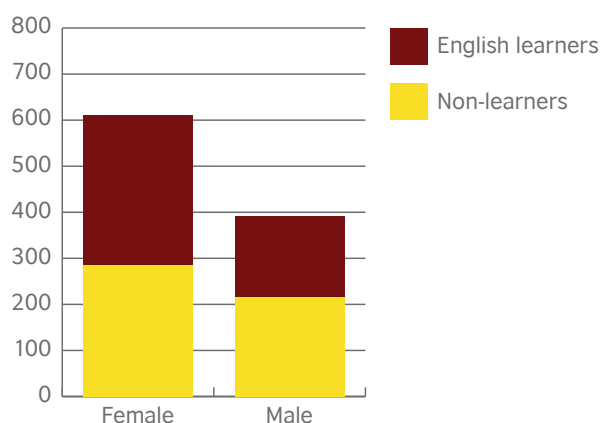
The British Council surveyed 1,002 Peruvians to better understand attitudes towards English language learning. The survey was conducted in Spanish. With this questionnaire we aimed to ascertain the occupations, income levels, interests and viewpoints of English learners and non-learners. By contrasting the positive and negative responses, we hoped to gain insight into the differences and similarities in opinions and the value placed on English language learning.

## Survey respondents

Most of the respondents were between the ages of 16 and 34: around 40 per cent were aged 16-24, while 50 per cent were aged 25-34. Around 60 per cent of respondents were female, and 53 per cent of females reported that they had studied English, compared to 45 per cent of male respondents.



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



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



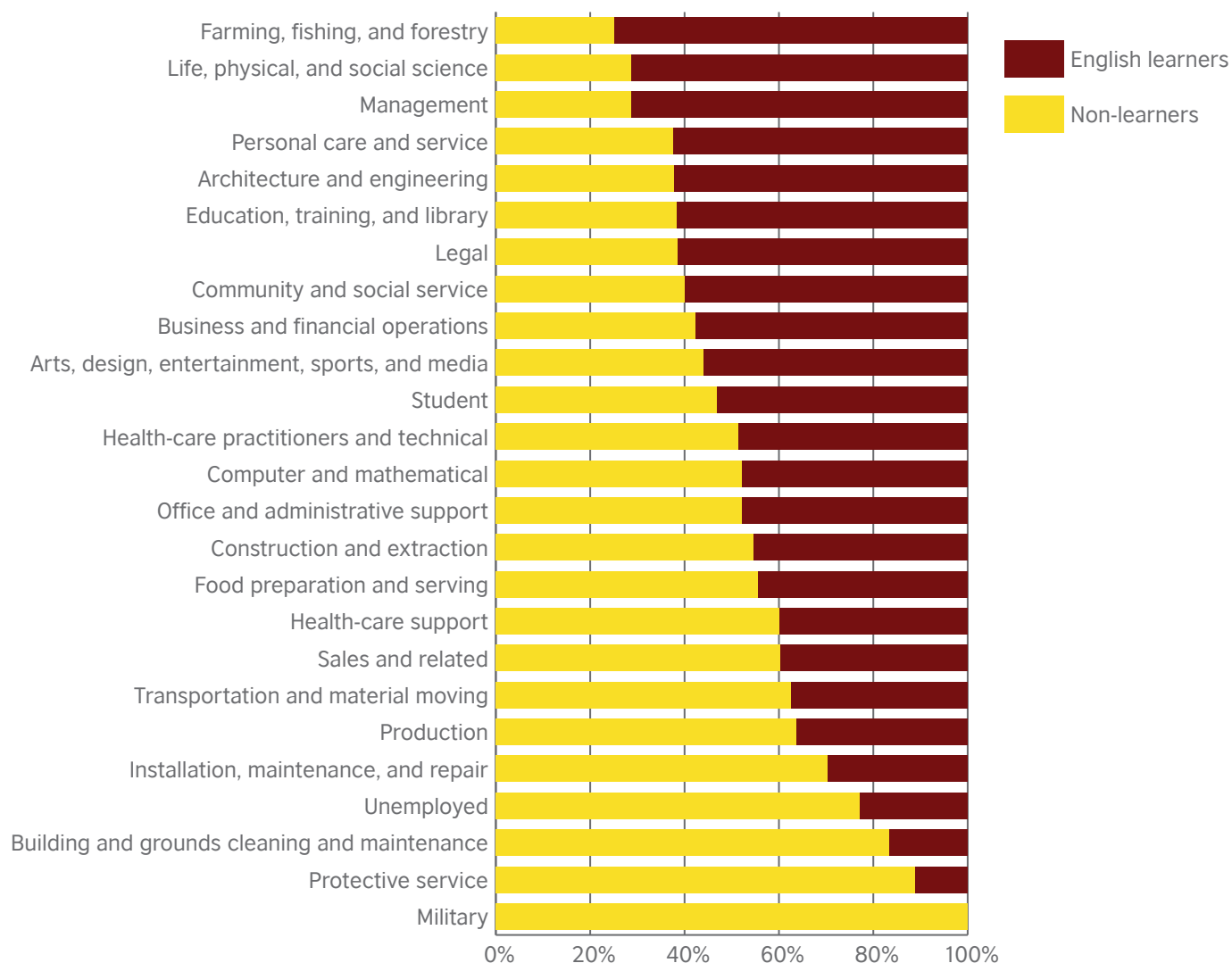
### *Proportion of English learners by province*

This table shows the proportion of respondents in Phase 1 that had studied or were studying English, broken down by their state of residence. In a number of states there were fewer than five respondents, meaning that figures for these areas are less likely to be representative of the regional populations. These states were: Apurímac, Ayacucho, Amazonas, Pasco, Tumbes, Huancavelica, Huánuco, Madre de Dios, Moquegua and Ucayali.

Province	Per cent of respondents that have learned English
Amazonas	100%
Ancash	73%
Cajamarca	73%
Lambayeque	68%
San Martín	67%
Loreto	64%
Tacna	56%
Cusco	55%
La Libertad	52%
Arequipa	51%
Piura	51%
Lima	49%
Callao	46%
Junín	42%
Huánuco	33%
Madre de Dios	33%
Ica	29%
Moquegua	25%
Ucayali	25%
Puno	20%
Apurímac	0%
Ayacucho	0%
Huancavelica	0%
Pasco	0%
Tumbes	0%

## Occupation and English language learning

Respondents were asked to identify their occupation from a list of industries. This selection was then cross-referenced with respondents' experiences of English learning. In some occupations there were fewer than five respondents, meaning that figures for these categories are less likely to be representative of the sector as a whole. These occupations were farming, fishing, and forestry, community and social service, health-care support and military.

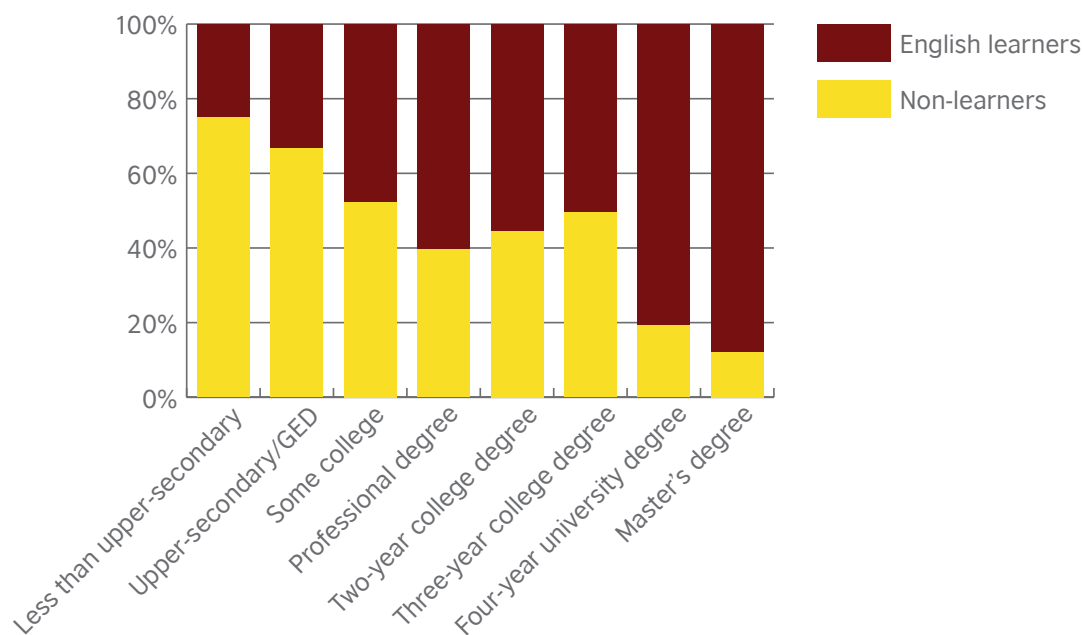


Source: British Council, Education Intelligence, Latin America Databank 2015

The occupations that had the highest proportions of English language learners were farming, fishing and forestry (75%), life, physical and social science (71%) and management (71%). Other occupations where the majority of respondents were English learners were personal care and service (63%), architecture and engineering (63%), education, training and library (62%), legal (61%), community and social service (60%) and business and financial operations (58%). In addition, just over half of the students surveyed (53%) were English learners.

The industries that had the highest proportions of non-learners were the military (0% English learners), protective service (11%) and building and grounds (17%) as well as installation, maintenance and repair (30%), production (37%) and transportation and material moving (38%). Less than a quarter (23%) of the unemployed in our survey were English learners.

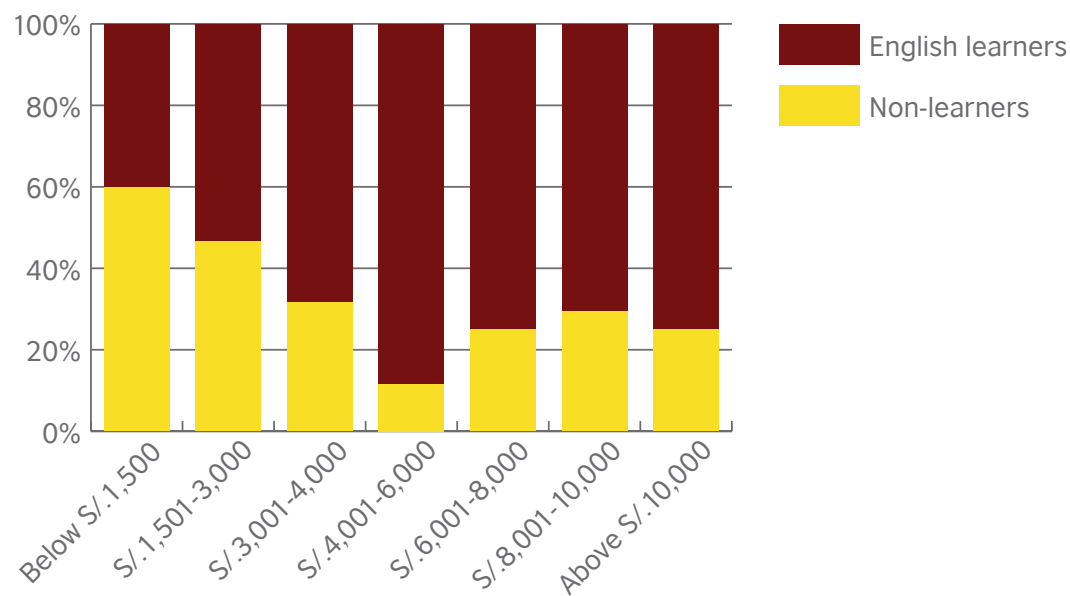
## Education and English language learning



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

For the most part, respondents that had not finished upper-secondary school had never studied English: just 25 per cent of these respondents were English learners. As the level of education increased, the proportion of non-learners fell significantly: around 60 per cent upper-secondary graduates were non-learners, compared to around 50 per cent of college graduates and only 40 per cent of respondents with a professional degree. At the university level, the majority of respondents were English learners: only 19 per cent of those with a four-year university degree and 12 per cent of those with a master's degree had not learned English.

### Household income and English language learning



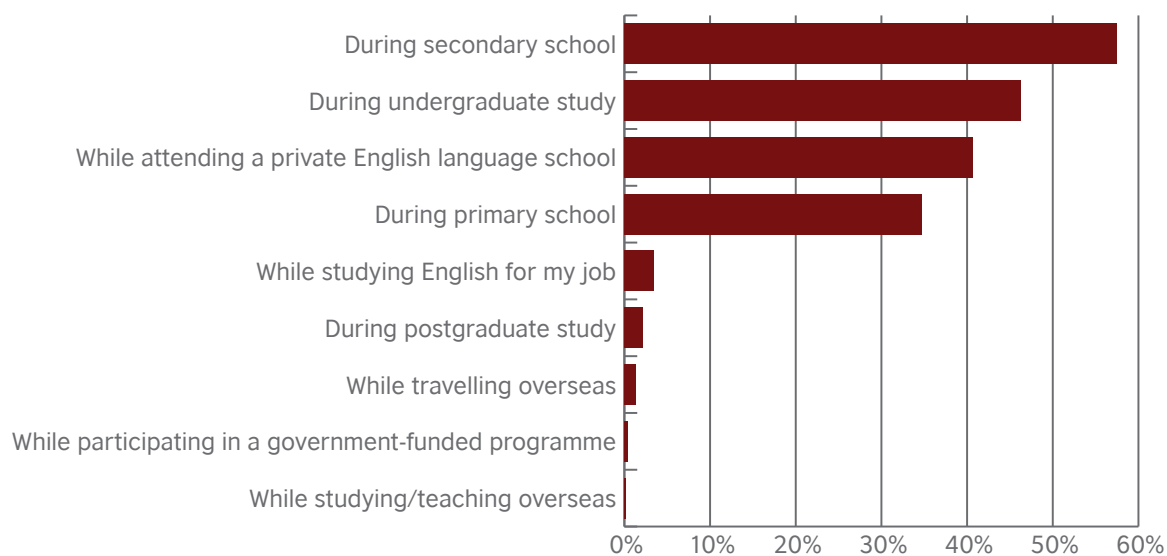
Source: British Council, Education Intelligence, Latin America Databank 2015

There is generally a direct correlation between higher incomes and English learning in Peru. In the lowest income band - which includes around 50 per cent of respondents in our survey - 60 per cent of respondents were non-learners. Among all other income bands, the majority of respondents were English learners, ranging from 53 per cent of respondents with monthly income of S/1,501-3,000 to 88 per cent of those with income of S/4,001-6,000. In the three highest income bands, 71-75 per cent of respondents were English learners.

## Motivations for studying English

Of the 1,002 respondents, 501 indicated they had learned or were learning English. In order to better understand their experiences, we asked these respondents when and why they had learned the language. We then asked them to evaluate their reading, writing and speaking skills.

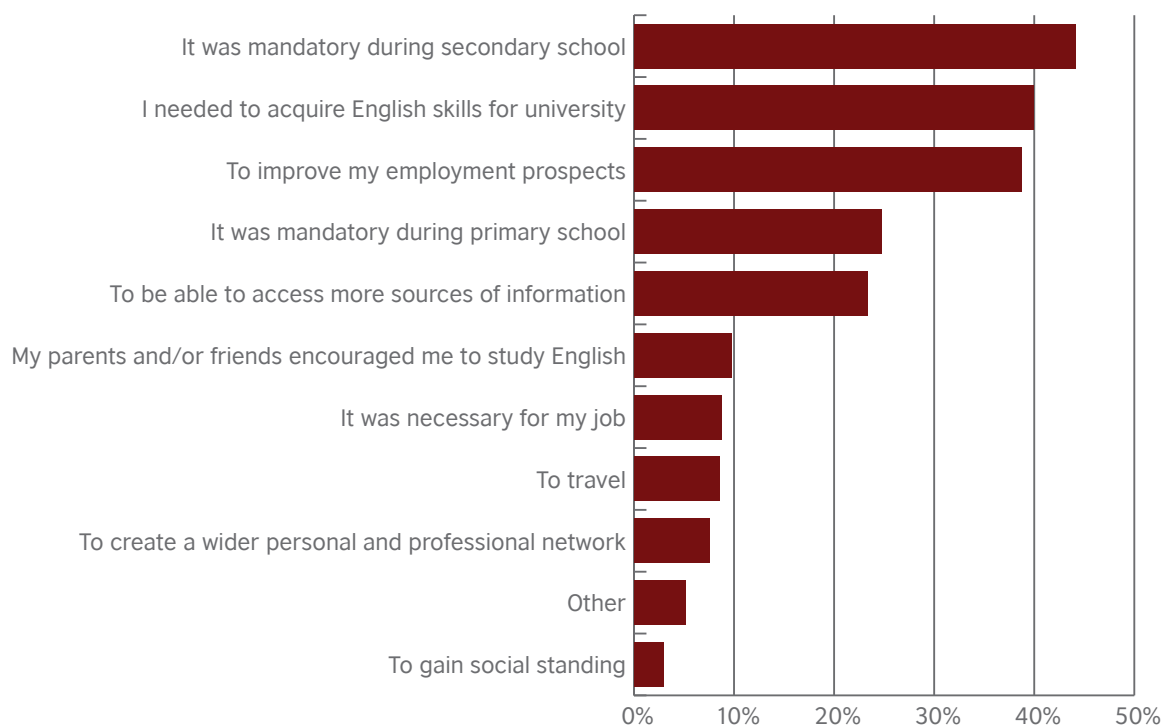
### *When did you study English?*



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

Respondents were asked when they had learned English. As many people use multiple pathways for language learning, participants were allowed to choose more than one answer. We found that Peruvians were most likely to have studied English at school: 57 per cent of English learners had studied the language at secondary school, while 46 per cent had studied it at undergraduate level and 35 per cent had studied it at primary school. However, a large share of respondents had studied at a private English school (41%). Very few had learned English for a job (3%) or as part of a government-funded programme (0.4%).

### Why did you study English?

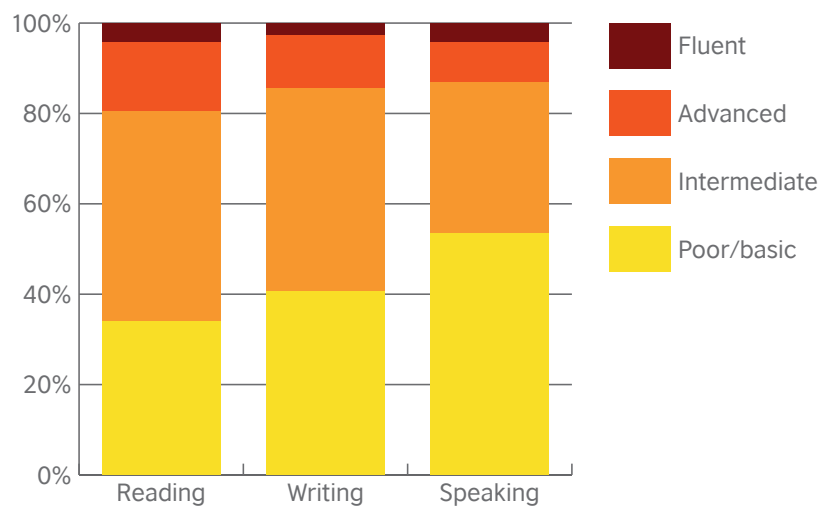


Source: British Council, Education Intelligence, Latin America Databank 2015

Most major motivations for learning English relate to education and employment, although motivations vary significantly. The largest proportion of respondents (44%) had learned English because it was mandatory during secondary school, while a quarter (25%) had learned because it was mandatory during primary school. A further large share (40%) had learned because it was necessary for university. While more than one in three respondents learned English to improve their employment prospects (39%), just nine per cent learned because it was necessary for their job, indicating that Peruvians may take a proactive or pre-emptive approach to learning English for the job market. A further large share of respondents (23%) learned English to access more sources of information. Other motivations reported less frequently included to travel (9%), because parents and/or friends encouraged them (10%), to create wider personal and professional networks (8%) and to gain social standing (3%).

## English proficiency

We asked the 501 respondents who had studied English to assess their skills, choosing from Poor/basic, Intermediate, Advanced and Fluent. The results were particularly interesting when cross-referenced with education levels: respondents with less than an upper-secondary education were much more likely to assess their skills as poor/basic than those with a four-year degree.



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

While this evaluation was subjective, the majority of respondents did not consider any of their English skills to be advanced, and only three to four per cent considered themselves fluent. Peruvian English learners were largely more confident in their reading and writing skills than their speaking skills: more than half (53%) of respondents described their speaking skills as Poor/basic. The share of advanced respondents was highest for reading skills (15%), and just 34 per cent of respondents described their reading skills as Poor/basic.

## English proficiency by occupation

Next, we considered self-reported skills broken down by industry. The scores in the table below represent the ratio of high-proficiency learners (Fluent or Advanced) to low-proficiency learners (Intermediate or Poor/basic): the higher the score, the higher the self-rated ability in that occupation. As there were fewer than five respondents in the farming, fishing, and forestry, community and social service, health-care support and military sectors, figures for these categories are less likely to be representative of the sector as a whole.

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

	READING	WRITING	SPEAKING
Architecture and engineering	0.31	0.19	0.19
Arts, design, entertainment, sports and media	0.27	0.21	0.21
Building and grounds cleaning and maintenance	0.00	0.00	0.00
Business and financial operations	0.42	0.31	0.21
Community and social service	2.00	2.00	2.00
Computer and mathematical	0.28	0.05	0.05
Construction and extraction	0.00	0.00	0.00
Education, training and library	0.62	0.62	0.62
Farming, fishing and forestry	2.00	0.00	0.00
Food preparation and serving	0.00	0.00	0.00
Health-care practitioners and technical	0.21	0.21	0.31
Health-care support	0.00	0.00	0.00
Installation, maintenance and repair	0.60	0.60	0.00
Legal	0.33	0.14	0.33
Life, physical and social science	0.00	0.00	0.00
Management	0.19	0.17	0.17
Military	0.00	0.00	0.00
Office and administrative support	0.06	0.06	0.03
Personal care and service	0.00	0.25	0.00
Production	0.09	0.00	0.00
Protective service	0.00	0.00	0.00
Sales and related	0.14	0.06	0.10
Student	0.25	0.16	0.14
Transportation and material moving	0.00	0.00	0.00
Unemployed	0.31	0.13	0.13

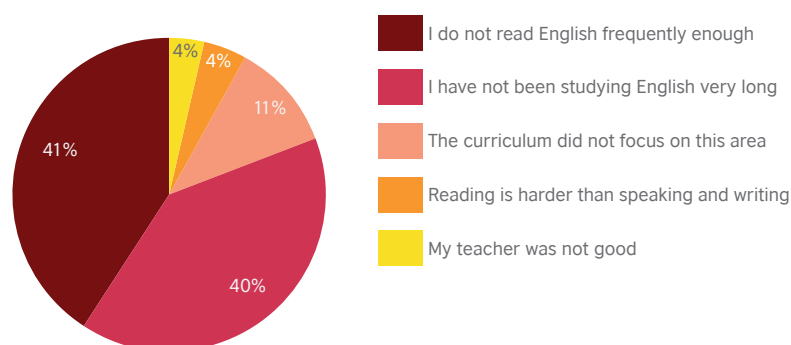
Source: British Council, Education Intelligence, Latin America Databank 2015

The occupation that had consistently high levels of self-assessed English skills was education, training and library, while business and financial operations had high levels of reading skills but lower levels of writing and speaking skills. This trend for higher English reading proficiency was found in a number of other occupations, including architecture and engineering, computer and mathematical and sales and related, and it was also evident among students and the unemployed. The industries with the lowest levels of proficiency in all categories were management, office and administrative support and sales and related.



## Reading skills in English

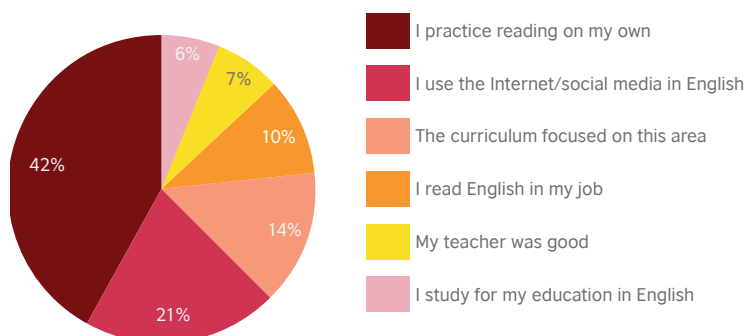
We asked respondents who evaluated their reading skills as Poor/basic or Intermediate why they felt their skills were lacking.



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

The largest share of respondents (41%) felt that the responsibility for their weak reading skills was their own, citing that they did not read English frequently enough. A further 40 per cent attributed this to not having been studying English for very long. Few respondents attributed their weak skills to the education system, including poor curriculum design (11%) and weak teachers (4%). A small share of respondents (4%) felt that their skills were weak because reading was harder than speaking or writing.

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

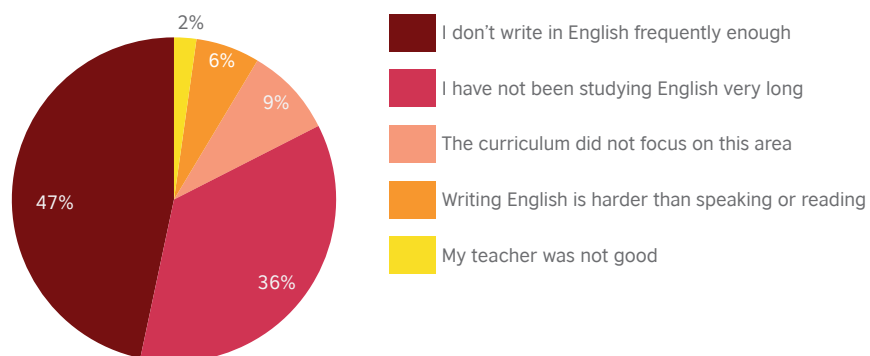


Source: British Council, Education Intelligence, Latin America Databank 2015

Overall, respondents felt that their good reading skills were largely a product of their own efforts as opposed to the strengths or weaknesses of their teachers or education. Significant shares attributed their skills to reading English on their own (41%) and using the Internet and social media in English (21%). Other shares attributed their skills to their circumstances, including having to read in English as part of their job (10%) or their academic course (6%), or to factors such as the curriculum (14%) or their teachers (7%).

## Writing skills in English

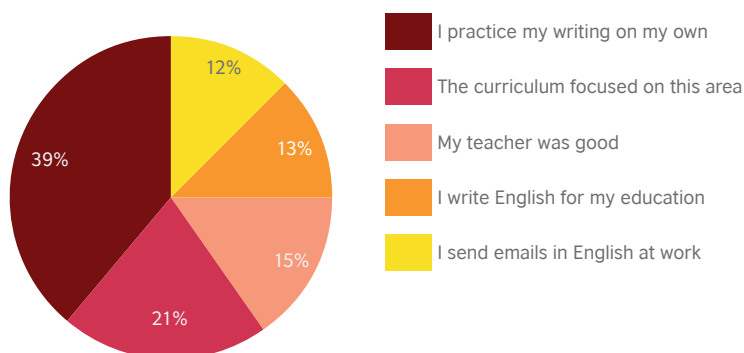
We asked respondents who evaluated their writing skills as Poor/basic or Intermediate why they felt their skills were lacking.



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

As with weak reading skills, the largest share of respondents felt that this was attributable to a lack of practice: 47 per cent said that they did not write English frequently enough. The other major reason was that they had not been studying English long enough (36%). Smaller shares of respondents blamed their weak skills on the curriculum (9%) or their teachers (2%), and a further six per cent felt that it was because writing English was harder than speaking or reading.

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



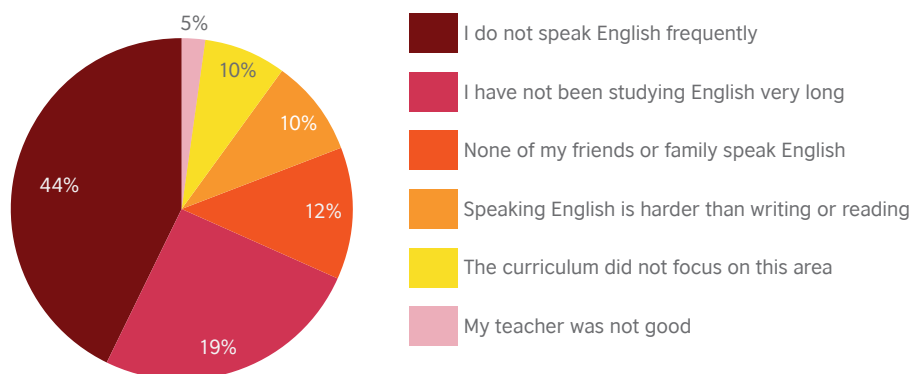
Source: British Council, Education Intelligence, Latin America Databank 2015

Again, those who were confident about their skills attributed this to their own efforts and practice in writing English (39%). However, significant shares attributed this to a strong curriculum focus on writing skills (21%) or their teachers (15%). Writing in English for an academic course (13%) or a job (12%) were less significant driving factors.

As such, self-initiated learning appears to play an important role in developing writing skills for Peruvians. This may reflect both deficiencies in the education system in terms of opportunities to practise writing skills as well as a preference for a blend of teacher- and student-led writing tasks.

## Speaking skills in English

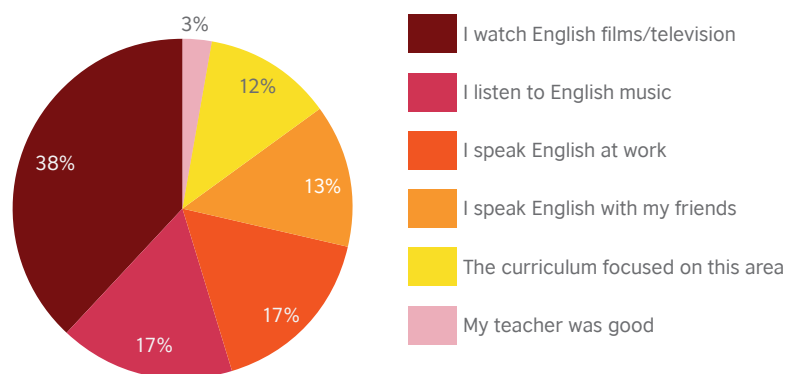
We asked respondents who evaluated their speaking skills as Poor/basic or Intermediate why they felt their skills were lacking.



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

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

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



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

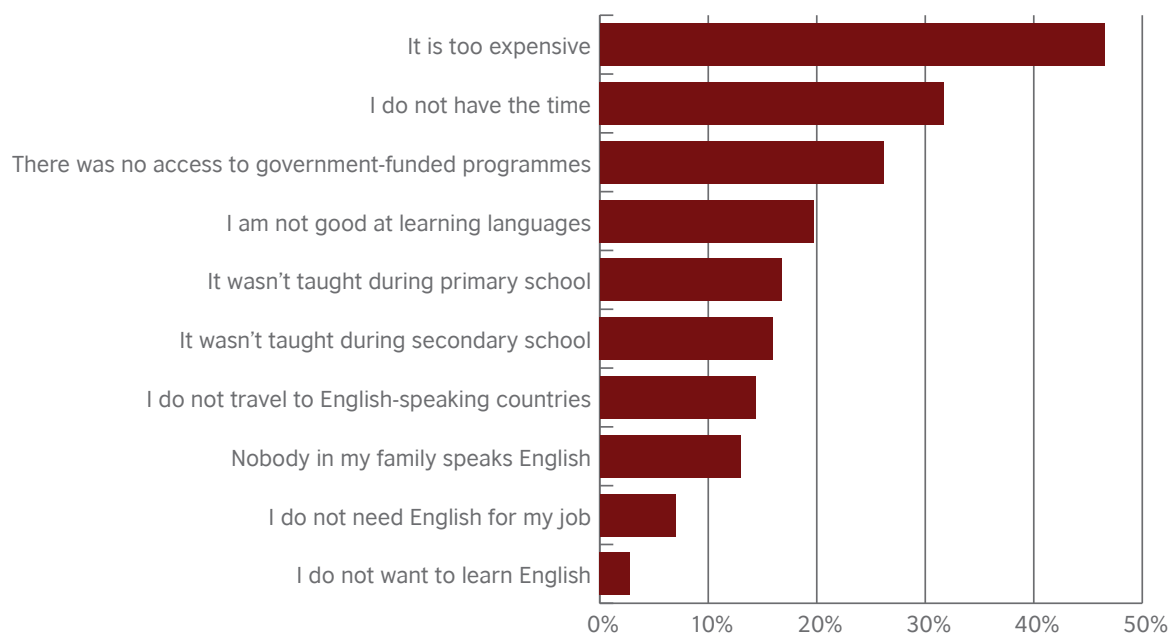
The largest shares of those that felt confident in their English speaking skills (Advanced and Fluent) said that it was due to social and cultural factors such as watching English language films and television (38%), listening to music with English lyrics (17%) and speaking English at work (17%) and with friends (13%). Only 3 per cent credited their teachers for their strong English speaking skills, while 12 per cent attributed them to the curriculum. This highlights the importance for Peruvians of engaging with the English language in various aspects of life outside of education.

Our findings suggest that English language learners may have a lack of opportunity to practise speaking English, but those that are able to practise and expose themselves to English media are able to develop strong skills. This discrepancy may also be related to learning styles and perceptions of the value of English, as access to English language media is increasing overall. The current English learning environment is also more suited to those that learn from observation than those who learn through practice.

## Barriers to studying English

We asked the 501 respondents who had not learned English about their experiences with the language and what might encourage them to learn the language in the future.

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



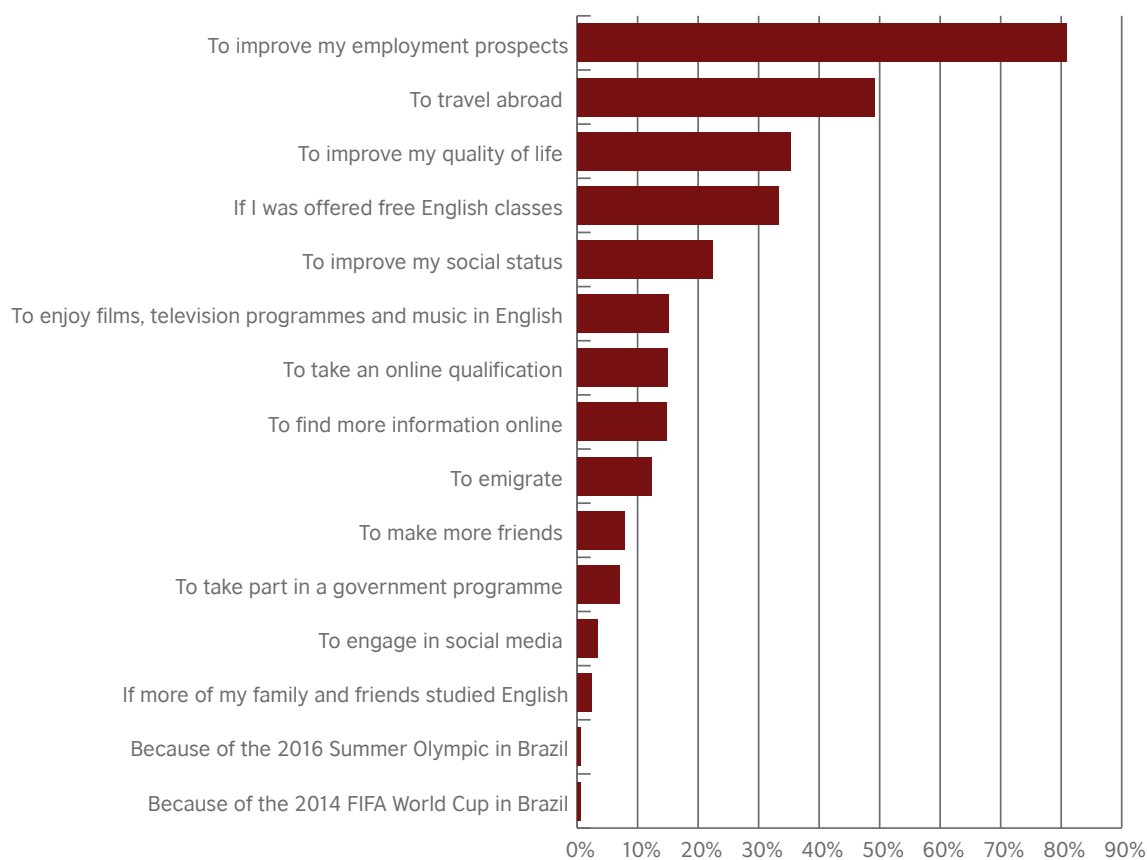
Source: British Council, Education Intelligence, Latin America Databank 2015

Survey respondents could choose multiple answers. The most significant reasons for not learning English were related closely to cost and access: almost half of respondents (47%) reported that English language learning was too expensive, while almost a third (32%) said that they had no time and more than a quarter (26%) cited the lack of access to government-funded programmes. In addition, one in five respondents had not learned because they felt they were not good at learning languages, while other shares attributed this to the lack of English teaching in primary (17%) or secondary (16%) school. Small but significant shares had not learned because they did not want to (7%) or because English was not necessary for employment (3%).

As such, the majority of non-learners would like to study English or feel that they need to study English for work but also feel that they cannot do so as they lack the money, time or access to government-funded programmes.

## What could motivate you to start learning English?

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

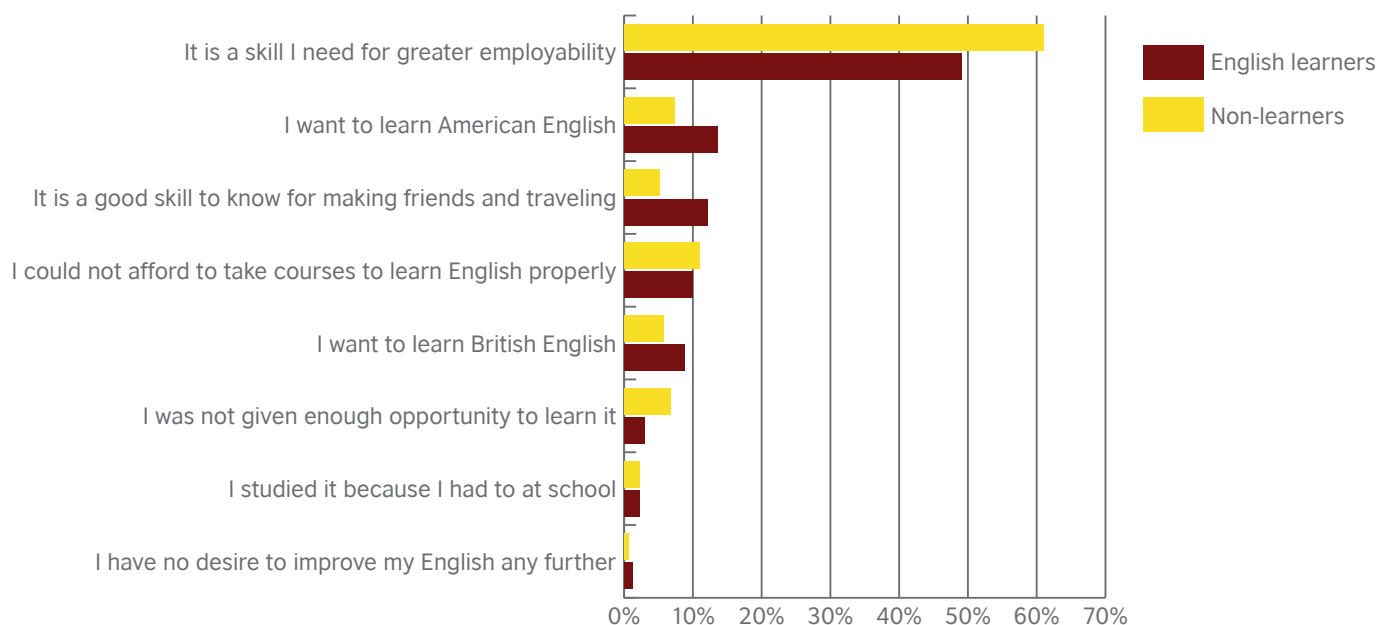


Source: British Council, Education Intelligence, Latin America Databank 2015

Respondents indicated overwhelmingly that the strongest motivator to learn English would be to improve employment prospects (81%). However, almost half of the respondents would study English if it enabled them to travel abroad (49%) and other large shares would also be motivated by more personal factors such as improving quality of life (35%) or social status (22%). Smaller motivating factors were to enjoy films, television programmes and music in English (15%), to take a course online (15%) and to find more information online (15%), while factors such as major international events within the region were given little importance. Interestingly, while 26 per cent of respondents attributed their non-learner status to a lack of government-funded courses, a third (33%) would be motivated to study if such courses were available. This underlines the finding that cost is a major barrier to access; however, the time element is also a factor not to be overlooked.

## Views of learning English

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



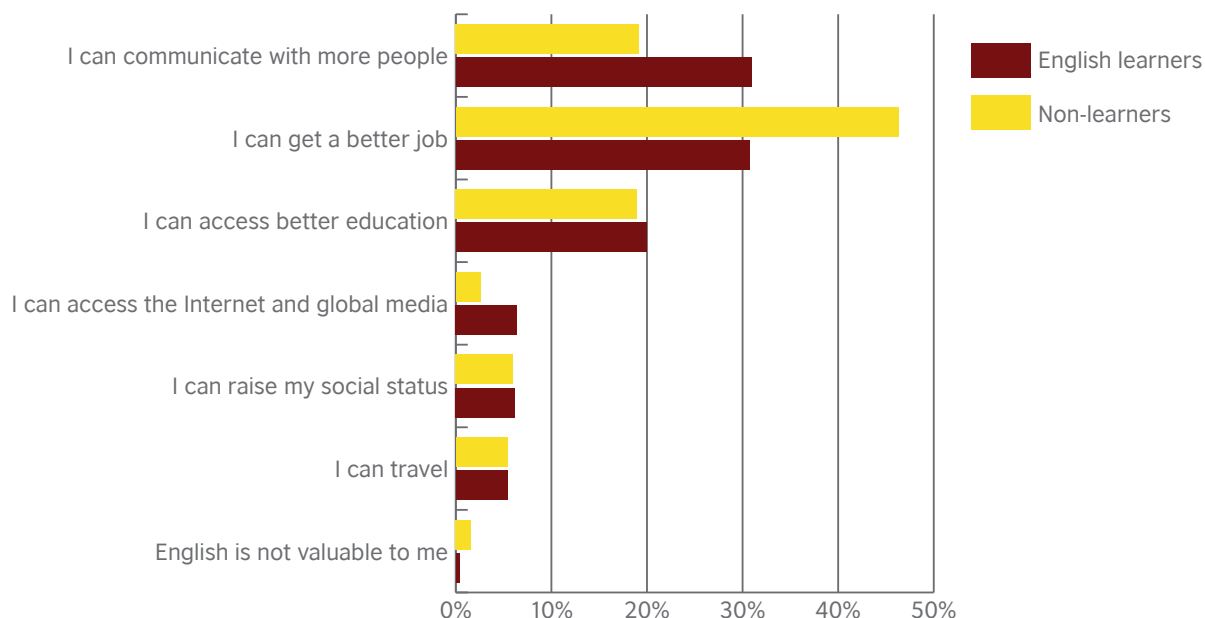
Source: British Council, Education Intelligence, Latin America Databank 2015

The views of non-learners largely matched those of English learners: the largest share of each group felt that English was a necessary skill for employability (61% and 49%, respectively). Both groups also felt a slight preference for learning American English over British English, but English learners were much more likely to recognise the importance of English for travelling and making friends (5% of non-learners versus 12% of English learners). Very few English learners (1%) and non-learners (1%) had no desire to improve their English, and similarly small shares (2% each) had only studied the language because they had to in school. As expected, non-learners were more likely to feel that they were not given enough opportunity to learn English (7%) than English learners (3%).

The results highlight the findings above that Peruvians believe that English is essentially a skill for enhancing employability, and this belief is particularly strong among those that have not studied English, potentially reflecting the higher salaries often earned by English learners, who also tend to have a higher level of education overall.

## Value of learning English

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



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

As with their views on English, both learners and non-learners placed the most value on English as a skill for enhanced employability (46% and 31%, respectively). English learners were much more likely than non-learners to value English as a communication tool (31% versus 19%); this may highlight the increased awareness of opportunities for intercultural interaction that comes from having learned another language. Both groups held similar views on the value of English for education (20% of learners and 19% of non-learners). Other values attributed to English were much less significant, and, importantly, less than one per cent of English learners and two per cent of non-learners associated English primarily with having no personal value.

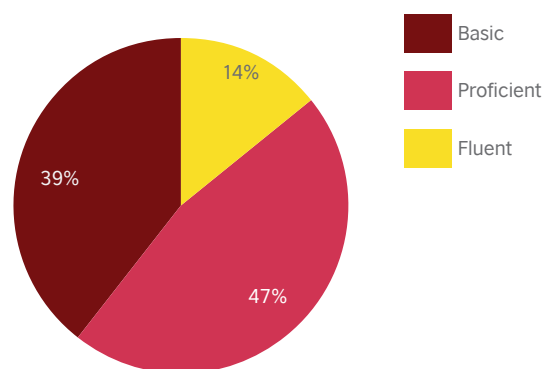
The findings highlight that the desire to learn English is widespread and is closely linked with employability and other factors associated with increased quality of life, such as education, travel and status.

# Employer demand for English

We surveyed 137 employers from different industries to better understand the relationship between employers, employment and English language acquisition.

## Management profile

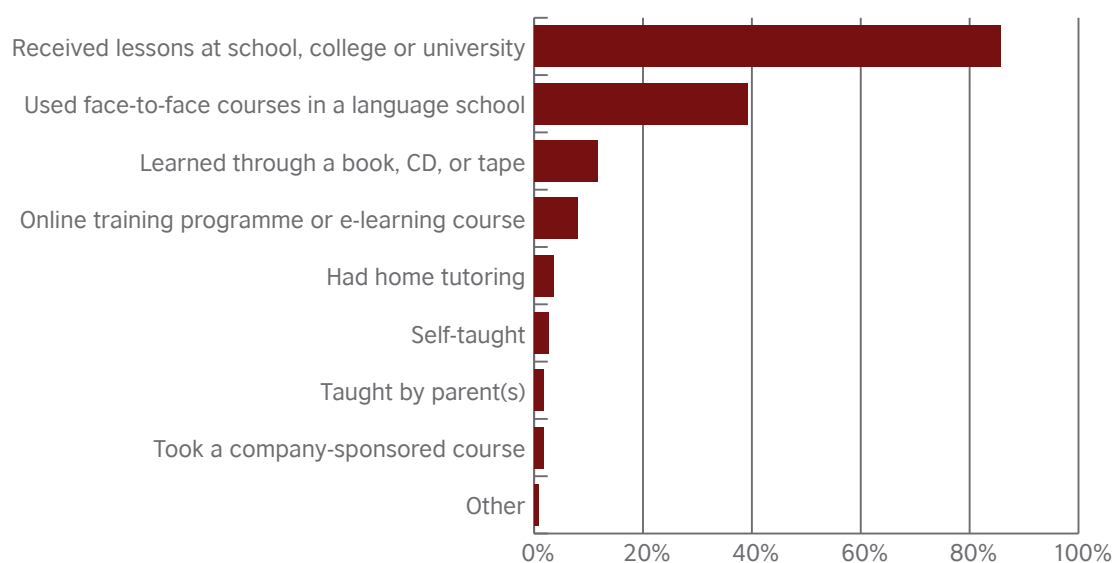
The individuals who participated in the survey were employed at the managerial or executive level, meaning that they had attained high employment status that others often aspire to. Over 75 per cent of respondents worked in management, either as managing directors or in general management or human resources.



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

All respondents were fluent in Spanish, but the majority (82%) also had English language skills. Of the respondents who reported having English skills, 14 per cent described them as fluent and 47 per cent, as proficient. Almost a third (31%) described their English skills as basic, indicating that strong English language proficiency is not yet a requirement among managerial staff.





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

The vast majority of the respondents who had learned English did so at school, college or university (86%). However, more than a third (39%) had attended face-to-face lessons at a language school and more than one in ten had learned through a book, CD or tape (12%). A further 8 per cent had used online training programmes or e-learning courses, while four per cent had been tutored at home.

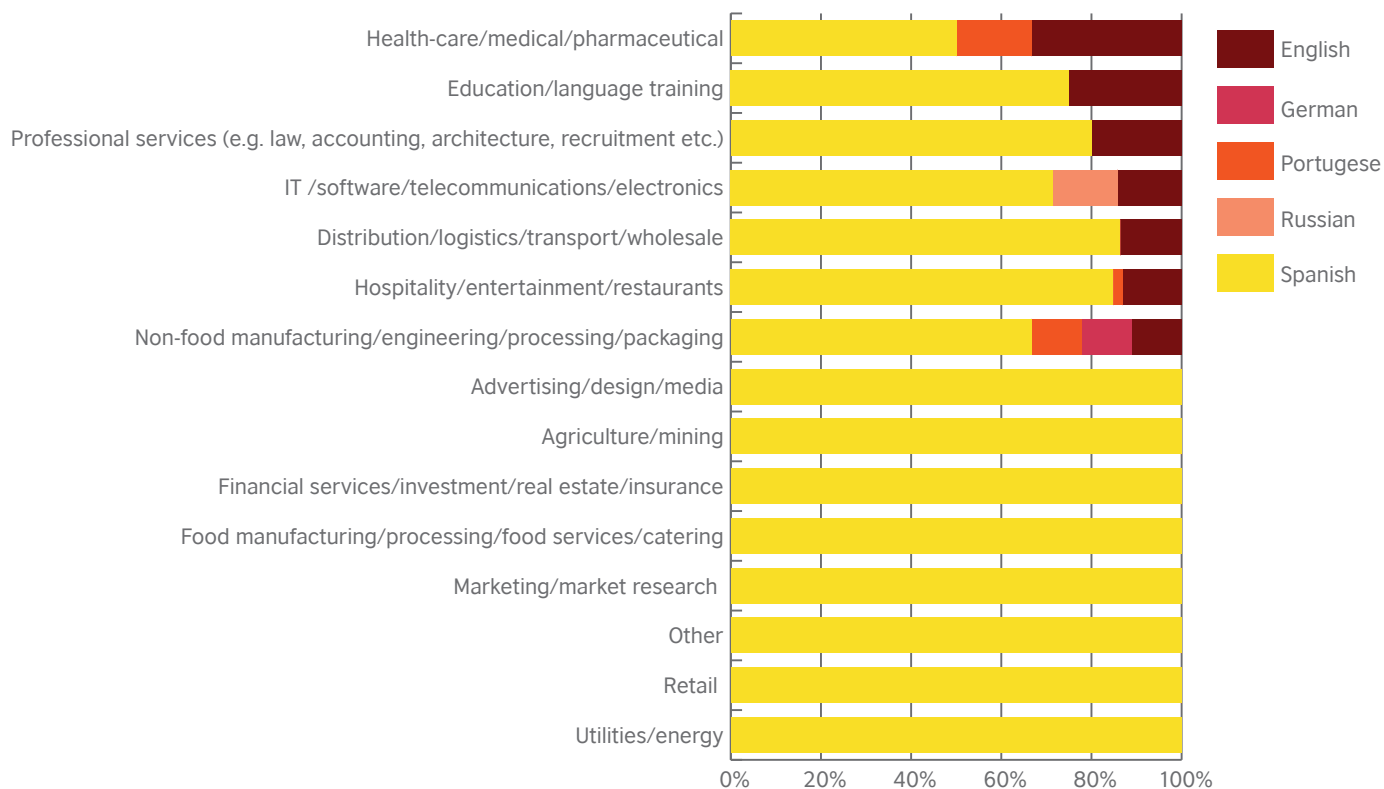
## Employer analysis

Most of the companies represented in the survey were based in Lima (78%), but there was also representation from Arequipa (8%), Cuzco (5%) and Huancayo (3%), while the remainder came from small towns in rural areas. The companies represented a good range of sizes: 51 per cent employed fewer than 50 people, while 17 per cent had 50-100 employees, 18 per cent had 100-249 employees and 14 per cent had more than 250 employees.

INDUSTRY	NUMBER OF RESPONDENTS
Hospitality/entertainment/restaurants	41
Distribution/logistics/transport/wholesale	19
Professional services (e.g. law, accounting, architecture, recruitment etc.)	14
Utilities/energy	10
Agriculture/mining	9
Other	8
Non-food manufacturing/engineering/processing/packaging	6
Retail	6
Food manufacturing/processing/food services/catering	5
IT/software/telecommunications/electronics	5
Financial services/investment/real estate/insurance	4
Health-care/medical/pharmaceutical	4
Education/language training	3
Marketing/market research	2
Advertising / design / media	1

The companies represented a wide range of industries, allowing inter-industry comparisons. The most common industry was hospitality, entertainment and restaurants, with 30 per cent of respondents. Also well represented were distribution, logistics, transport and wholesale (14%) and professional services (10%).

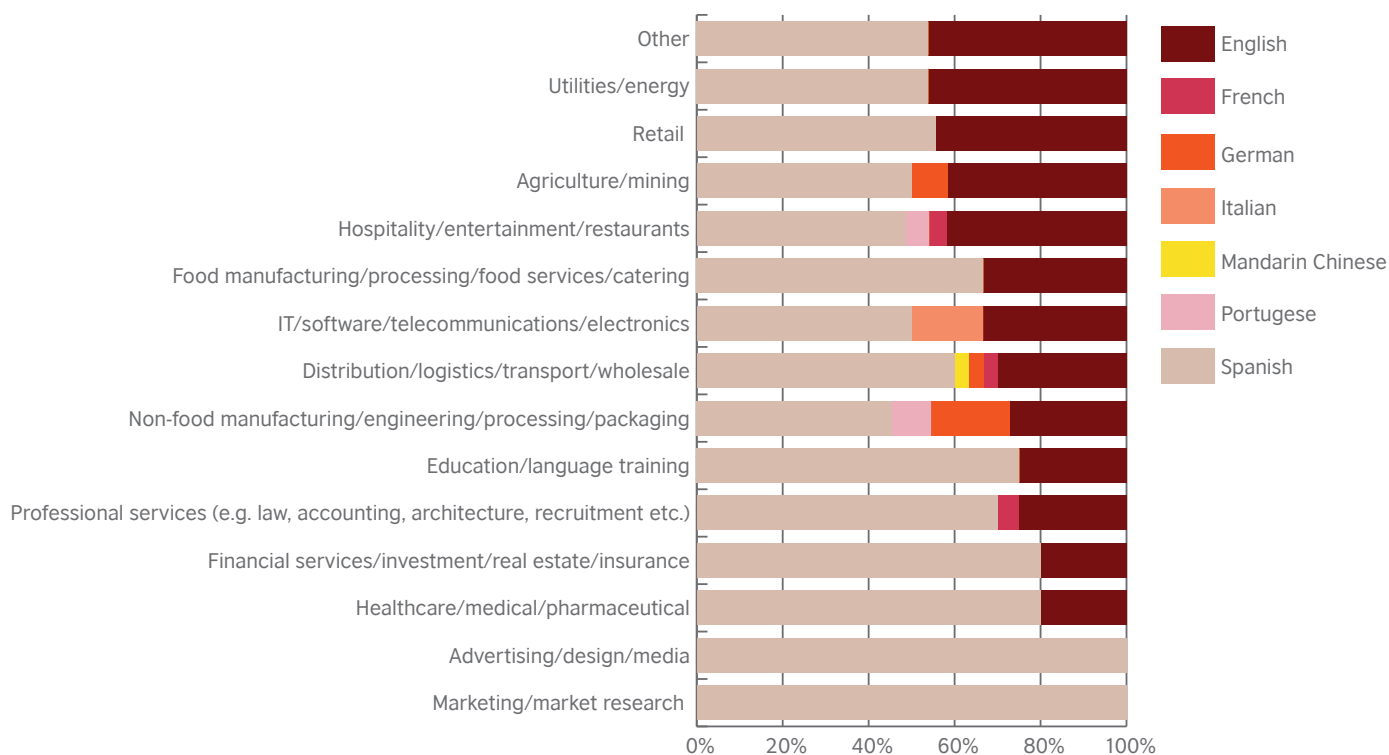
*Languages used internally*



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

To better understand the role of English in industry in Peru, we asked respondents what language was generally used internally in their company. The most common language used internally was Spanish, but there were also some companies that predominantly used English internally: industries where companies were more likely to speak English internally included health-care, medical and pharmaceutical, professional services and education and language training.

### Languages used externally

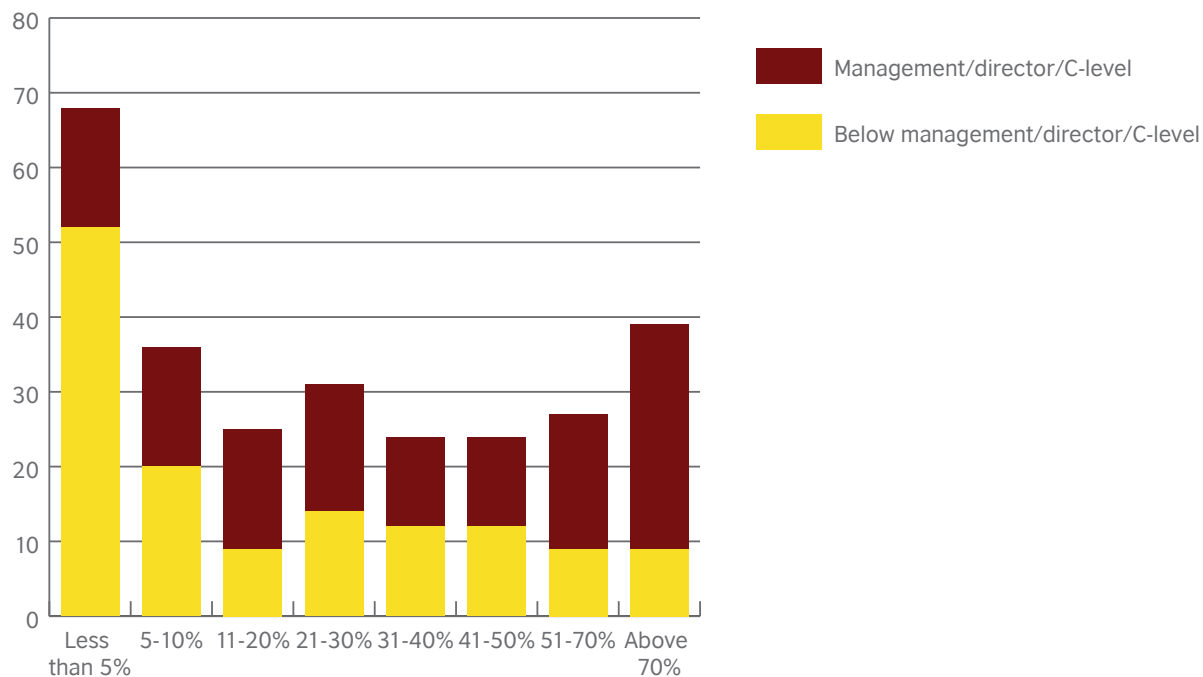


Source: British Council, Education Intelligence, Latin America Databank 2015

Respondents also reported the languages used externally by their company. Companies were more likely to use English as the main language externally (55%) than internally (12%). The industries that were most likely to use English externally included utilities and energy, retail, non-food manufacturing, engineering, processing and packaging, hospitality, entertainment and restaurants, and agriculture and mining.

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

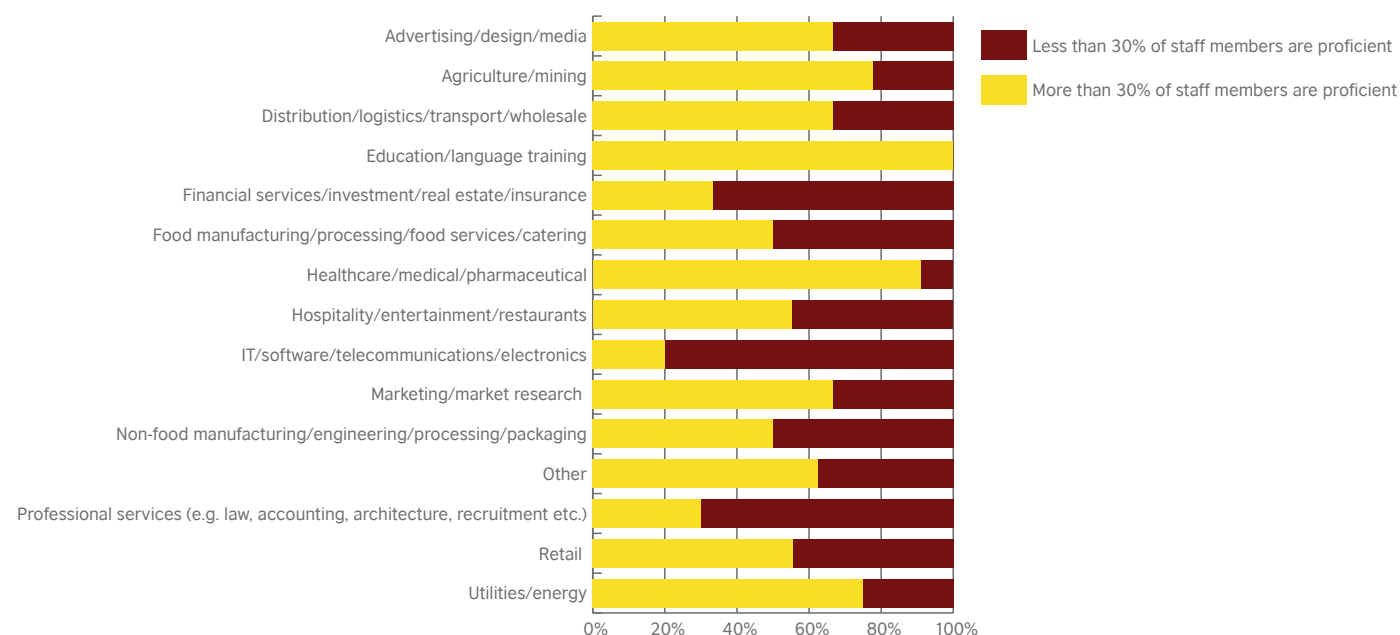
*Percentage of employees proficient in English*



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

The results indicated that English proficiency is low overall among employees in Peruvian companies. The largest share of respondents (38%) reported that less than five per cent of non-managerial staff were proficient in English, while a further 15 per cent reported that just 5-10 per cent of non-managerial staff were proficient in English. Generally, employers reported higher English proficiency among managerial staff: the largest share of respondents (22%) indicated that more than 70 per cent of managerial staff were proficient in English.

## Percentage of employees proficient in English by industry



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

The industries that employed a higher proportion of staff with good English proficiency included utilities and energy, hospitality, entertainment and restaurants, education and language training, agriculture and mining, and health-care, medical and pharmaceutical. In some of these industries, a higher level of English may be expected as the work involves communicating with foreigners, including tourists, foreign investors and multinational companies. The results for utilities and energy and agriculture and mining reflect the growing need for English in these sectors: these industries showed a high level of English proficiency among employees as well as relatively high use of English for external purposes. While few managers reported English proficiency among staff in the retail sector, this industry had a high proportion of respondents stating that English was used externally. This may reflect the more frequent use of English externally among high-level and managerial staff in this sector as well as a potential unmet demand for English skills among other employees.

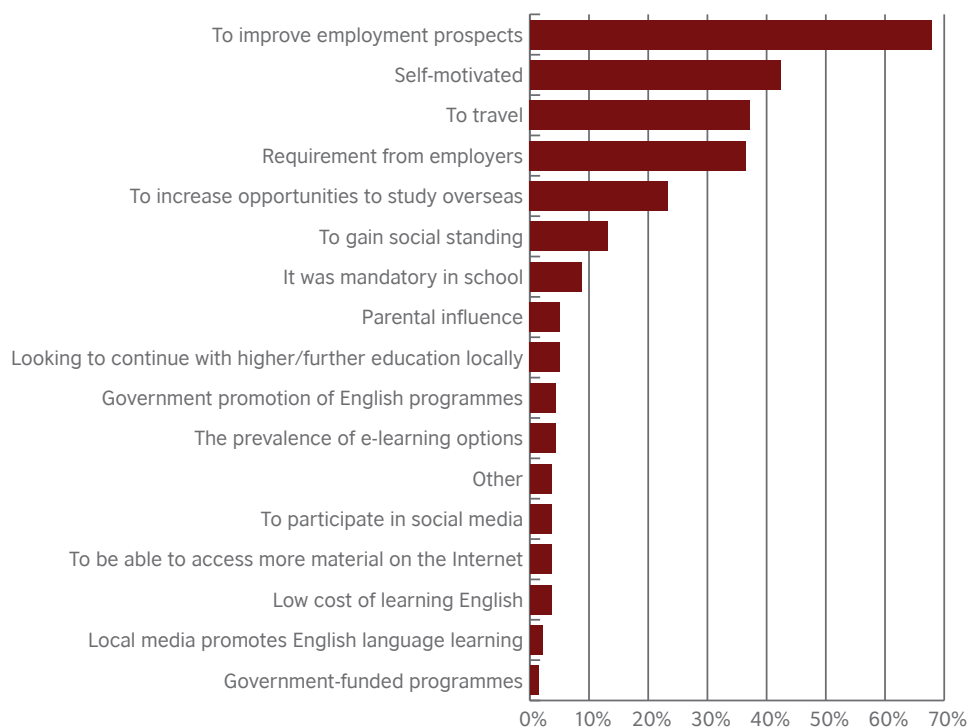
## Top industries that offer English training and development

Education/language training	67%
Financial services/investment/real estate/insurance	50%
Health-care/medical/pharmaceutical	50%
Distribution/logistics/transport/wholesale	26%
Food manufacturing/processing/food services/catering	25%
Hospitality/entertainment/restaurants	17%
Non-food manufacturing/engineering/processing/packaging	17%
Agriculture/mining	11%

We asked respondents whether their companies offered in-house professional English language training or development. Only 17 per cent of respondents indicated that they offered English language training. The industries that were most likely to offer English language training included education and language training (67% of respondents), financial services, investment, real estate and insurance (50%) and health-care, medical and pharmaceutical (50%). Interestingly, just 17 per cent of respondents in the hospitality, entertainment and restaurants sector offered English language training, while no respondents in the utilities and energy sector did so. The most common methods of delivering English language training were internal training, offering financial support for training, or partnerships with external English training companies.

## Employers' views

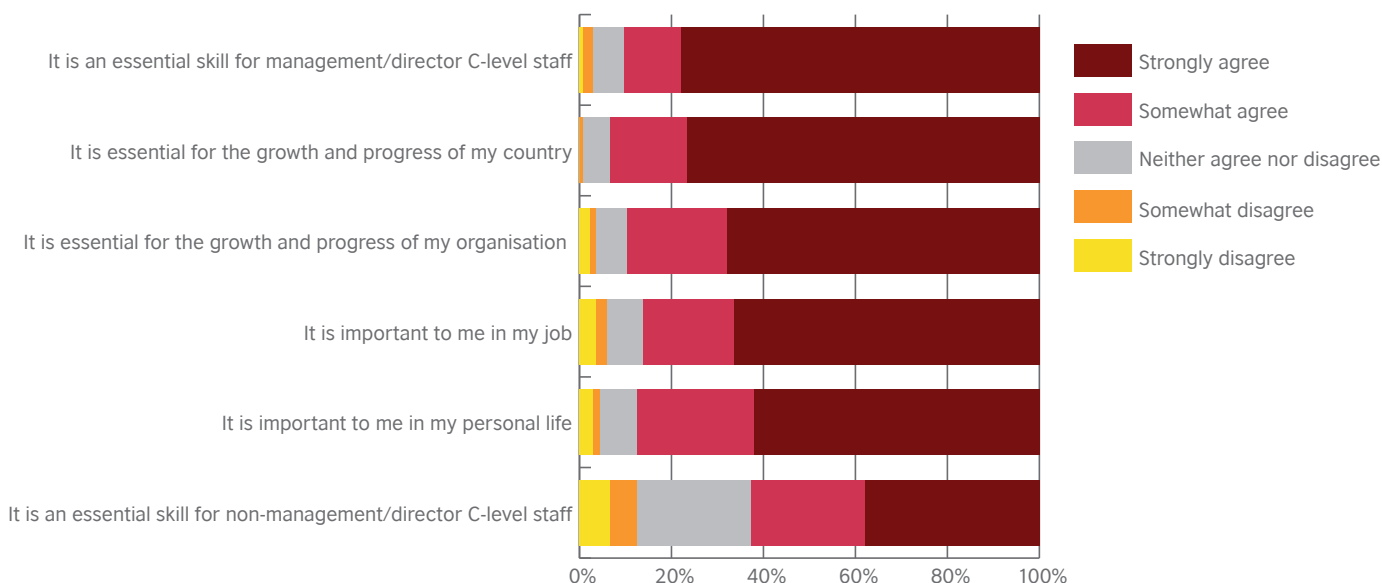
We asked respondents their personal views (as opposed to general company views) on the main reasons for Peruvians to want to learn English. Respondents could choose up to three responses.



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

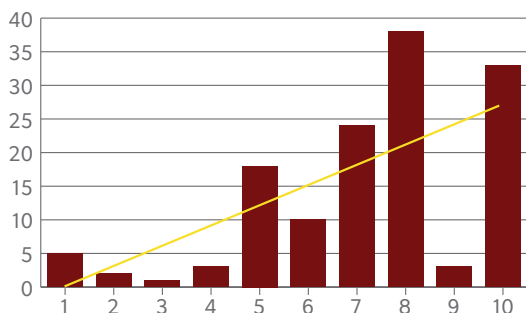
The view reported the most often was that Peruvians learned English to improve their employment prospects (68%). This mirrors the findings of our general population survey. A large share of employers (42%) believed that Peruvians learned English for personal motivations, while further large shares reported that English language learning was motivated by the opportunity to travel (37%) or by employer requirements (36%). These findings reiterate the importance of learning English for personal reasons, such as travel and self-improvement, as well as for employment.

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



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

These findings illustrate some key differences in the perceptions of English acquisition in Peru. The statement that received the most support was that English is an essential skill for managerial staff (78% of respondents strongly agreed). By comparison, just 38 per cent of respondents agreed strongly that English was essential for non-managerial staff. This highlights that managers have very different expectations of their staff in terms of English skills; however, it also highlights the importance of English as a gatekeeper for high-level employment, and that managers may be looking increasingly to improve their English skills in the future (18% of management-level respondents had no English skills and 26% reported their skills as ‘basic’). There was also a lot of agreement on the importance of English for national growth and progress: 77 per cent of respondents strongly agreed with this statement, and no respondents strongly disagreed with it. Respondents also largely agreed that English plays an important role in their jobs and personal lives as well as in company growth.



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

We asked employers to rate the importance of English knowledge on a scale from one (not important) to ten (essential). The largest shares of respondents, by a long measure, rated English as ‘very important’ (8) or ‘essential’ (10), and very few employers (4%) rated English as ‘not important’ (1).





# Factors affecting English language learning

There is high demand for English language learning in Peru, and people are aware of the benefits of learning the language. Demand is driven by a number of factors, including enhanced employment prospects, the ability to communicate with more people, access to a wider range of information sources and the opportunity to pursue a better education.

To make English accessible in Peru, the government needs to support the creation of high-quality, low-cost provision, which it aims to do through the development of the public education system. The biggest barriers to learning English include geographical location, poverty, parental education level and gender. Most importantly, however, it is where these inequalities intersect that children become most disadvantaged in terms of school access, progression and outcomes.

## Income inequality

Our survey results indicate that there is a significant correlation between income and English language learning, and that cost, together with a lack of time and access to government-funded programmes, is the biggest reason for not having learned English.

Rising disposable income and increased government spending on social programmes have meant that Peru's middle class is expanding, growing by 16.7 per cent between 2008 and 2013 to 1.9 million households. However, the majority of the population still belongs to the lowest socio-economic groups: groups E and D represented 45.3 per cent and 26.3 per cent of the population aged over 15, respectively, in 2013. As such, income inequality is high, and there are stark contrasts between the spending patterns of rich and poor households: in 2013, the richest ten per cent of households accounted for 50 per cent of all spending on education.<sup>25</sup>

Having disposable income increases the ability to afford highly desirable English language classes as well as private education, where teaching quality, resources, facilities and learning outcomes are better. As such, low-income households largely rely on the public education system, which lacks the funding for adequate infrastructure and resources, including qualified teachers. Teachers often cannot afford to obtain mandatory English language qualifications owing to the high cost. To address this access gap, current government policy is focussing on English language learning in public schools.

English is becoming increasingly necessary in Peru, and parents encourage their children to learn a foreign language, English in particular, in order for them to increase their education and employment prospects. Perceptions of enhanced employability, including access to management-level positions, drive the upper and middle socio-economic groups to learn English, but there is also a link with cultural appreciation, including films, music and online media. People who lack pathways to quality education are less likely to see English as a vital tool for communication, and their education and employment aspirations, in terms of gaining managerial roles or university places where English is required, may be lower. Low-income groups are more likely to prioritise spending on food, transportation and other necessities over learning English.

The significance of socio-economics is reflected in Peru's poor PISA results, which were reinforced by the country's own national assessment of reading and mathematics skills. These assessments highlighted general inadequacies in reading and mathematics proficiency; however, outcomes were by far the lowest for children from rural, indigenous communities, and the PISA results show that students' socio-economic characteristics have a much greater effect on learning gaps in Peru than in other countries, even when low-income students attend the same schools as their richer counterparts.<sup>26</sup>

Consumer spending accounts for 32 per cent of total expenditure on primary education and 33 per cent of secondary spending. Household expenditure varies significantly with poverty incidence, geographical location and economic status. Parents are also more likely to spend on education in parts of the country where public expenditure is also high, and public expenditure is lower in areas where poverty rates are high. This highlights the deep-rooted inequalities in the education system.

<sup>25</sup> Euromonitor

<sup>26</sup> "Project Appraisal Document On A Proposed Loan In The Amount Of US\$25 Million To The Republic Of Peru For A Basic Education Project." World Bank. 14 Dec 2014. Retrieved at <http://documents.worldbank.org/curated/en/2012/12/17124697/peru-basic-education-project>.

The World Bank identifies Peru as having one of the least affordable tertiary education systems in Latin America compared with high-income countries, and while this finding is based largely on responses from private universities, high tuition fees and living costs and a lack of financial assistance are significant barriers to higher education for many.<sup>27</sup> While accessibility is not necessarily correlated with affordability, accessibility is also reported to be low in Peru. As English language learning opportunities may increase during or in preparation for higher education, barriers to tertiary study for lower-income groups may be a further determinant of English language learning.

## Multicultural population

Peru's multiethnic, multilingual population has been a key influencing factor in the drive for inclusive education. While commitment to intercultural education is high and progress has been made, it is not yet a reality. While recognising and catering for linguistic diversity is important, there are sizeable achievement gaps between the Spanish-speaking majority and groups that speak minority languages. Socio-economic inequalities are related to ethnicity as well as to geographical location, meaning that these factors also influence access to language learning.

Many indigenous groups want the same opportunities and access but at the same time want to preserve their own culture. To improve communication and learning, it is advantageous for teachers to originate from the local community; however, these teachers are in short supply. As a result, minority groups often don't have the same level of access to language learning and other educational opportunities. Critics of inclusive programmes for indigenous communities report that these programmes are not methodical enough and push children to run before they can walk: it is necessary to address basic problems and provide a solid knowledge foundation before promoting 'non-essentials' such as English language learning and study abroad, which may be alien for children who in some cases do not even speak Spanish.

## Geography

Peru has a diverse landscape that is typically broken down into three regions: the *costa* (coast) to the west, which is a narrow plain, largely arid except for valleys created by seasonal rivers; the *sierra* (highlands), which is the Andean region and includes the Altiplano plateau as well as the country's highest peak, Huascarán, at 6,768m; and the *selva* (jungle), which is a wide expanse of flat terrain covered by the Amazon rainforest, which covers almost 60 per cent of the country. These regions are home to diverse ethnic groups, many of which speak various languages and dialects. The Amerindians that live in the Andean highlands speak languages such as Quechua and Aymara and are ethnically distinct from the various indigenous groups that live on the eastern side of the Andes and in the tropical lowlands adjacent to the Amazon basin. Peru's distinct geographical regions reflect a language divide, with Spanish predominating in the coastal region and more diverse, traditional languages prevailing in the mountains and highlands. East of the Andes, some indigenous groups retain their traditional languages while others have almost completely adopted Spanish. There has been an increasing and organised effort to teach Quechua in public schools in areas where Quechua is spoken.

There are further divides between urban, rural, remote-urban and remote-rural regions, many of which have seen long periods of neglect in terms of public attention and funding. Private schools tend to be clustered in urban areas, and non-local teachers may not be well received in some parts of the country. Peru's geographical extremes mean that some parts of the country are remote and largely inaccessible. Students may choose to live in towns and cities close to the jungle or the mountains or move to coastal cities to gain better access to urban amenities. The remoteness of many areas and isolation of some communities means that it is difficult for non-urban students to practise English within or outside the home, presenting further obstacles to language learning and acquisition.

Various NGOs are active in different parts of the country, including *Enseña Peru*, which is part of the Teach For All network and recently launched a programme that brings together young graduates with good English skills and international certification to teach in underprivileged areas of the country. These graduates are salaried and work for up to two years.

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<sup>27</sup> Murakami, Yuki, and Andreas Blom. "Accessibility and affordability of tertiary education in Brazil, Colombia, Mexico and Peru within a global context." *World Bank Policy Research Working Paper Series*. 2008.

## English reforms

Historical reforms and laws have had limited effect in Peru, owing to poor implementation or funding and frequent changes in leadership. The current government has made and continues to make significant investments in public education to enhance access to English language learning and aims to create an English/Spanish bilingual state by 2021.

The government is developing grants and scholarships to send teachers abroad in order to improve English language skills, including fluency and vocabulary. It has also signed agreements with the British government and US institutions to send public English teachers abroad for three weeks of English language and methodology training. Foreign English teachers are also being invited to teach and train in Peru. In another development, a partnership with the Euroidiomas Institute has resulted in 4,000 teachers being trained nationwide, including via an online training platform.

In 2015, MINEDU promised to increase the number of hours dedicated to English language learning from two to five per week in the public sector, with the aim of providing more time for practising, role playing and speaking. This change will initially be implemented in 1,000 schools but should expand over time to cover all schools. Another initiative should see the development of scholarships for children from disadvantaged backgrounds to attend high-performance schools, where at least ten hours of English tuition will be provided each week. The government is also working to make more online learning opportunities available for those in rural areas or who have less time for language learning.

Initial plans to introduce English in primary schools have been met with concern by proponents of inclusive education, who fear that this will overburden schools in indigenous communities. Similarly, others fear that the reforms are generally too short-sighted and divert the focus from the vital task of ensuring quality education and raising numeracy and literacy overall. Other challenges for the new reforms include bureaucracy, corruption, nepotism and a lack of supervision.

## Teacher training

MINEDU's greatest challenge is training English teachers. The government has prioritised this area and is addressing it in part through partnerships with UK and US universities. There is a shortage of English teachers, and this shortage can be expected to increase if English is made mandatory from primary level. Teachers need to be trained not only in new tuition methods but also in how to incorporate them successfully into the reform initiatives. Currently, many teachers work as English language educators without having the appropriate qualifications. Teacher training can also be improved by enhancing university-level curriculums.

Teacher salaries are low and are often a driver of strikes. Low pay requires teachers to supplement their income with other teaching and non-teaching jobs, meaning that they only fulfil the minimum requirements of their teaching roles. The government has opposed salary increases owing to the significant impact that this would have on the education budget. Low salaries have reduced the appeal of the teaching profession and teaching often attracts low-quality candidates, perpetuating the cycle of inadequately trained teachers teaching future generations. Efforts are being made to break this cycle, and the government is working to revive and transform the image of the teaching profession.

## Technology

English language learning both enables and is facilitated by interaction with technology, and many acknowledge the link between the two. Technology allows access to films, music, gaming and social media, which our survey results showed were essential means of improving English language skills. Cities located close to the jungle and in the mountains are beginning to connect globally through fibre-optic broadband, although issues such as electrical storms can cause problems with Internet connectivity in these areas, particularly in winter.

Technology has only recently begun to play a bigger role in education in Peru. Since 1996, a number of small-scale independent programmes, mainly targeting secondary schools, have been implemented. These programmes typically involved funding for ICT equipment but required investment from participating schools, excluding those that lacked resources. In 2001, a new ICT-related education programme, Huascarán, was implemented. This became one of the most publicised initiatives of the newly elected government. It was devoted to learning ICT skills; however, increased ICT access did not necessarily translate into greater use of ICTs in subjects such as maths and languages. Between March and June 2004, 350 secondary schools were selected to receive an ICT package that included electrical infrastructure, ten computers and network installation; this scheme was funded by a loan from the Inter-American Development Bank (IDB). The One Laptop Per Child (OLPC) programme has been rolled out almost completely in Peru. A test deployment in 2007 was followed by a massive deployment of 800,000 devices in 2010, and today, more than one million OLPC computers have been distributed to children in Peru. The impact of this project on education quality is under debate.

In its latest reform, MINEDU aims to introduce blended learning software in the first 1,000 secondary schools identified for early implementation. There have been increased efforts to make more tuition available online, including providing English courses online, in order to reach a wider audience. While many are used to traditional methods of language learning (just 8% of the managers surveyed had used e-learning to study English), others find it difficult to come to classes, either because of distance or a lack of time. Digital English language learning platforms enable students to register for and access different courses and tutors online. Some private schools already offer in-house online training services for businesses that allow employees to study English in the workplace, and people who work in remote areas in particular, such as in the mining sector, are starting to see the value of e-learning. Another current project aims to provide Portuguese lessons online through a local university, targeting 500 students initially and expanding to around 10,000 students in the future.

## Data collection

Data collection has not been consistently prioritised in Peru, reflecting frequent changes in leadership and policy. National statistics are often not available, making assessment and benchmarking a challenge. There are limited national education statistics, and a school census contains incomplete and undeclared data and covers higher education but not university-level education. Official data that has been computerised is difficult to collect in rural areas. MINEDU's Quality Measurement Unit has some of the best available data and conducts census evaluations of numeracy and literacy. Data collection and testing have been further inhibited by a MINEDU law enacted in 2014 that states that students cannot be evaluated for entrance purposes.

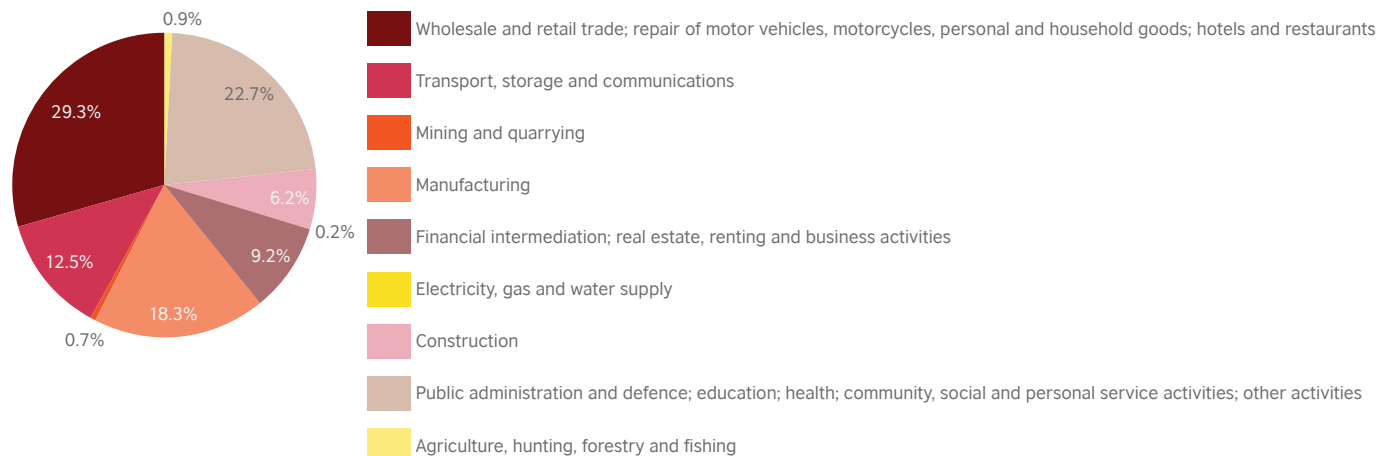
## Economic development

Peru's abundant natural resources have fuelled a healthy mining sector that has attracted foreign investment, and Peru's appeal is increased further by its low wages compared to regional neighbours. In 2013, foreign direct investment (FDI) amounted to five per cent of GDP, slightly higher than the Latin American average of 4.8 per cent. Supported by buoyant investment, the economy is expected to grow by 5-5.5 per cent annually over the coming years. Productivity is low, stemming from the existence of highly labour-intensive manufacturing industries. The energy, mining, oil and retail sectors are major industries with links to English-speaking partners and providers, including the US, South Africa, Australia and Canada, and Peruvians with good English skills are in high demand in these areas.

However, skilled labour is in short supply and limitations in educational attainment could hinder economic progress in the long run, as could a lack of innovation capacity and the presence of a large informal sector. While international companies tend to have the means and motivation to provide English training for employees, local businesses continue to struggle to accept the need for English and are resistant to the idea of English training as they see it as an expense instead of an investment. Despite significant progress in key areas, Peru's small English-speaking workforce limits its ability to tap into lucrative global markets.

MINEDU is receiving input from different government sectors as it formulates its latest education reforms, including the Ministry of Commerce and Tourism, which aims to develop language skills that will help promote the growth of tourism. The number of travellers to Peru has increased from one million to three million tourists per year, meaning that there is more exposure to the English language than ever before, and it is becoming more advantageous for locals to speak English in the popular cities of Arequipa, Cuzco and Lima. As Lima evolves as a regional and international centre, its business services sector is expanding rapidly. Between 2007 and 2012, employment in this sector grew by 14 per cent; IT-related and business process outsourcing services have been among the biggest growers, albeit from a low base. Some of the major call centres in Lima include Atento, Fortel, Aegis and Transcom. This sector benefits from Peru's robust technology infrastructure and native Spanish speakers, although it is also prevented from moving into new markets by a lack of English speakers.

### Employment by industry: 2013



Source: Euromonitor

## Employability

The results of our general and employer surveys show that English proficiency is widely seen as a means of enhancing employment prospects. Securing a better job was third main reason why English learners had learned English, and getting a better job was the top motivator for non-learners to learn English. These views were seconded by employers, who agreed strongly that English was necessary for managerial jobs and national growth as well as in their personal lives. As such, English can be seen as a gatekeeper for high-level employment and an increasingly important skill when going for a job. We also found that while 39 per cent of Peruvians learned English to improve their employability, just nine per cent learned it because it was necessary for their job. From this we can infer that Peruvians take a proactive or pre-emptive approach to English as a job-related skill.

While in-house training exists, just 17 per cent of the companies we surveyed offered English language training. In the past, businesses required certification as proof of English proficiency. Today, however, prospective employees are more likely to be required to demonstrate their skills, sometimes to the point of conducting interviews in English. Job sites and newspapers frequently advertise positions at multinational companies where English skills are required, publicising the demand, whether real or imagined, for English language skills.

English language skills are increasingly important for the government as it looks to maximise labour market productivity as the population ages. It is important to ensure that those entering a very competitive job market have access to high-quality education that will equip them with the skills needed to succeed.

## International experience

While a wide range of scholarships and opportunities for studying abroad is available to Peruvians, access to such programmes increases with English language skills: prospective students that can fulfil international testing requirements and competently complete international scholarship or college applications are more likely to be successful.

The number of students taking Cambridge exams through private providers has tripled in recent years, and student mobility is growing, particularly at postgraduate level. There are many incentives associated with scholarships, and the benefits are being promoted from an academic perspective through scholarships such as those offered by the Fulbright Commission. Private educational institutes such as ICPNA also offer scholarships for their best students.

MINEDU offers scholarships, such as BECA18, which is awarded to low-income, high-achieving secondary students to pursue undergraduate education. This programme has been awarded ISO 9001: 2008 certification by the International Organisation for Standardisation, reflecting the high degree of transparency in its solicitation, selection and award procedures at the national level. BECA18 students are bound to return home from three years upon completion of their studies.

Only 15 per cent of Peruvian students who study abroad study in countries where Spanish is not the medium of instruction. As such, Peruvians with English skills have a greater opportunity to secure PRONABEC scholarships, which include access to fully funded programmes at the world's top 400 universities for high-achieving students. The President's Scholarship Programme currently provides support of up to US\$40,000 for 1,004 high-achieving undergraduate and postgraduate students, who are monitored to ensure standards are maintained. A new English language programme and scholarship fund for non-English-speakers features an 18-month intensive English programme that aims to raise students' skills to a level that will enable them to complete international master's degree programmes; 700 places are available for undergraduates that have completed their studies, and there are quotas for different regions.

# Opportunities

In recent years, Peru has seen rapid economic development, and the government is now channelling significant resources into a new English language reform that aims to ensure universal access to English language learning. Barriers to uptake currently include Peru's unique multicultural and linguistic make-up as well as a historical lack of consistency in education reforms, which has allowed education inequalities to persist. These issues are being addressed by the government. An awareness of the issues, barriers, gaps and opportunities in this market may be advantageous for market observers, and we summarise these points below:

- technology has been lauded as an integral part of English and general education reform, but issues remain regarding the viability and effectiveness of online programming
- there is a shortage of English teachers, and those who are certified generally need further language and methodology training to meet the aims of current reforms, including increasing English language teaching hours in schools
- English is mandatory at secondary level even in areas where Spanish is not the first language, potentially overburdening already vulnerable communities
- scholarships are widely available to Peruvian students, but many cannot take advantage of them as they lack or fail to perform in international English qualifications; as such, demand for exam preparation is increasing
- certain industries, including ICT and tourism, are growing and are in need of English language speakers

# Conclusion

English is widely accepted as a language of business in Peru, and the government aims to improve proficiency so that domestic businesses can flourish and economic growth can continue. Improving the skills of the workforce is particularly important as the population ages. Historically, the approach towards education and English language reform has been highly fragmented, reflecting frequent and dramatic political changes. However, in recent years momentum has increased and Peru has now set a goal of bilingualism in Spanish and English by 2021.

The current language reform aims to provide quality provision at low cost through the public education system. By forging partnerships with foreign governments, universities and international organisations, Peru aims to boost English language teacher training by introducing innovative teaching methods and materials. The government is also partnering with foreign institutions to send Peruvian teachers overseas for training as well as to attract native English teachers to Peru. The country has a shortage of English teachers, and this shortage will become more acute as the government looks to increase the number of required English language instruction hours per week in secondary schools. The government is hoping to incentivise potential new teachers and transform the image of the teaching profession, although issues such as large class sizes, under-resourced schools and low salaries will need to be addressed. The government is also working with other ministries to ensure that English language education meets the needs of high-demand industries such as business, commerce and tourism.

The new policy of English language learning will run alongside programmes designed to preserve culture and language in indigenous communities, which have often achieved or are working towards bilingualism in a mother tongue and Spanish. There is a sizeable gap in education attainment between the large Spanish-speaking majority and minority linguistic and ethnic groups, often with a geographical dimension. The issue of inclusive, intercultural education is prominent and means that attitudes towards English vary.

Among the biggest barriers to English language learning is income inequality: cost is often cited as a major deterrent to studying English, as is limited access to government-funded programmes. While the wealthy and the growing middle class may be able to afford English language classes and private schools, where quality and outcomes are better, low-income students are largely reliant on the public system, particularly in rural areas. Our survey results show that interest in English among the general population and employers is high overall, and English is often associated with increased employability, as well as improved quality of life and access to education opportunities. However, without a solid education foundation, low-income population segments are less likely to see English as a valuable tool for communication, particularly as they often have to prioritise necessities such as food and transport. Poor and highly unequal PISA results indicate that there is an urgent need to address the education challenges faced by the country's underprivileged students, particularly in rural, indigenous communities.

English language learning is likely to continue to underscore Peru's goal of improving its position in the global economy. The country hopes to further exploit its abundant natural resources through its robust mining sector and comparatively cheap labour, thus attracting considerable foreign investment. However, a lack of innovation capacity, a large, labour-intensive manufacturing industry and the continued presence of a significant informal sector are contributing to low productivity. Areas such as tourism and business services have been identified as high-potential growth sectors, but skilled labour, including workers with strong English skills, is in short supply. It is hoped that English language levels will increase as reforms are implemented and the trend for overseas study, particularly at postgraduate level, strengthens. Similarly, English language learning through technology is seen as a potential means of reaching the communities most in need of socio-economic gains.