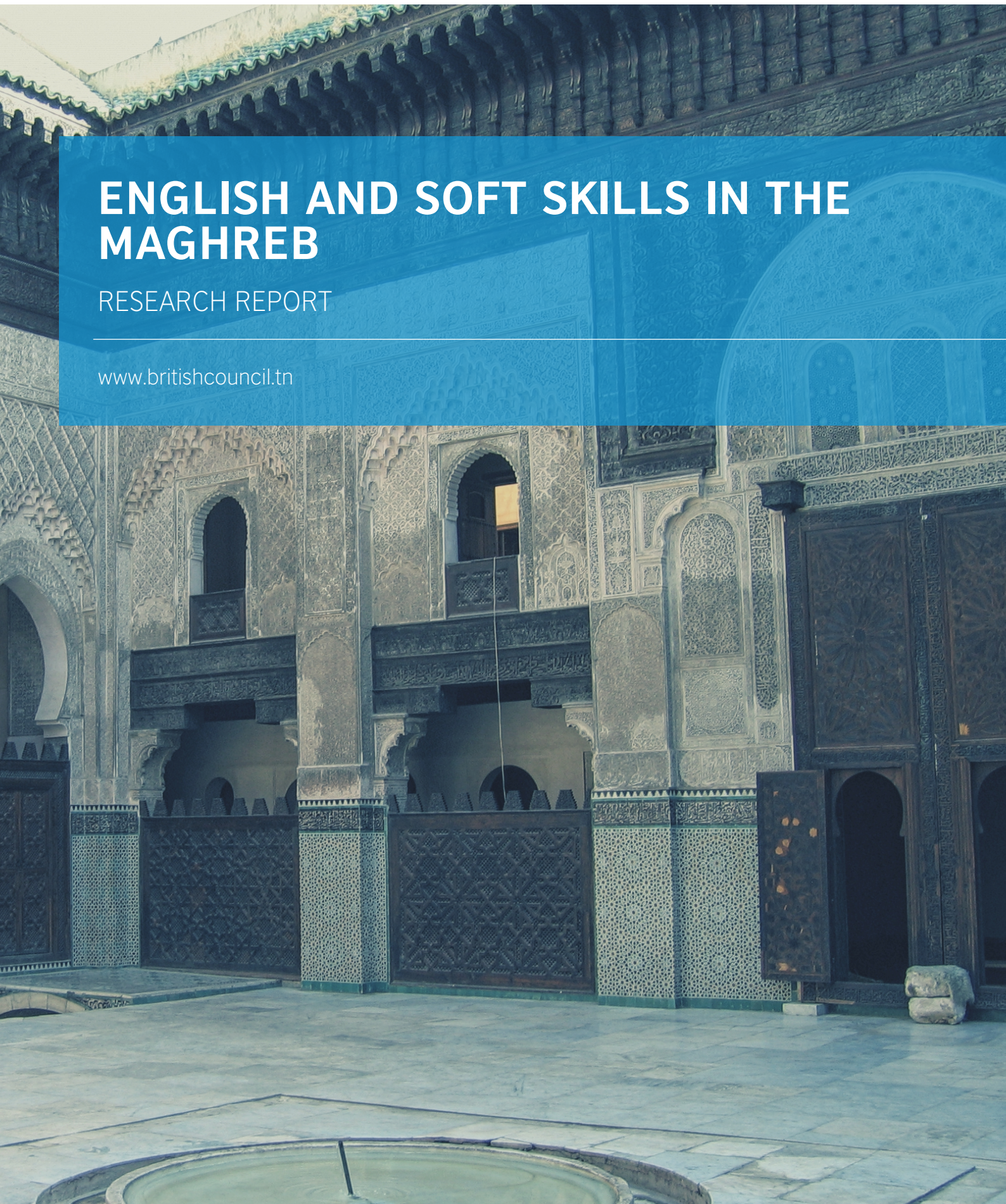


ENGLISH AND SOFT SKILLS IN THE MAGHREB

RESEARCH REPORT

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This Report was commissioned by the British Council and prepared by Carfax Educational Projects.

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Preface



The countries of the Middle East and North Africa region, and in particular the Maghreb, currently suffer from very high youth unemployment of up to 30 percent. At the same time, employers often struggle to find candidates with the skills needed for the jobs on offer. Languages – in this case English – as well as soft skills have been identified as key skills needed to enable young people to improve their employability.

Against this background, the British Council has commissioned this research to start to measure current levels of English in Algeria, Libya, Morocco and Tunisia, and determine to what extent supply is meeting demand. We'd like to thank Carfax

Educational Consultants, who have carried out this initial research, basing their findings on both desk and field research.

Building on the recent British Council-commissioned research, *The Relationship Between English & Employability in MENA*, this report looks at government provision of English in the Maghreb states. It also explores the levels of English and soft skills that are required by a range of employers in each of the countries. The report ends with a number of practical recommendations to be considered by the national education systems concerned, as well as by education advisers and providers in the Maghreb, the UK and elsewhere.

We hope this report will be a useful further step in helping policy makers and educators better understand current needs and provision of English and soft skills in the Maghreb countries and its key role in improving youth employability. This report should also serve as a catalyst for debate to identify initiatives and solutions for English and soft skills that address some of the key causes of current high unemployment levels in this strategically, economically and culturally important part of North Africa.

Robert Ness

Director British Council Tunisia
and for the Maghreb

September 2016

Acknowledgments

The completion of this report would not have been possible without the participation, help, support, and feedback provided by a great number of individuals across the different organisations as well as countries in which the background research for this study was undertaken.

A special thanks belongs to the previous Director British Council Tunisia, Nigel Bellingham, for the research idea and to Kiros Langston for coordinating the research.

The author would also like to thank the English Project Managers within the British Council, namely Kathryn Kelly from British Council Morocco, and Deirdre Nicholas from British Council Algeria, whose assistance and cooperation was crucial for the finalization of the research.

The author is also grateful to all those that have kindly given their time without requesting any recompense whatsoever in the interest of carrying

out, this, in many ways, pioneering research in the region. Especially the representatives of the Ministries of Education and Higher Education in Tunisia and Algeria, representatives of all the different universities, both private and public, which were interviewed, as well as their students, who kindly attended one-on-one interviews and focus group sessions.

Last but not least, thanks is also due to a range of employers and their representatives, who were interviewed in the course of this research, and whose insight into the labour market, and years of valuable experience helped to shape the practical recommendations included within this publication.

Though many of those listed above were extensively involved in the completion of this study and the publication of the report, any mistakes, typos, and omissions remain the responsibility of the author alone.

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Introduction

Project background

The region of North Africa is experiencing some of the highest youth unemployment rates in the world. On average, 29 percent of young people are not in education, employment or training (NEET) (International Labour Organisation, 2014). Some countries, such as Tunisia, have reached a youth unemployment rate as high as 42 percent (*ibid.*). Analysis carried out by the World Economic Forum in 2013 has established a number of leading causes for youth unemployment worldwide:

- **High population growth rates**, which is particularly pertinent to the North African Region.
- **Economic Crisis**, which has affected young people in particular as they are the 'last in but first out'.
- **Discouraged youth**, who are unable to find employment for extended periods of time, eventually stop looking;
- **Lack of national comprehensive policy framework**, only 35 out of 138 countries surveyed by the Forum have adopted action plans to combat youth unemployment; and
- **Deficiencies of labour, market institutions, and policies**, where stringent labour market regulation discourages companies from hiring inexperienced

staff, as well as young people's lack of sufficient skills and abilities required for the types of jobs available on the market.

Two of the deficiencies of labour that have potentially had a significant impact on the ability of young people to find employment within North Africa are a limited ability to speak English and a general lack of business-related soft skills. In order to establish the link between these two, as well as to help propose a range of effective interventions to individual governments and educational institutions in their effort to develop a comprehensive policy framework, market institutions, and policies, the British Council has commissioned Carfax Educational Projects to carry out in-depth research and industry needs assessment of English language and soft skills across four major markets in which it operates. These are: Algeria, Libya, Morocco and Tunisia.

During the completion of this assignment, the British Council has also developed and delivered another research report, written by Elizabeth Erling, which looks extensively at the relationship between English and employability in the MENA region (Erling, 2016). This report may be of significant interest to the reader of this report, as it focuses very closely on related areas of research and offers data

and analyses that complement the findings of this report.

Project objectives

The objectives of the project are to deliver a comprehensive study,

founded in available research and data, as well as carry out further primary research during the later phases with a range of stakeholders in country to clearly outline:

- The Common European Framework of Reference (CEFR) level of English of final-year graduating university students in Algeria, Libya, Morocco and Tunisia.
- The CEFR level of English required by a range of typical employers in Algeria, Libya, Morocco and Tunisia.
- The soft skills required by a range of typical employers in Algeria, Libya, Morocco and Tunisia.
- The gap between the current levels of English and soft skills of university students in these countries, compared to the levels of English and soft skills required by employers.

Source: Project Terms of Reference

Staging and aim of the report

To deliver on the objectives outlined above, the project is further sub-divided into three discrete stages:

Stage 1

This report is the principal output delivered during stage 1 of the project. Its aim is to compile existing research on the level of English and soft skills in Algeria, Libya, Morocco and Tunisia, referencing contents based on existing, available reports and data. Furthermore, this report aims to set the stage for the following stages of the project by outlining preliminary methodology and proposing a range of research tools to be used for data collection.

Stage 2

The second stage of the project will be focused on in-country and field research in order to find answers for the project's objectives in Tunisia, Algeria and/or Morocco. As part of the second stage, further analysis of data will be carried out.

Stage 3

The last stage of the project is dedicated to analysis and synthesis of the data collected, drafting of the final report, and development of pertinent recommendations and/or interventions for the British Council with regards to issues identified concerning local clients, institutions and government entities.

Definitions

CEFR

In order to effectively address the questions raised by the terms of reference, it is important to clearly define the terms mentioned in it. The primary focus of the evaluation of English language level is the basis of the Common European Framework of Reference for languages (CEFR). This is a framework developed by the Council of Europe, and used throughout the continent, and increasingly overseas, to provide a

method for a common evaluation of language ability for all European languages. It is commonly used for assessing an individual's language proficiency in any given language (Council of Europe, 2014).

The framework uses a number of indicators, across the core language speaker competencies such as listening, speaking or writing to assess the speaker's level. On a global scale, the descriptors for each of the reference levels, according to the framework, is the following:

GLOBAL LEVEL	LEVEL CODE	HOURS REQUIRED	DESCRIPTOR
PROFICIENT USER	C2	1,000 – 1,200	Can understand with ease virtually everything heard or read. Can summarise information from different spoken and written sources, reconstructing arguments and accounts in a coherent presentation. Can express him/herself spontaneously, very fluently and precisely, differentiating finer shades of meaning even in more complex situations.
	C1	700 - 800	Can understand a wide range of demanding, longer texts, and recognise implicit meaning. Can express him/herself fluently and spontaneously without much obvious searching for expressions. Can use language flexibly and effectively for social, academic and professional purposes. Can produce clear, well-structured, detailed text on complex subjects, showing controlled use of organisational patterns, connectors and cohesive devices.
INDEPENDENT USER	B2	500 - 600	Can understand the main ideas of complex text on both concrete and abstract topics, including technical discussions in his/her field of specialisation. Can interact with a degree of fluency and spontaneity that makes regular interaction with native speakers quite possible without strain for either party. Can produce clear, detailed text on a wide range of subjects and explain a viewpoint on a topical issue giving the advantages and disadvantages of various options.
	B1	350 - 400	Can understand the main points of clear standard input on familiar matters regularly encountered in work, school, leisure, etc. Can deal with most situations likely to arise whilst travelling in an area where the language is spoken. Can produce simple connected text on topics which are familiar or of personal interest. Can describe experiences and events, dreams, hopes and ambitions and briefly give reasons and explanations for opinions and plans.
BASIC USER	A2	180 - 200	Can understand sentences and frequently used expressions related to areas of most immediate relevance (e.g. very basic personal and family information, shopping, local geography, employment). Can communicate in simple and routine tasks requiring a simple and direct exchange of information on familiar and routine matters. Can describe in simple terms aspects of his/her background, immediate environment and matters in areas of immediate need.
	A1	0	Can understand and use familiar everyday expressions and very basic phrases aimed at the satisfaction of needs of a concrete type. Can introduce him/herself and others and can ask and answer questions about personal details such as where he/she lives, people he/she knows and things he/she has. Can interact in a simple way provided the other person talks slowly and clearly and is prepared to help.

Source: (Council of Europe, 1989)

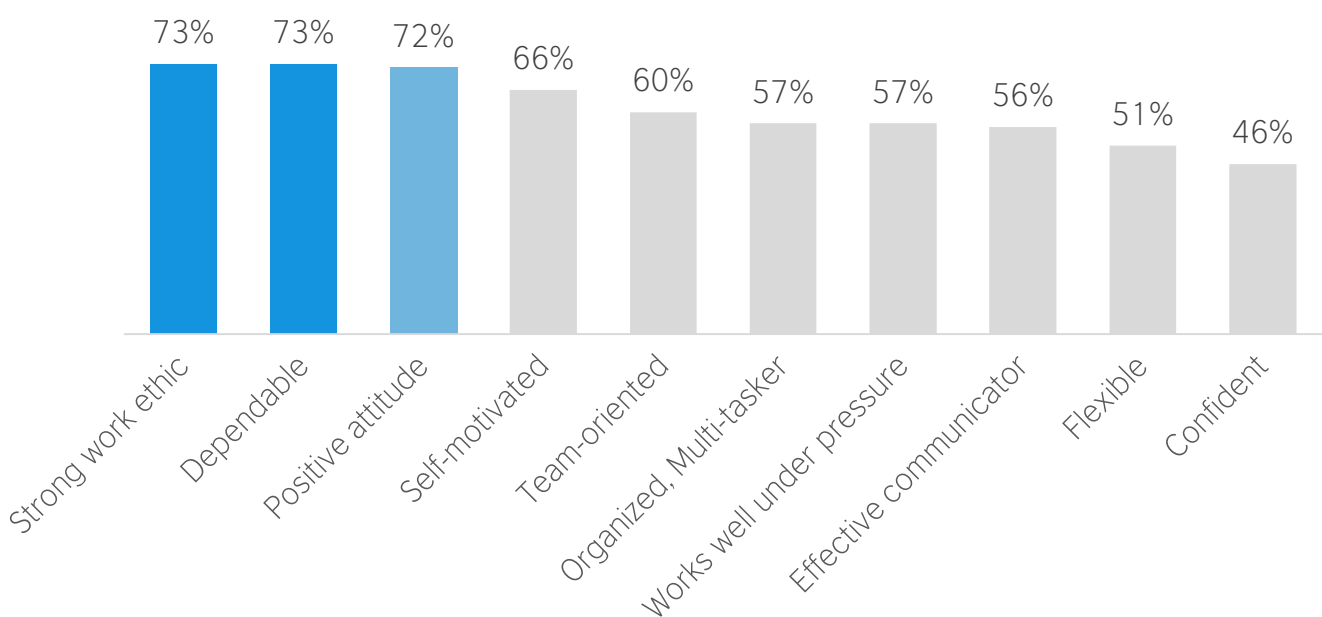
Soft skills

The definition of ‘soft skills’ varies greatly in literature. The definition that appears most often, however, is one where a dichotomy is established between ‘hard’ skills (technical subject knowledge, and practical abilities) and ‘soft’ skills, which can encompass practically anything from a range of skills and abilities related to an individual’s emotional intelligence and personality traits, to motivations and preferences that are valued in the labour market (Pritchard, 2013) (Heckman & Kautz, 2012). There are a number of studies that have specifically shown some evidence of the positive correlation between the presence of certain personality traits, later-life outcomes and labour market performance, even when controlled for intelligence (*ibid.*). However, the establishment of causality between soft skills and

employability remains elusive (*ibid.*) and certainly beyond the scope of this initial study.

What matters here, however, is perception. Regardless of soft skills’ objective impact on an individual’s success in life and employment, what matters is that there exists a general conviction on the part of the employers that these skills are essential for an employee’s ability to effectively carry out their job (Caudron, 1999). As such, soft skills play a significant role in a candidate’s evaluation during their interview and hiring process with a potential employer (Schawbel, 2014). In a recent (2014) survey of over 2,000 hiring managers and human resource professionals across industries and company sizes in the United States, the top ten most popular soft skills that companies said they were looking for in new hires were:

Figure 1: 10 Most Sought-After Soft Skills According to Recruitment Managers and HR professionals in the USA



Source: (CareerBuilder, 2014)

Although the study mentioned above engaged HR and recruitment professionals from different industries, it is important to note that 'soft skills' play a more prominent role in employability of young graduates in some industries than in others (Andrews & Higson, 2010). In particular, service and retail jobs, quite understandably, tend to value soft skills much higher than jobs where specific technical knowledge is required for effective completion of the job (Nickson, et al., 2011).

In terms of the implications of these complexities for the relevant definition of 'soft skills' for the purposes of the desk study, it is important to note two things:

First, 'soft skills' are understood as traits, skills and abilities pertinent to a person's emotional intelligence and personality. They tend to be regarded as discretely separate from technical abilities by employers. When mentioning soft skills throughout this study, the author has in mind the examples of concrete skills such as the ones from the CareerBuilder (2014) study. This may be further supplemented by additional skills that may be important to the particular labour markets in question, during field research and surveys carried out as part of the additional stages of this assignment.

Second, provided that soft skills have varying levels of impact on a candidate's employability, depending on a particular sector and position, due caution is advised in interpreting future recommendations. In particular,

regarding interventions to address soft skills deficiencies, with regards to the prevalent industries and companies within each of the countries' economy. However, one of the key characteristics of developed economies tends to be the size of their service sector, and relatively lean agricultural and primary production sectors. Furthermore, success in managerial and senior positions in companies, even within the lower economic sectors, is also strongly positively correlated with soft skills. Studies of almost 500 organisations worldwide have indicated that people with higher emotional intelligence and soft skills progress faster to the top of such corporations (Caudron, 1999). As such, in order for the local population within the four economies examined to begin to occupy top-level positions within foreign, and increasingly, domestic companies, a general aim to improve the level of soft skills in recent graduates can only have a positive effect.

Rationale for the study's objectives

In an effort to better understand the factors contributing to high graduate unemployment, the research and analysis presented here focus explicitly on the areas of English language capabilities and soft skills abilities of recent graduates within the four countries selected. The British Council deliberately selected this objective as it is one where it possesses a significant competitive advantage and long-term expertise, and can

thus assist local stakeholders in implementing effective interventions. Furthermore, with a broader aim in mind of understanding the challenges faced by the economies in focus, from the perspective of supply and demand of labour, English language and soft skills have some impact on the quality of labour supply. They can

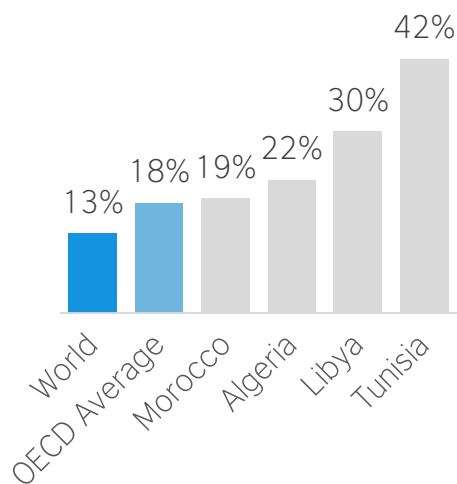
(in a broader sense of contributing to the economic development of a country, which is further explored in a separate chapter) contribute positively to creating new demand for labour. Besides addressing 'hard skills' deficiencies, structural and regulatory factors contributing to high levels of youth unemployment is beyond the scope of this study.

Executive summary

Key findings

The youth unemployment rate in North Africa remains one of the highest in the world, reaching 29 percent on average in 2014 (International Labour Organisation, 2014). In some countries, such as Morocco, up to four out of every five unemployed people are aged between 15 and 34 (Guardian, 2014). Figure 2 illustrates these points in comparison with the OECD and world average youth unemployment rates.

Figure 2: Youth Unemployment Comparison Chart (2014)



Sources: (International Labour Organisation, 2014), (OECD, 2015), (Hajj, 2013)

The general causes of youth unemployment are outlined in detail above, based on the research carried out by the World Economic Forum. Further analysis of existing research for the four countries, and with specific attention to English

language and soft skills, has identified some additional information specific to the North African region.

First, French colonial history has left a significant legacy in the North Africa region, with French remaining strongly positioned as the second language of choice for the majority of learners. The persisting importance of the French language worldwide, and its history in the region, have significantly limited the motivation of local graduates to pursue studies of an additional lingua franca (Idrial, 2014).




Second, though some changes are evident, particularly in Morocco, the public sector remains one of the largest employers within each market; employing approximately 70 percent of the formal workforce (European Training Foundation, 2014). As such, the public sector's importance with regards to driving conditions of labour demand is significant. Yet the hiring requirements for public sector positions remain largely bereft of incentive and accountability structures, thus effectively proliferating a situation where the largest employer in the country hires on the basis of quotas, regulations and, in some instances corrupt practices, rather than by an objective and meritocratic system rooted in skills or competencies (DPADM-DESA, 2004). Anecdotal evidence collected during stakeholder interviews supports this, with all participants admitting there are no official English

language requirements for new or existing employees. Such practice has undoubtedly exacerbated the general level, and drive towards, better English language and soft skills.

Regardless of these challenges, the region has seen progress in attainment of the young population in terms of their English language abilities, and positive changes have been occurring in the tertiary education sector, with a shift towards a more critical approach to learning, implementation of partnerships among universities and potential employers in an effort to close the youth employability gap (Zuabi, Vanessa, 2012).

The British Council's own research into the prevalence of soft skills within the Maghreb has also uncovered certain skills gaps among young Maghrebis that further increase the distance between employer requirements and young graduates' abilities. This is a factor that likely contributes to the difficulty of young Maghrebi graduates finding and maintaining employment.

The interviews and surveys that were carried out among a range of stakeholders in three out of the four Maghreb countries (no interviews could be carried out in Libya due to security concerns), included some of the largest employers in the region. Companies in the telecommunications, automobile or recruitment consultancy industries, have highlighted the following three soft skills as most sought-after by employers in the region overall.

	Dependability
	Strong work ethic
	Self-motivation

These three soft skills differ from the top three for the whole of the MENA region, as is further detailed below, though are not completely inconsistent with the findings of other surveys.

The interviews carried out in each individual country further support the findings, as many employers interviewed claimed that while often very confident and with relatively sufficient technical competency in the areas of their intended careers, young Maghrebi graduates were often perceived as lacking punctuality, orderliness and ownership of their own work.

The stakeholders interviewed introduced a number of successful initiatives that are already being piloted in the Maghreb. Together with best practices developed around the world for English and soft skills development, some of which are described herein, they offer a unique opportunity of building on the lessons learned from such initiatives. They also support the broader developmental trends and labour market initiatives across the relevant geographies. Through partnerships, management of projects and driving of local actors' engagement, the British Council, as well as local stakeholders, can play a vital role in assisting local people in closing the

youth employment gap in the region.

English language skills and employability

The value English language skills have in terms of increasing an individual's employability has, until recently, been largely based on perception. However, contemporary research shows some evidence that there exists a positive correlation between English language proficiency and country-level economic development, job creation and personal financial gain, in countries with well-functioning systems. This is beyond the scope of this initial study (Erling, 2016).

Additionally, the social value that an English speaker has, given that most English speakers are assumed to have been educated in fee-paying private schools, is an attractive quality to employers in the region, despite the common acknowledgement that English will not often be used in the workplace (*ibid.*).

Country-specific findings

Algeria

Graduates' English levels

Studies have indicated that only seven percent of the Algerian population speak English to at least an intermediate (B1/B2) level, while between 2009 and 2013, average TOEFL exam scores were between 73 and 75; marginally above the B1/B2 boundary score of 72.

English proficiency required by employers

Although deemed to be at least somewhat important by 60 percent of respondents, Algerian employers tend to value English language proficiency primarily when hiring for front-office roles, managers and employees with transnational responsibilities.

Further, English proficiency is not rigorously evaluated, as aside from undertaking part of the interview in English, most employers do not utilise a formal assessment measure to gauge a candidate's English abilities.

Soft skills required by employers

British Council research indicates that the top three soft skills, as demanded by Algerian employers during the recruitment process, are: dependability, team-orientation, and strong work ethic.

Soft skills gap

When analysing the gaps between the soft skills required by employers and the number of graduates with these skills, the largest gaps identified pertained to dependability, problem solving and team orientation skills.

Libya

Graduates' English levels

Between 2009 and 2013, TOEFL scores in Libya dropped from 77 to 73, which is equivalent to a CEFR level of B1/B2. Also, Libya consistently ranks among the bottom five countries in English First's English Proficiency Index.

English proficiency and soft skills required by employers

Along with heavy regulation of foreign businesses, the limited foreign investment in an unstable political and economic climate have largely eliminated two key drivers of demand for both English proficiency and soft skill development in Libya.

The largest employer is a public sector that hires based primarily on quotas and regulations. Hiring decisions based on merit and skills competencies are largely non-existent, which negates any incentive to develop soft skills.

Morocco

Graduates' English levels

Studies show that approximately 11 percent of Moroccans speak English at an intermediate (B1/B2) level. Further, between 2009 and 2013, TOEFL results were between 77 and 79, corresponding to a CEFR grade of B2.

Morocco ranked 55th out of the 63 countries measured in the EF EPI, though the results of the EF EPI are not without challenge, the ranking puts Morocco higher than any of its Maghrebi counterparts.

English proficiency required by employers

More than 50 percent of respondents to a British Council study claimed that only a minority of graduates possess the level of English demanded by employers.

In general, English language proficiency is only loosely evaluated by conducting part or all of a candidate interview in English.

However, in the IT and telecommunication sectors - both strong contributors to Morocco's GDP - more than half the employment opportunities require candidates to possess adequate English language skills.

Soft skills required by employers

During the recruitment process, the priority soft skills employers demanded from candidates were strong work ethic, positive attitude and client friendliness.

Soft skills gap

The largest gaps identified between the soft skills demanded by employers and the number of graduates with these skills pertained to organisational skills, strong work ethic and dependability.

Tunisia

Graduates' English levels

64 percent of graduates in Tunisia have an elementary or lower intermediate level of English.

English proficiency required by employers

Employers in Tunisia designated English language proficiency as essential for job interviews, front office jobs, roles in transnational corporations, managerial positions and career advancement in general.

However, English language requirements have been defined not by the CEFR, but rather on a candidate's ability to carry out a spoken job interview, either partly or fully in English.

Most employers believe that, at best, only a minority of job candidates possess the basic language requirements necessary to carry out interviews in English.

Soft skills required by employers

The most important soft skills, as identified by Tunisian employers, comprise self-motivation, effective

communication and strong work ethic.

Soft skills gap

The three soft skills identified as in need of most development among job seekers were client friendliness, effective communication and dependability.



English language, soft skills, and economic growth

The primary assumption that underlines this desk study is one of a causal link between the development of English language and soft skills and economic growth. Yet the evidence for the causality between these two factors is rather limited, due to both the scarcity of data (in particular in the Maghreb region) as well as the challenge of proving a causal relationship (Erling, 2014). Nonetheless, provided that these are skills pertinent to the labour force, their effect on a country's economic growth can be justified only in so far as they affect the productivity and utilisation of labour. If it can be shown that the development of soft and English language skills affects labour demand and supply positively, a reasonable argument can be made about their positive impact on the overall economy.

Prior attempts to explore the causality between English language skills and employability neglected some crucial aspects of the relationships. It has proven particularly difficult to separate the impact of improved English skills on employability as a distinct and discrete factor, separate from the quality and quantity of a person's education (Erling, 2014) (Coleman, 2011). This is due to the fact that good quality English language

tuition is almost always provided as part of overall higher quality education provision, preventing the researchers from separating the influence of English language skills as a discrete variable (Aslam, et al., 2010).

Secondly, some studies about the promotion of English as an international lingua franca (Ku & Zussman, 2010), especially in post-colonial contexts in parts of Africa and in Asia, revealed that English language capability is not necessarily conducive to a higher level of economic development (as measured by GDP) (Arcand & Grin, 2013). Arcand and Grin (2013) find that, contrary to common belief, in the economies they examine, knowledge and use of a local language is likely to be met with a higher per-capita income and thus conclude that multilingualism¹ can be beneficial to economic development. This is also due to the fact that educational provision in English often acts as an additional barrier for local populations to access higher quality education (Schellekens, 2001) (Pinnock & Vijayakumar, 2009) (Graddol, 2010).

Furthermore, in assessing the economic impact of learning, English language is further limited in the sense that it may be fairly simple

**multilingualism
can be
beneficial to
economic
development**

¹ Arcand and Grin understand multilingualism in this context as the use of more than one language by a community of speakers. It may arise from

a range of factors such as a country having a different official and business language, immigration, etc.

to assess a person's actual language competence but much more difficult to assess the impact of a gain of fluency on the person's employability, and even more so in isolation from other soft as well as hard skills (Coleman, 2011).

Though it may have been difficult to consider English as a factor in isolation, 'in recent years, however, research has managed to show that in specific circumstances English does indeed have an impact on individuals, in particular industrial sectors and at the national level' (*ibid.*). There are a number of empirical studies that support the validity of the positive correlation between English skills and individuals' employability. The study, most often quoted in this case, supported through sociolinguistic as well as quantitative economics, found that in Switzerland:

'English language skills are associated with significant earnings gains on the [...] labour market. [...] The wage difference for the top level of competence can exceed 30 percent, which is remarkably high. Even at low levels of competence a little English is always associated with higher earnings.' (Grin, 2001).

Furthermore, at industry level, there are documented examples of where particular industries have experienced a geographic shift to certain economies, partly due to the English skills of workers within those countries. To mention selected examples here, call centres and banking back-office operations have been relocating en masse to

countries such as India at least in part due to their level of education and English competence (Doh, 2005) (Roggeveen, et al., 2007).

On a *national* level a high level of business English proficiency plays a significant role in the decision of a foreign company to invest or expand into a particular economy (Blomstrom, 2006). 'This is related to the fact that many multinational companies use English as their in-house business language, as well as the fact that many foreign direct investments outside Europe are American' (*ibid.*). A similar effect, but in the context of the French language, and French cultural, legal and societal heritage attracting francophone businesses, is still observed today at least in parts of the Maghreb (Association International de Techniciens, Experts et Chercheurs, 2014).

The overarching conclusion of these studies, however, is that the broad stroke approach of assuming causation between improved English language skills and economic development is of limited value. A more nuanced approach to the implementation of English language skills for employability is required. It is necessary to consider particular:

'types of economy and particular sectors of activity. For example, it has been suggested that service economies are most likely to have a widespread need for English language skills, whilst in manufacturing economies it may be that only a relatively small number of personnel concerned with international

trade will require English' (Coleman, 2011).

Lee's (2012) findings summarise these conclusions by concluding that English proficiency (as measured by TOEFL test scores) can be seen as a necessary but not sufficient condition for GDP per-capita increase and economic growth. He finds that:

English proficiency will have a positive impact on economic development if the increase in English proficiency is complemented with a minimum threshold of physical capital, technology, political stability, good governance and other factors. The improvement in English proficiency without sufficient accumulation of physical capital, technology and social capital will not add significantly to the economic development of a country (ibid.).

The implication of these findings on the English language policy within the Maghreb is one of carefully planning for appropriate development. It is necessary that any wide-reaching English language initiatives consider the broader economic and commercial sector needs, as well as the existing educational provision within local populations, in order to achieve desired outcomes and to avoid introducing further barriers to economic development. In the words of Erling (2014), 'investment in English alone is not likely to result in economic growth if not accompanied by other measures'.

The relationship between soft skills and employment is also rather complex. Measuring the impact of these skills on a person's employability and hence the demand and supply of labour is challenging for similar reasons. Not only is there a lack of consensus regarding the definition of such skills, but even where a constricted list of characteristics and traits is considered it is difficult to control for their impact, as discrete traits separate them from all others on the same list and beyond.

Currently, minimal research exists exploring the correlation between soft skills and economic growth. Although, similar to the conclusions about the relationship between English language skills and economic development, researchers have marked soft skills as necessary to fuel faster development and estimated, at least partly, the contribution that these skills can have to the economy. The lack of soft skills is perceived to have the following negative impacts on a country's business sector (Coughlan, 2015):

- Increased operating costs
- Losing business to competitors (domestic, and foreign)
- Problems meeting quality standards
- Delays in introducing new products and services
- Poor customer satisfaction and lower customer retention

The value of such skills, for example in the British economy, has been

estimated to be worth up to £88bn per year (*ibid.*). Some have gone even further to suggest that an inadequately skilled labour force, also in terms of their soft skills, is ‘a major constraint to private sector job creation and business development, especially in high knowledge sectors’ (AfDB-BAfD, 2011). Thirty-seven percent of firms in Algeria and 31 percent of firms interviewed in Morocco have cited this reason as the major constraint to their business development within the region in a World Bank Enterprise Survey (*ibid.*).

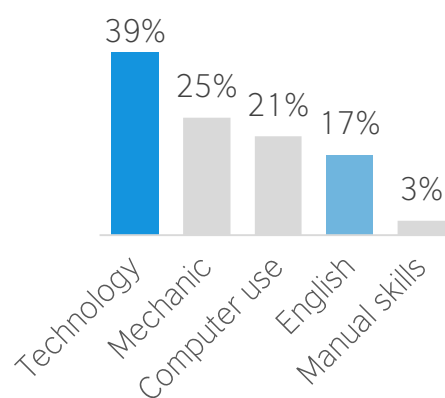
Although the Maghreb economies in focus may be less reliant on the service industry and high-knowledge sectors than their Western counterparts, their potential to realise economic growth can be significantly hampered in the long-run regarding foreign investors and the expansion of these relatively higher-margin industries in the future, should they fail to address these shortages. Rather than a causal factor of further economic growth, lack of soft skills thus represents a barrier to increased employability, and in turn lower economic growth potential, as employers’ cost increase and full revenue potential is not realised.

A recent study by the World Bank carried out in Sri Lanka, though geographically removed from the region in focus, but similar in many aspects of its own economic development, illustrates an important point about the dangers of the skill gap for economies that face it. The study found that ‘About 77 percent of workers actively use

teamwork skills and 50 percent presentation skills. However, Sri Lanka’s education and training system does not do much to shape soft skills. This implies an urgent need for curriculum revision.’ (Dundar, et al., 2014).

Furthermore, the study has also established a wage premium for workers with different skill types.

Figure 3: Wage premiums by skill type






Source: Labour Force Survey 2000, 2004; STEP Household survey 2012

As can be seen from the graph, mechanical skills command a similar wage premium as English language and computer use skills (considered here as a soft skill), and a significantly higher premium than manual skills. The study concluded that ‘Sri Lankans with [...] soft skills like openness and emotional stability earn more than those without them’ (*ibid.*).

The general applicability of these findings to the Maghreb region is further supported by research carried out by (Bayt.com, 2015) (Bayt.com, 2015) (Bayt.com, 2015), as well as individual in-country

research compiled within this study by the researchers.

In the MENA region as a whole, Bayt surveyed almost 6,000 respondents between 2014 and 2015. The three skills most demanded by employers in the MENA region in 2015 were:

	Problem Solving
	Creativity
	Leadership

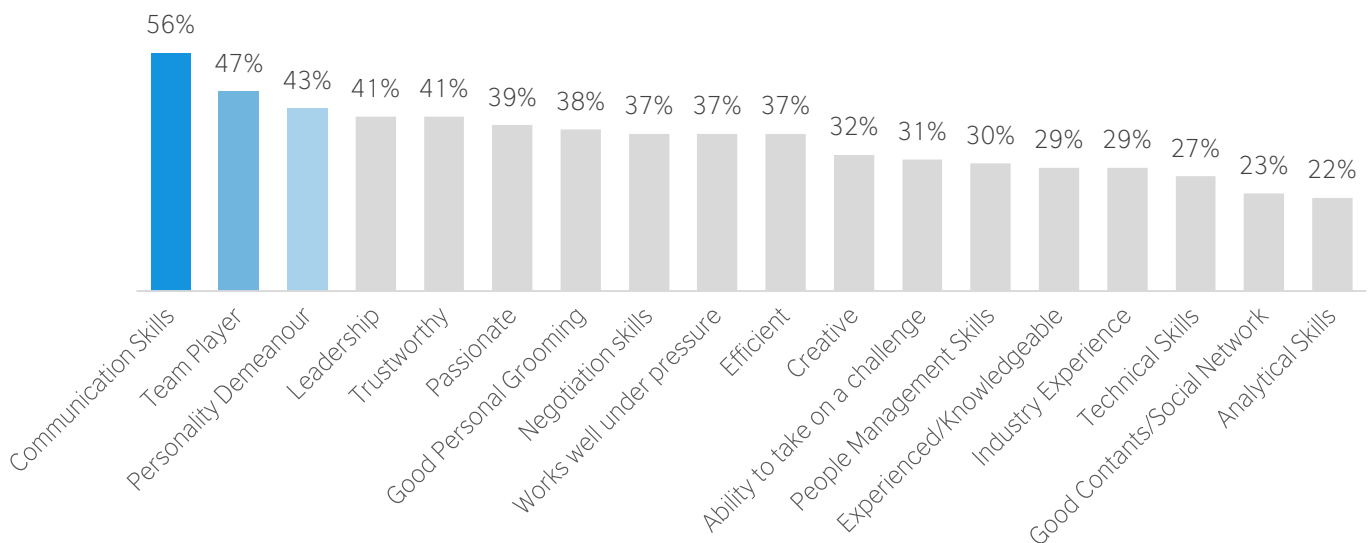
Source: (Bayt.com, 2015)

Additional evidence from Bayt research suggests some correlation between demand for creativity and level of economic development (Bayt.com, 2015a), which has further implications for the importance of these skills in the Maghreb in the long run as economic development continues.

Another assessment from the year before shows a similar selection of skills demanded by employers, though to different extents, with communication skills, team orientation and personality/demeanour most in demand. It is important to note that while the top skills may vary across regions as well as years, the overall selections of soft and personality skills demanded has shown remarkably little variation. This further supports the claim as to the necessity of their development within schools and corporate training centres.

Additional data collected during in-country research is presented in individual sections to substantiate the need for greater focus on the development of soft skills and English language skills as catalysts for sustained long-term job creation, improved employability and economic growth.

Figure 4: 2014 results of survey of most demanded soft-skills by employers.



Source: (Bayt.com, 2015a)

Desk research

Strong Arabic and Francophone heritage (in three of the four states) has produced an educational system that has traditionally fostered Arabic as the primary and French as the secondary language across the Maghreb. Levels of English language competence are low throughout the region (Romdhani, 2012), and compare poorly with other countries at the same level of economic development. This is an issue of increasing concern for policy makers and business stakeholders, mindful of the growing significance of the English language in a global economy, critical in strengthening trade with Europe and the Americas, as well as the (increasingly Anglophone) Gulf region (*ibid.*). In addition, with abundant reliance on tourism and service industries within the wider region, English language competency plays a significant role in ensuring that business is not lost of/to? alternative providers with greater strengths in this area (*ibid.*).

Academic literature on the region has noted a slow increase in the prominence of the English language within the Maghreb, developing in tandem with an increasing focus on Arabisation (Battenburg, 1997). This has been linked by commentators with both the increasing prominence of English as a global language of commerce and industry (as well as an increase in tourism throughout the region, recently facing disruption due to political instabilities) and the decline of France's significance in the

region both culturally and economically (*ibid.*), though the increasing French military presence in wider North Africa may potentially slow this trend. Some commentators have highlighted the perceived 'neutrality' of English, unconnected with the colonial history of the region. They posit the view that this has increased the popularity and prominence of English language teaching in past decades (Ennaji, 2013). This trend has been furthered by an increasing level of student mobility, with large proportions of students from the region opting to pursue studies overseas (a third of MENA students studying abroad are from the Maghreb) (Formation Continue du Superieur, 2015), many of them in English-speaking countries or universities. This in turn has contributed to a growing diaspora, particularly of skilled workers, within English-speaking countries (Natter, 2014). This is likely to increase the prominence of English further in the future, though this trend may be slowed by increasingly stringent visa requirements (*ibid.*) in Europe and North America.

As such, there has been a growing emphasis on the teaching of English throughout the region (Battenburg, 1996), both within state school settings and in private sector English language schools. However, the latter's role has been undermined in some parts of the region as a result of heightened instability and a growing perception that the terror threat is increasing in certain cities. This has undermined

the extent to which native speakers of English can be drawn on as a resource in certain areas within some national contexts in the region. This potential for instability (Jalloul, 2014) has heightened international interest in the region, and it is possible that this may result in allocation of Western-backed funding for English language

programmes within regimes considered to be stabilising forces.

Against the context set out above, this study seeks to provide a succinct overview of the English language and soft skills landscape, and historical context, within the Maghreb region, and shed light on current and anticipated future trends in the sector.

Algeria



Country and economy overview

Name:	People's Democratic Republic of Algeria
Official language(s):	Standard Arabic, Tamazight (Berber)
National language(s):	Tamazight (Berber)
Spoken language(s):	Algerian Arabic, Berber, French, Hassaniya, Korandje
Population:	38,813,722 (July 2014 est.)
Capital:	Algiers
Key industries:	Oil and Gas, mining, quarrying, construction, public administration, wholesale and retail trade
GDP per Capita (PPP):	\$14,300 (2014 est.)
Mean Monthly Salary:	\$1,520 USD (2015 est.) (DZD 150,000)
GDP growth:	4% (2014 est.)
Unemployment:	Regular: 9.7% (2014 est.) Youth: 22%

Overview of Educational System

Mandatory years of education: **9 years**

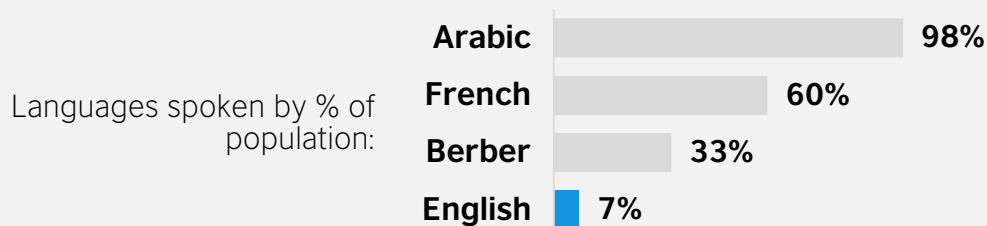
% of university graduates: **13% (2010 est.)***

Language of instruction: **Algerian Arabic, French**

First year of compulsory English instruction: **6th**

English contact hours by year 12[°] **Est. ~600 – 700 (B2/C1 equivalent expected outcome)**

English contact hours by completion of bachelor's degree[°] **Est. ~900 – 1,100 (C2 equivalent expected outcome)**



* There are approximately 8 million primary, middle school, and secondary learners (British Council research) and 1,2 million additional university students (European Commission, 2012), university graduates thus represent ~13% of all learners.

° Please note that the estimates are based on latest education policy available, and local knowledge of British Council staff. The total number of contact hours varies largely by stream and subjects studied. The differences between programmes are even more prominent at tertiary education level, where certain students will have no compulsory English lessons, while students reading towards the Bachelor degree in English language may have 25+ hours a week.

Sources:

(International Labour Organisation, 2014),
(Salary Explorer, 2015), (World Fact Book, 2015),
(OECD, 2015), (Hajj, 2013),
(Euromonitor International, 2012),
(WENR, 2006)

Education system overview

Primary education in Algeria is free and compulsory for all children aged six to 18. Out-of-school children used to be a substantial problem for the Algerian education system, with as many as 220,000 children not attending school ten years ago. Today this number has decreased by almost 90 percent (Unesco Institute for Statistics, 2015). Even at post-primary level the situation has much improved over the last decade. The country now achieves almost 98 percent secondary enrolment and almost 35 percent of all eligible students were enrolled in institutions of tertiary education in 2013 (*ibid.*).

In the 9th year of schooling, students sit the National Final Exam; those who perform poorly can be required to continue their studies until the examination is passed. This has resulted in wide variation in the age of children at the upper levels of schooling.

Poor academic performance at the upper levels of study (above year 9) can also lead to 'la déperdition scolaire' (students dropping out of the school system). This appears to have impacted many children in Algeria, so much so that the Ministry of National Education has undertaken a range of initiatives in recent years to address this issue. One of the core initiatives comprises technical and vocational training for dropouts, seeking to ensure that a lack of secondary education does not impact negatively on employability.

Having achieved good results in terms of access to education,

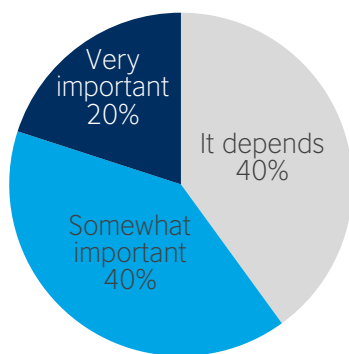
Algeria now focuses on improving its quality, which has suffered somewhat as a result of a rapid increase in student enrolment, and hence declining student-to-teacher ratio over the last ten years, and for which Algeria has been criticised (North Africa Post, 2015). The areas of further teacher training and professional development have been identified as particularly pressing for the advancement of the education sector in the country (*ibid.*).

Perceptions of English

The perception of English among Algerians suffers somewhat at the expense of French, which has traditionally been used as the language of business and public affairs pertinent to its colonial past (British Council, unpublished). Despite that, the interest in English language tuition has been rising recently, mostly due to the shift in perception among young Algerians that English improves employment prospects, particularly with oil and gas companies in the country (*ibid.*).

Indeed, when asked, local stakeholders have ranked the importance of English for the ability of a young graduate to secure entry-level employment as follows:

Figure 5: How important, do you consider, is English today for a young graduate in securing an entry-level position in your country/organisation?



Source: British Council research

Though the research only allowed for a limited number of organisations to be approached, these represented some of the largest employers in the country across the telecommunications, automobile and consultancy sectors. Furthermore, the employers who have responded 'it depends' have all noted that the level of English required for a young graduate looking for a position is very important if they seek a position within a *front office* of a business, and much less important for graduates willing to work in the *back office*.

Additionally, reforms driven by the Ministry of National Education in cooperation with the British Council are underway, seeking to improve the English language competence of students between the ages of 12 and 18 (*ibid.*). The British Council has sought to support the Ministry through: implementing a competency-based approach to language teaching in government

schools; training Ministry inspectorates; rewriting curricula and textbooks; and improving systems of assessment and evaluation. Given the recentness of these initiatives, impacts have not had time to mature.

English has become a national priority for the Algerian government, which has recognised that:

'Improved employability, increased access to scientific research and the ability to retain and attract foreign direct investment can be best achieved by the strong implementation of English education in the country. This has led it to introduce new curricula for primary and secondary education.'

(Euromonitor International, 2012).

Though the society at large may still show scepticism towards learning English, the employers have already shown a clear preference for it. British Council researchers have spoken to some of the largest employers in Algiers, including one of the country's leading telecommunications provider, automobile manufacturer and a leading HR consultancy. All employers approached have expressed their dissatisfaction with the current level of English among graduates they have interviewed.

Gaps in English language abilities

Perceptions of improved economic opportunity, as well as growing exposure to social media, appear to

have begun to drive an interest in learning English among younger Algerians. Perceptions of English promoting better economic opportunity appear to be (to some degree) justified, with some research findings noting a pay gap of around ten percent in favour of those with English language skills (Euromonitor International, 2012). Similarly, there appears to be a growing interest in the development of 'soft skills' among Algeria's young, with much of this demand being driven by young Algerians seeking to gain employment in the larger export-focused sectors (*Ibid.*).

While national levels of English language ability within Algeria remain difficult to establish with certainty, a number of indicators cast some light on current English language competency levels among Algeria's young. A recent study indicated that only seven percent of the Algerian population spoke English to at least an intermediate (B1/B2) level (*ibid.*). However, these statistics should be approached with a significant degree of caution, given they rely largely on self-reported measures of English language ability, and not on invigilated external assessments (MacIntyre, et al., 1997) (Shameem, 1998). As such, the actual levels of English competency may well be lower than these findings suggest.

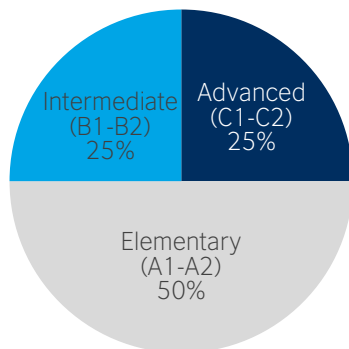
TOEFL exam scores offer some additional insight into the English language ability of prospective undergraduate and postgraduate students seeking to study in English-speaking countries: scores were between 73 and 75 between

2009 and 2013 (ETS, 2009, 2012, 2013); scores very close to falling below the B1-B2 boundary score of 72 for TOEFL examinations (ETS, 2015). That these exams are likely taken by the stronger students in the country calls raises further concerns the standard of English among Algeria's average students.

English First's English Proficiency Index (EPI) can also offer some insight into the current standard of English among those in Algeria with an internet connection: Algeria ranks 60th out of 63 countries included in the study, and 9th out of 11 in the MENA region. Admittedly, some issues around the robustness of findings emerging from the EPI exist, with non-invigilated examinations informing the data set, and potentially unrepresentative samples. However, both of these factors would largely be expected to raise national performance on the EPI – examinees are largely thought to be younger, more technologically capable and more urban; all groups that are demonstrably more capable in English than many of their national counterparts (Euromonitor International, 2012); again, this suggests that the findings may in fact over report current levels of English language competency.

The British Council's own research in Algeria, though limited in scope, has confirmed the lower levels of English proficiency of first-time job applicants. Interviews of some of the largest employers in the country to gauge perception of English language levels among new graduates was as follows:

Figure 6: What level of English do you consider are most applicants to your institution at graduation?



Source: British Council research

Business trends in Algeria have begun to show some indications that the current standard of English is not adequate for the needs of industry and commerce, with operations becoming increasingly hampered by these limitations. All employers interviewed by British Council researchers reported that, at most, a minority of the candidates they came into contact with had the English language skills they required.

The petroleum sector in Algeria is arguably one of the largest and most important sectors of the economy, comprising c. 37 percent of GDP (World Bank, 2015; ADBG, 2012b) and 98 percent of exports. Most economic interaction with foreign actors, therefore, arises within the oil and gas sector, which is where the majority of demand for English language skills in the Algerian economy originates (Euromonitor International, 2012). Many commentators within the sector point to a serious shortfall of English language skills among

Algerians (*ibid.*) and substantial restrictions on importing foreign labour (PwC, 2013) as having serious and negative impacts on petroleum industry operations.

The Algerian economy remains largely closed to foreign investment due to its restrictive economic, tax, and investment policies (PwC, 2013); as such, the most growth within the country's economy originates in sectors driven by public expenditure (ADBG, 2012b). Industries and sectors that typically drive employer demand for foreign language skills within the region (e.g. tourism, banking, ICT) remain stunted by an inhospitable regulatory environment (PwC, 2013) (Turner, 2014b). This inhospitable investment environment also acts as a substantial deterrent to FDI – another key driver of demand for English-language skill (Ufier, 2013) (Euromonitor International, 2012). Taken together, these indicators point to limited demand for English language skills among Algerian employers outside extractive industries. The Algerian government has made some nominal commitments in recent years to opening the Algerian economy (World Bank, 2015b), and if these liberalisations do come to fruition it may begin to ease the economic situation currently limiting demand for English language skills. If these liberalisation efforts succeed, the Algerian economy will require a labour force with stronger English language and soft skills in order to attract and retain such foreign direct investment.

The reasons for the lower levels of English language ability in Algeria are likely many. It has been observed, however, both by the students, as well as British Council researchers, that the provision of EFL classes remains weak at many of the universities and institutions visited. Particular issues in educational provision were related to university administration and course delivery. In two large public universities visited by the researcher, classes were still not underway, even in late autumn, due to poor presence on the part of the teachers in classes.

Communication with students regarding schedules, class requirements and prerequisites was extremely poor, and essentially left entirely to the students to figure out on their own. Though these may have been isolated cases, in-depth focus groups with more than 100 local university students suggested that the lack of teachers' presence at university is a common occurrence in Algeria.

Any further reform and development of the EFL sector, especially at tertiary level, on the part of the government is thus likely to have very limited impact until the issues of teacher attendance is resolved.

What's more, students were not even adequately supported in independent learning at the Algerian universities visited by the researcher. One of the large public universities visited, having operated for a significant number of years, still lacked common access to the internet. The students who attended

the focus group expressed frustration at the difficulty to pursue learning independently, due to the lack of access to the internet provided by the university.

Teachers generally had low awareness of materials and resources available in the public domain and seem to have agreed that the lack of internet connection on the campus was neither unusual nor alarming. The standard of access to research journals, academic and study materials, commonly accepted as a basic prerequisite at most European universities, was completely lacking at most Algerian ones.

Students' chances to develop the language independently and to proactively seek to improve their employability are thus hampered by the relatively poor management of the higher education sector in the country and the lack of resources.

In terms of the largest impact of English for employability, the employers identified two potential areas as most crucial. All employers agreed or strongly agreed with the statements that:

- Ability to speak English fluently is a skill necessary for new employees to progress professionally within my organisation.
- Ability of young graduates to speak English has a positive impact on their chance to secure and keep employment within my organisation.

Analysis of most organisations interviewed revealed that English language requirements are not too stringent. Candidates are often assessed regarding their English abilities through undertaking part or all of the employment interview in the language, with no or little formal assessment required on the part of the employers. English was thus judged more important in the case of front office staff, employees working with transnational corporations, and for employees to progress within organisations into positions of middle or top management.

When approached about the potential remedial measures, both on the part of universities and the government for improving students' levels of English, the employers largely encouraged proactivity on the part of students and greater exposure to practical experiences as well as foreign exchanges:

The people who are doing the English programme, they should go abroad and get inspired by best practices and find what they should do in Algeria. They should find out more about how things work elsewhere.

Source: Employer interview

Soft skills gap

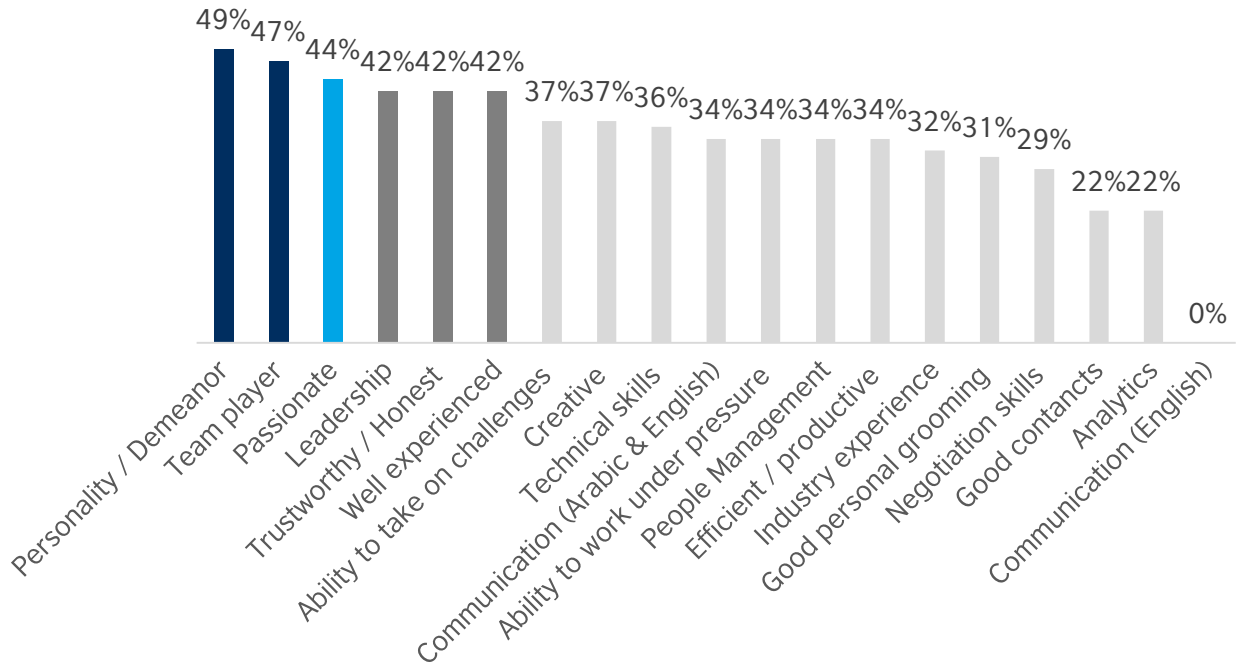
Data suggests that the education system in Algeria is failing to

provide appropriate skills to higher education graduates – the rate of unemployment among young people with university degrees is substantially higher than the rate of unemployment among those without tertiary education, with combined unemployment among young people standing at c. 30 percent (ETF, 2014). Appropriate professional skills development in Algeria, therefore, appears to be an area in need of further development.

While there is limited data available pertaining to the specific employer requirements for soft skills, a number of commentators point to a substantial lack of such skills among young people in Algeria (Aring, 2012) (King & Palmer, 2008) (British Council, 2013) (Burnett & Jayaram, 2012). This may point to some opportunity for those seeking to offer soft skills development opportunities to young people within the country. It is not that there exist limited opportunities for recent graduates to develop such skills on-the-job, it is more that the recent graduates' limited soft skills prevent them from successfully entering the job market.

In a recent survey carried out by Bayt.com, employers identified a number of desirable traits that they search for during candidate interviews. These are presented in the figure below:

Figure 7: Q. Which of the following requirements / factors do you MOST look for in a candidate? (Algeria)



Source: (Bayt.com, 2015), N=59

The British Council sought to supplement this survey through research of its own. Respondents from the ranks of local large-scale employers were approached to identify the key soft skills they look for in a candidate during the recruitment process. The figure below presents the top and bottom three responses of the study:

Figure 8: Q: During your recruitment process, how important are the following skills for your evaluation of the candidate (1 - not at all important, 5 - very important)?

Rank	Soft Skill	Average Score
1 st	Dependability	4.9
2 nd	Team-orientation	4.4
3 rd	Strong work ethic	4.4
...		
15 th	Works well under pressure	3.6
16 th	Entrepreneurship	3.4
17 th	Creativity	3.4

Source: British Council research

There are a number of key insights of the research worth mentioning within this analysis. First, all soft skills with the exception of creativity and entrepreneurship scored an average score above 3.5, which means that on average they were judged as at least somewhat important. Entrepreneurship and creativity represent a type of individual or self-driven soft skill, which are inherent to the candidate themselves, whereas team/collective-oriented skills (including dependability and team orientation) were ranked as most important overall. This perhaps suggests that young candidates in Algeria should focus on emphasising their team-oriented traits at the expense of their individualistic achievements and skills in job interviews.

When observing how many of the graduates exhibit these skills, the following results were obtained:

Figure 9: How many candidates in Algeria exhibit these skills (5 - all; 1 - none)?

Rank	Soft Skill	Average Score
1 st	Flexibility	3.9
2 nd	IT skills	3.6
3 rd	Positive attitude	3.4

15 th	Problem Solving	2.5
16 th	Entrepreneurship	2.5
17 th	Creativity	2.5

Source: British Council research

The analysis of the results points out that in terms of the employers' perception of graduates' skills *most* graduates (average score of 4) only

exhibit flexibility and IT skills. Beyond that, other soft skills were exhibited by at most *some* candidates (average score of 3). Problem solving, entrepreneurship, and creativity all scored very low with only a *few/some* (average score of 2/3) graduates exhibiting these skills.

It is also worth noting that 'technical knowledge of the subject', which was included in the skills on the survey as a reference point, received an average score of 3.6 – a score that would rank it on par with IT skills in Algeria. This means that most candidates for entry-level job positions in Algeria possess the technical knowledge needed for the delivery of their duties on the jobs they apply for. This further supports the need to focus on the development of soft skills among young graduates in Algeria.

In terms of the largest gaps between the level of skills required and the number of graduates with these skills, the research has yielded the three following soft skills in greatest shortage:

Figure 10: Top Three Skills Gaps Identified in the Research

Rank	Size of Gap
1	Dependability -1.9
2	Problem-solving -1.6
3	Team-orientation -1.4

Source: British Council research

In terms of remedial strategies, both students and local employers

interviewed agreed that more practical experience, extra-curricular and work-oriented activities, and training were needed for students who wished to significantly improve their employment chances; the opportunities available to students at Algerian universities at the moment, however, remain extremely scarce.

Though some university clubs and societies existed, particularly within larger universities in Algiers, these were neither popular nor particularly widely known. Students who attended the focus group suggested that for such clubs to attract a wider population, they would require better recognition

from the university, more funding and greater visibility with the students (either as a result of improved promotion or prestige or both). At the moment significant portions of the students' free time are occupied by coping with university bureaucracy and overcoming obstacles resulting from inadequate scheduling, lack of resources, and low/irregular lecturers' attendance. To capitalise on the strong will to change, shown by a significant number of the students interviewed, a more systemic approach to improving the general quality of higher education provision is required before its effects on graduates' employability can be felt.

Libya



Country and Economy Overview

Name:	State of Libya
Official language(s):	Standard Arabic
Spoken language(s):	Libyan Arabic, Berber, Italian, Domari, Tedaga
Population:	6,244,174 (July 2014 est.)
Capital:	Tripoli
Key industries:	Oil and gas, aluminium, iron and steel, food processing, textiles, handicrafts, cement
GDP per Capita (PPP):	\$16,600 USD (2014 est.)
Mean Monthly Salary:	\$3,800 USD (2015 est.) (5,243 LYD)*
GDP growth:	-19.8% (2014 est.)
Unemployment:	Regular: 30% (2004 est.) Youth: 30%

Overview of Educational System

Mandatory years of education:	9 years
% of university graduates:	~20% (2014 est.)[†]
Language of instruction:	Libyan Arabic, French
First year of compulsory English instruction:	6th
Languages spoken by % of population:	N/A

* Average salary data was gathered through an online survey and reported a large difference between mean and median values. Real mean is likely to be significantly lower.

[†] Based on British Council Research counting proportion of University students in total student population.

Sources: (International Labour Organisation, 2014), (Salary Explorer, 2015), (World Fact Book, 2015), (OECD, 2015), (Hajj, 2013)

Education system overview

Education in Libya at primary and middle school level is free and compulsory. All children aged 5 or 6 up to the age of 15 thus have to attend school (British Council, Unpublished). Enrolment in primary and middle schools was high in 2006 (last year where statistics exist) (UNESCO Institute for Statistics, 2015) though it is likely that the recent conflict has had a negative impact on the enrolment of children in school (Fhelboom, 2014).

Approximately 70 percent of pupils that graduate to a secondary school then specialise in arts or science. This is a newly introduced reform that replaced a former system of having to specialise in one of the following streams: basic sciences, economics, engineering, life sciences, language, social sciences. This new measure has widened the choice of courses at university level for new graduates as of 2015 (British Council, Unpublished).

The remaining 30 percent of students, who performed less well in their examinations will often continue their education at one of Libya's technical and vocational training institutes (*ibid.*).

Admission to university depends largely on grades received for the Secondary School Certificate. In general, all pupils that achieve a certain grade at the final examinations are entitled to enter higher education. Education at tertiary level is state subsidised and generally free of charge (*ibid.*).

Due to the previous set up of the secondary education system, pupils only used to be able to pursue subjects from the stream they picked before being admitted to university (*ibid.*). Moreover, Libyan students stay at home while studying at university. As a result, a number of local universities have open faculties across different towns throughout Libya. This means that, for example, Benghazi University has nine English departments across the country, while Tripoli has five (*ibid.*).

The majority of students reading for English are female and have aspirations of becoming English language teachers. Those graduating from the faculties of arts and languages can also become English teachers despite there being no formal requirement to complete any courses in education or pedagogy.

Perceptions of English

English as a foreign language was banned in Libyan school for the large part of the 80s and the 90s, and English language competence of that generation has suffered as a consequence (*ibid.*). Though it has since been reinstated as part of the curriculum, the English language competence of Libyans remains rather low.

In secondary and technical schools, English is taught four times a week for periods of 45 minutes using Garnet's *English for Libya* textbooks (*ibid.*).

The standards of English language teaching even during those limited hours remain fairly low:

In basic, secondary and vocational education English language levels of both students and teachers is low. Grammar translation, rote learning and 'chalk and talk' are common features of the English language learning classroom. Although the government implemented a communicative language teaching approach in 2002 and new books were commissioned (Garner's English for Libya), few teachers have been trained in, understand or implement a communicative approach. Moreover, inspectors are often even less aware and expect teachers to teach as they taught before them. (ibid.)

Gaps in English language abilities

Since the 2011 revolution, Libya has faced a number of economic and political challenges, which have directly impacted the employment market and demand for specific skills on the part of its workforce. Political instability, combined with a largely state expenditure-centred economy financed by oil revenues, has likely had a negative impact on rates of employment and demand for skills/language training within the country.

In terms of current English language competence levels in the country, few comprehensive data sets exist, largely as a result of current political instability, and past authoritarian regimes posing challenges to research. Two resources offer some insight into the current standard of English in Libya. First, national TOEFL scores dropped from 77 to

73 between 2009 and 2013 (ETS, 2009) (ETS, 2012) (ETS, 2013) a score equivalent to B1/B2 within the CEFR (ETS, 2015). These scores, again, must be presented within context – they are not representative of the national English level of all young people, but rather the students within the country seeking to study (usually at the undergraduate or postgraduate level) in English-speaking countries, and will likely represent stronger English students. Interestingly, since the revolution in 2011, Libyan TOEFL scores have largely been dropping (ETS, 2009) (ETS, 2012) (ETS, 2013). This may indicate ongoing challenges and decreases in the standard of education due to ongoing political and economic instability, a scarcity of native English-speaking instructors and inconsistency of supply within the English language teaching sector. English First publishes an English Proficiency Index, ranking many countries by English language proficiency – Libya consistently ranks among the bottom five countries presented in their index (English First, 2015). There are some questions, though, over the robustness and comparability of EF's examination, namely that they are not invigilated, are provided entirely online and are likely not representative of the national average English language level. Nonetheless, the majority of these concerns might be expected to raise scores substantially, and that Libya continues to score so poorly on the index is therefore of particular note.

Soft skills gap

Significantly, the public sector remains the largest employer of white collar professionals in Libya, employing approximately 70 percent of the formal workforce (European Training Foundation, 2014). The requirements for hiring these positions remain largely outside incentive and accountability structures, leading to a situation where the largest employer in the country hires on the basis of quotas, regulations and, in some instances, corrupt practices, rather than on an objective and meritocratic system rooted in skills or competencies (DPADM-DESA, 2004). This potentially contributes to a negative cycle, removing much incentive for young people to develop their English and soft skills. The remaining sources of employment within the country largely do not require English language skills or a university education. Additionally, heavy regulation of foreign companies combined with ongoing conflict and instability, have stalled

foreign investment in Libya (European Training Foundation, 2014) – usually a significant driver of demand for English language and soft skill development within developing countries.

A substantial skills gap, resulting from an education system facing systemic challenges, with weakened capacity and inconsistency of provision, combined with employment that is to some extent disconnected from market forces and higher education outputs, has contributed to the situation in Libya. Within this context, marked by the fragility of Libya's economy and ongoing political instability, it appears that demand for English language skills on the part of employers and university graduates in Libya has likely been negatively impacted. However, beyond the statistics described above, establishing the following with any degree of certainty from the existing literature remains a challenge, particularly given Libya's current political challenges.

Morocco



Country and Economy Overview

Name:	Kingdom of Morocco
Official language(s):	Standard Arabic, Berber
Spoken language(s):	Moroccan Arabic, Berber, French
Population:	32,987,206 (July 2014 est.)
Capital:	Rabat
Key industries:	Agriculture, automotive parts, mining, aerospace, food processing, construction, energy, tourism
GDP per Capita (PPP):	\$7,700 (2014 est.)
Mean Monthly Salary:	\$2,300 (2015 est.) (MAD 22,143)
GDP growth:	3.5% (2014 est.)
Unemployment:	Regular: 30% (2004 est.) Youth: 30%

Overview of Educational System

Mandatory years of education: **9 years**

% of university graduates: **~7% (2014 est.)[†]**

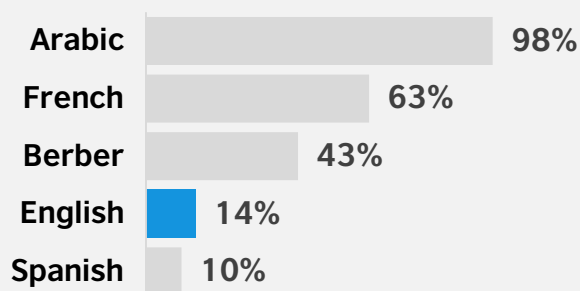
Language of instruction: **Moroccan Arabic, French (mostly in higher education)**

First year of compulsory English instruction: **10th (offered as a third language from year 9)**

English contact hours by year 12[°] **Est. ~350 – 700 (B1 – C1 equivalent expected outcome)**

English contact hours by completion of bachelor's degree[°] **Est. ~600 – 800 (B2 – C1 equivalent expected outcome)**

Languages spoken by % of population:



[†] Based on British Council Research of proportion of current university graduates to all students.

[°] Please note that the estimates are based on latest education policy available, and local knowledge of British Council staff. The total number of contact hours varies largely by stream and subjects studied. The differences between programmes are even more prominent at tertiary education level, where certain students will have no compulsory English lessons, while students reading towards the Bachelor degree in English language may have 25+ hours a week.

Sources: (International Labour Organisation, 2014), (Salary Explorer, 2015), (World Fact Book, 2015), (WENR, 2006), (OECD, 2015), (Hajj, 2013) (Euromonitor International, 2012)

Education system overview

Despite the fact that Morocco allocates almost 26 percent of its public spending to education, it remains rather discontent with its outcomes:

[T]he state has attempted to improve higher education syllabi, to promote student development and to reform university policies and curriculum each term. However, Morocco has not seen the positive results it was hoping for after these education reforms were implemented. (Ettoualy, 2013).

Education in Morocco is free in public institutions at all levels and mandatory for all children aged seven to 15 (British Council, Unpublished). Though primary school enrolment is rather high (95 percent) dropout rates remain equally elevated and only 53 percent of pupils continue onto middle school, thus limiting Morocco's progress towards universal primary education (USAid, 2015). Less than 15 percent of students that enrol in first year of primary are likely to complete their education all the way through to high school graduation (*ibid.*).

One of the ways Moroccans have begun to combat the low quality of educational provision within the state sector is by sending more and more of their children to private schools (*ibid.*), though the quality of provision within such institutions is not necessarily higher.

Tertiary education in Morocco is also free and modelled on the

French system, with instruction in Arabic and French, with the exception of Al Akhawyn University, which is modelled on the American system and hence provides instruction in English (Ettoualy, 2013). By 2009 100,000 Moroccans held degrees compared to few hundred during the colonial era. This positive development reflects the government policy to diversify and decentralise education. After independence, was declared in 1956 there were only six institutions of higher education (*ibid.*), while today there are 15 public universities, eight private, and hundreds of training and technical colleges and centres.

Perceptions of English

The Arabisation of the Moroccan education system in the 1980s is largely perceived as having failed (British Council, unpublished). As such, English has been able to establish grounds as a foreign language of choice for many students.

At the time of writing, the Superior Council's report into education reform is due. It is expected that the document will pave the way further, and in a formal way, for English to become established as the lingua franca of the higher education sector in Morocco by becoming the medium of instruction at public universities (*ibid.*). Further, since January 2015, students and teaching faculty wishing to gain admission or employment at science and STEM and health science universities will be required to first prove their English language proficiency (Erling, 2016). This shift has been supported publicly by a

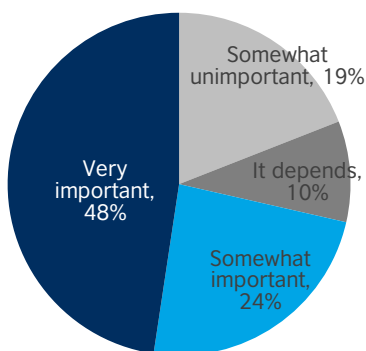
number of prominent officials including the Prime Minister.

Despite the recent changes towards better English language instruction and general presence, the trend in popularity cannot yet be described as universally upward:

Arabic is used for internal communication, and the official language of work remains predominantly French. Given that most Moroccans speak both French and Arabic, and that the demand for English skills is mainly at middle and senior levels, there is no real necessity for employers to train their employees in English (Euromonitor International, 2012).

Furthermore, there is some evidence to suggest that English is a skill necessary for securing an entry-level job for a young graduate:

Figure 11: Q: How important, do you consider, is English today for a young graduate in securing an entry-level position in your country?



Source: British Council Research, N=21

Data collected through in-person interviews and a distance survey suggests that over 72 percent of participants thought that English is either very important or somewhat important for a young graduate to secure an entry-level position.

English is no longer only a requirement for finding a job within Morocco. Sufficient levels of English language understanding and production are necessary for students to succeed in academia as well as their studies. A Head of Department at Mundiapolis university, one of the leading private universities in Casablanca, suggested:

A sufficient level of English is a pre-requisite for Master level students for finding a job. English has become a must-have for a talent provider such as Mundiapolis. When you do research and academic work you need English, otherwise you are limited to French and Arabic resources, which are significantly limited. English speakers have also better life-long learning opportunities.

In fact, the trend for the use of EFL in the tertiary education sector is slightly away from general English courses and towards English for Academic Purposes and English as Medium of Instruction. Masters-level students have significant research requirements that are difficult to achieve well without a decent comprehension of academic literature, which is largely produced in English. The requirements are even more pressing for PhD students, who are

required by their universities to present their research at, as a minimum, two international conferences. These conferences are almost exclusively in English, and students often have to publish articles in academic journals and other literature, which also requires a firm grasp of academic aspects of the language. As Morocco continues to develop and its tertiary education sector becomes more successful in the global arena, such requirements are bound to be strengthened.

Gaps in English language ability

As residents of a former French colony, Moroccans predominantly pursue French as their second language after Arabic, with many learning Berber and/or Spanish as well. However, there is a growing perception (for which there is a growing evidence base) that English improves career prospects for young people in the country – some research indicates a salary premium of c. 15 percent for English speakers (Euromonitor International, 2012). It appears this has begun to incentivise young people to develop their English language skills, despite English often being their third or fourth tongue. Additionally, demand for soft skills development has become increasingly apparent from a range of actors in Morocco, presenting opportunities for organisations seeking to offer training in such skills to Moroccans.

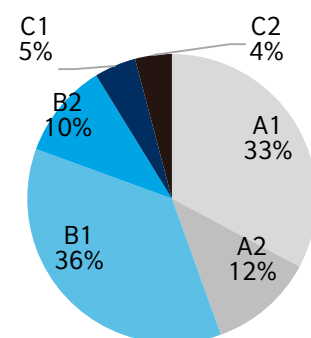
In 2011, a survey found that c. 11 percent of Moroccans spoke

² Please note that the data pertaining to graduates' English levels has been collected through official British Council Examinations,

English to an intermediate (B1/B2) standard (Euromonitor International, 2012), though levels detailed throughout this survey were largely self-reported, requiring a certain degree of caution when considering the resulting findings (MacIntyre, et al., 1997; Shameem, 1998). National TOEFL examination – rigorous, invigilated exams largely taken by young Moroccans endeavouring to study at the undergraduate and postgraduate level in an English-speaking country – have shown scores of 77-79 between 2009 and 2013 (ETS, 2009) (ETS, 2012) (ETS, 2013), a level corresponding to B2 within the CEFR (ETS, 2015).

Similarly, to the aforementioned data, test results from APTIS assessments, administered by the British Council at two separate higher education institutions, show that only 19 percent of students scored at an upper intermediate (B2) or higher level of English language proficiency.

Figure 12: Percentage of Graduates per CEFR Score²



Source: British Council research data, N=1,436

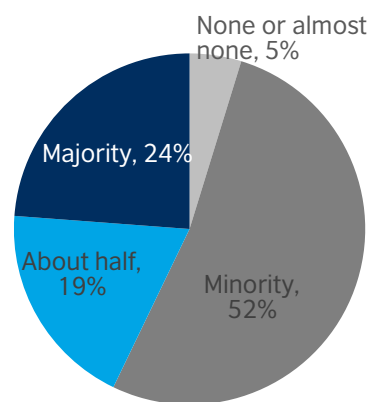
which may be subject to representative biases.

These scores are likely to be indicative of the standard of English among the stronger young speakers in Morocco, and not necessarily representative of the broader standard of English among higher education students. These results might initially appear to indicate that the standard of English among young Moroccan students is not substantially better than that of their North African counterparts elsewhere; however, it would appear that growing numbers of Moroccans are successfully applying to study in the English-speaking world (Euromonitor International, 2012; Marshall, 2013), and the average performance on TOEFL examinations may be an indicator of wider participation and demand among young people in the country, rather than particularly low English language standards.

English First's English Proficiency Index provides some additional insight into the standard of English in Morocco – Moroccans scored 55th out of the 63 countries measured, though performed better than any of their Maghrebi counterparts (English First, 2015). These results require a degree of caution, due to the fact that exams are not invigilated, and largely cover the more technologically aware youth demographic with traditionally stronger English language skills than their average Moroccan counterpart (Euromonitor International, 2012). Despite these limitations, the results of this study nonetheless offer some insight into how Morocco compares to a range of other countries in English language standards.

Despite its 'leader' status in the Maghreb region, still more than 50 percent of participants in the British Council survey claimed that only a minority of students possess the level of English required by the employers.

Figure 13: Q: How many young graduates do you consider have the level of English required by the employers?

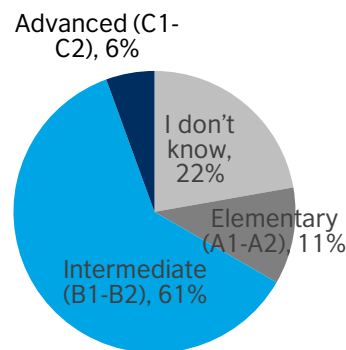


Source: British Council Research, N=21

This is a rather surprising finding, especially given that most employers do not formally test English language ability, beyond carrying out a part or the whole job interview in English. To succeed in a job interview in English, a candidate will often get by with an intermediate knowledge of English and good communicative abilities. Given that the same people, when asked in the survey about the general English levels of graduates, claimed that 61 percent had intermediate (in this case sufficient) knowledge of English, and six percent more had an advanced knowledge of English; this finding likely means that the

perception of graduates' English language ability is too generous.

Figure 14: Q: How would you rate the general level of English of recent graduates in your country?



Source: British Council Research, N=21

There is a positive trend observed in the Moroccan society, not only in English proficiency, but also the official requirements for candidates across a range of industries. Within the education sector, a representative of the Ministry of Higher Education said:

The conditions [for appointing new professors] are to have a proficiency level of English. More and more now we require to have at least two languages. There is a contest for professorships and only those that exhibit sufficient grasp of the English level can be appointed.

The stricter requirements for English at tertiary level are expected to raise the overall English language standards and improve the quality of teaching at the university level, particularly for courses and programmes delivered

in the language. The impact of such policies remains to be seen.

Soft skills gaps

The strongest sectors of the Moroccan economy comprise telecommunications and IT, which are thought to be contributing substantially to economic prosperity in the country (African Economic Outlook, 2014). Aeronautics exports grew 14 percent between 2013 and 2014 (AbiNader, 2014); automotive exports grew at a rate of 37.2 percent between 2013 and 2014; financial services comprise 14.1 percent of GDP (African Economic Outlook, 2014) and are growing at a rate of c. 4.5 percent p/a (Making Finance Work for Africa, 2013); and tourism comprises 8.6 percent of GDP and is growing at a rate of 8.1 percent annually (Turner, 2014c). Largely depending on foreign investment, these sectors are also demanding employees with adequate English language skills: 75 percent of new IT jobs, 55 percent of telecommunications jobs, 30 percent of aeronautics positions and 10 percent of tourism jobs generally require employees with strong language skills (Euromonitor International, 2012).

The Moroccan government has recently embarked on a major drive to attract foreign investment in the country by liberalising the regulatory environment, promoting its stable political climate and proximity to Europe, and offering tax incentives to foreign investors (Nsehe, 2013). Much of this has included the provision of training to Moroccans in the key skills required to perform well in industry (*ibid.*),

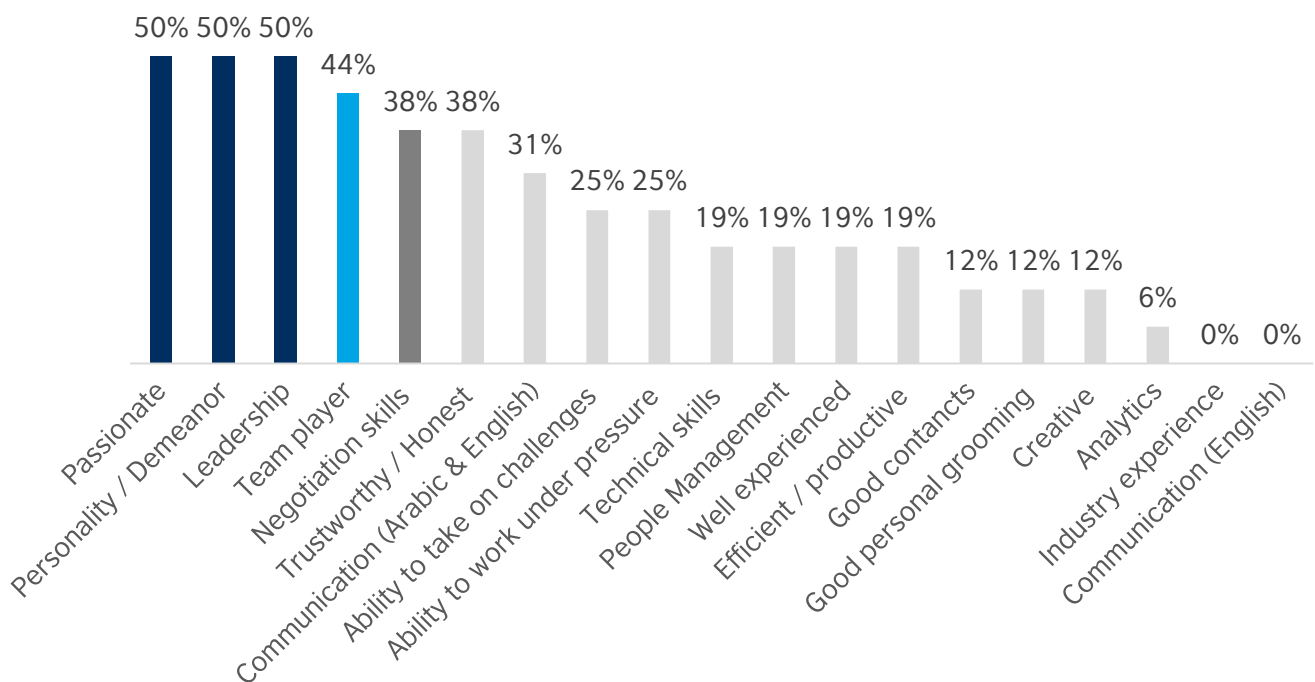
but English language skills continue to lag behind the needs of foreign firms and investors (Euromonitor International, 2012). It is possible that continued shortcomings in English language competence levels could hamper Morocco's continued economic growth unless these issues are addressed.

While substantial initiatives have been undertaken to improve the professional skills of young people in key growth sectors of the Moroccan economy, several commentators have pointed to a need to develop soft skills training for Moroccan youth in the interest

of promoting employment, employability and economic growth (Aring, 2012) (British Council, 2013) (Burnett & Jayaram, 2012) (Hoel, 2012).

A recent employability study published by Bayt.com in February 2015, collating results on the employability and soft skills that employers demand, has shown that most employers look for passionate and agreeable colleagues who can exhibit leadership potential, but also know how to engage with the team. The detailed results are shown in the figure below. Please note, more than one response was possible.

Figure 15: Q: Which of the following requirements / factors do you MOST look for in a candidate? (Morocco)



Source: (Bayt.com, 2015), N=16

Additional insights can be gained through analysis of the British Council's own research, the focus of which was on which aspects of the candidates' soft skills are most important, rather than characteristics that employers search for most often.

Figure 16: During your recruitment process, how important are the following skills for your evaluation of the candidate (1 – not at all important, 5 – very important)? (Morocco)

Rank	Soft Skill	Average Score
1 st	Strong work ethic	4.4
2 nd	Positive attitude	4.3
3 rd	Client-friendliness	4.2

15 th	Creativity	3.8
16 th	Flexibility	3.6
17 th	Entrepreneurship	3.2

Source: British Council Research

The soft skills reported as most important for the recruiter's decision included many necessary for dealing with clients and ability to deliver work proactively, on time and to a good standard. Many of the employers interviewed pointed to the fact that orderliness was a particularly distinguishing feature for successful candidates in Morocco:

Being on time (punctuality) is particularly poor in Morocco, for us it can really distinguish a candidate.

Furthermore, the other issue pointed out by the employers in Morocco was one of Moroccans focusing more on acquiring

educational qualifications, while not developing sufficient practical skills:

The labour market in Morocco does not have that much demand for Masters' students, who then require a certain level of salary. The companies require 'small heads' with whom they can work and develop them. EFE (l'Education pour l'Emploi) had to introduce a quota for people with Masters' degrees – so many of them there were. EFE found it easier to find employment for people with Bac+2, TVET education and practical education.

When asked to evaluate how many of the graduates exhibited the soft skills required by employers, the respondents' concluded the following

Figure 17: How many candidates in Morocco exhibit these skills (5 – all; 1 – none)?

Rank	Soft Skill	Average Score
1 st	IT skills	3.7
2 nd	Flexibility	3.6
3 rd	Client-friendliness	3.6

15 th	Dependability	3.0
16 th	Being organized	2.8
17 th	Entrepreneurship	2.8

Source: British Council Research

IT skills are again regarded as most present in the market, with flexibility and client friendliness following closely behind. Dependability and being organised, on the other hand, received one of the lowest scores overall, further supporting the statements of the interviewees

suggesting that evidence of orderliness and dependability can significantly enhance a candidate's chances of securing a position within the Moroccan labour market.

Setting the skills required and exhibited against one another yielded results further supporting this hypothesis. The three largest soft skills gaps being found among the three relevant skills are:

Figure 18: Largest soft skills gaps among Moroccan graduates

Rank		Size of Gap
1	Being organized	-1.4
2	Strong work ethic	-1.2
3	Dependability	-1.2

Source: British Council research

Furthermore, when asked about the interventions needed to remedy this disparity between the type of labour force produced and that in demand, the employers offered some interesting insights. One of them suggested:

Young people should be invited to work on small projects, apprenticeships, events. People who have a past of involvement in such organisations, tend to be much better candidates generally.

There are 3 types of stakeholders Businesses, the youth, and universities that have to be considered here. Businesses need to go and talk to universities to share their

needs and requirements, so that universities can train the youth through courses designed to fill the demand required.

The general theme of lack of communication between business and universities was picked up on by all employers, the students and some of the university representatives interviewed. A lack of communication between the educational sector and the private employers that are the receptors of its 'output' was blamed for the existence of a skills/language gap as well as high youth unemployment in general.

A representative of the Moroccan Ministry of Higher Education pointed out, however, that the role of the universities goes beyond the preparation of a workforce for the existing job market:

The Universities should prepare for the job market and beyond, even though technical competency may not be that important right now, the universities should not lower the standards simply to what the job market is demanding. They need to go beyond and proactively develop the job market. The universities need to prepare the students for the jobs of tomorrow, not just the jobs of today. They need to keep an eye on the job market, but also prepare students for a new job. Prepare students to be self-perfecting. We should teach people how to 'turn on' by themselves. The mechanisms to adapt, change and innovate are important. Give students the

stronghold, and springs to prospect new things. Computer science 30 years ago was a theoretical subject, yet it is extremely relevant today.

In other words, although a lot can be achieved through improving communication between the university sector and local employers, as well as involving employers directly in student programmes at the universities designed to help them improve such skills (e.g. employment skills seminars, workshops,

entrepreneurship programmes, internships), universities need to focus sufficient energy into research and innovation to help drive industry and science within the country forward. To check this sentence reinvent existing and find new fields of work for their students, rather than merely feeding the job market the students that it currently requires. It will be through this innovation that future jobs are created and students find their passion and motivation to pursue worthwhile careers.

Tunisia



Country and Economy Overview

Name:	Tunisian Republic
Official language(s):	Standard Arabic
National language(s):	Tunisian Arabic
Spoken language(s):	Tunisian Arabic, Berber, French
Population:	10,937,521 (July 2014 est.)
Capital:	Tunis
Key industries:	Mining and quarrying; manufacturing; telecommunications; public administration; oil and gas; transport; retail; tourism, agriculture
GDP per Capita (PPP):	\$ 11,400 USD (2014)
Mean Monthly Salary:	\$ 1,250 USD (2015 est.) (2,445 TND)
GDP growth:	2.8% (2014)
Unemployment:	Regular: 15.2% (2014) Youth: 42%

Overview of Educational System

Mandatory years of education: **9 years**

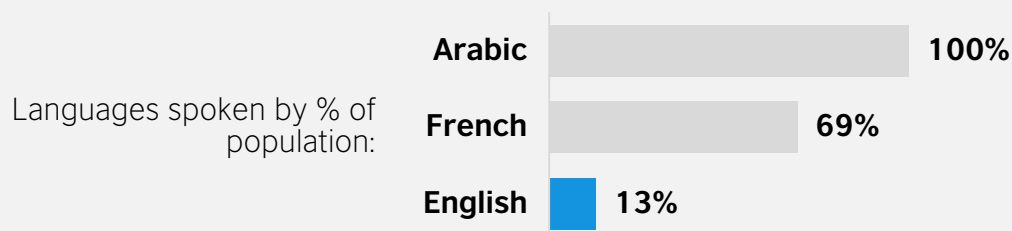
% of university graduates: **34.6% (2008)**

Language of instruction: **Tunisian Arabic, French (for science subjects)**

First year of compulsory English instruction: **6th**

English contact hours by year 12: **Est. ~600 – 700 (B2 – C1 equivalent expected outcome)**

English contact hours by completion of bachelor's degree[°]: **Est. ~800 – 1,000 (C1 – C2 equivalent expected outcome)**



[°] Please note that the estimates are based on latest education policy available, and local knowledge of British Council staff. The total number of contact hours varies largely by stream and subjects studied. The differences between programmes are even more prominent at tertiary education level, where certain students will have no compulsory English lessons, while students reading towards the Bachelor degree in English language may have 25+ hours a week.

Sources: (World Fact Book, 2015), (Salary Explorer, 2015), (International Labour Organisation, 2014), (Hajj, 2013), (OECD, 2015), (Euromonitor International, 2012)

Education system overview

Education in Tunisia has been at the heart of policy since the early years of President Bourguiba's mandate in the late 1950s (British Council, 2014). Since then, the Tunisian education system has undergone a number of initiatives and reforms, which despite all efforts have had limited impact on producing graduates with skills that would match those demanded by employers (Haouas, et al., 2012). Some of these reforms have included the introduction of compulsory primary education; abolition of the CAPtS programme, which allowed the Ministry of Education to choose some of the best English graduates to become teachers; reforms to teachers' professional development introduced within the Education Act of 2002; introduction of English to the primary curriculum; and the introduction of private universities (British Council, 2014).

There are further reforms planned, which will include a new BAC course and exam for technical subjects, or the introduction of English as an additional language from Year 3 rather than 6, as is the case now (*ibid.*). It is the teaching of languages that make the Tunisian education system somewhat particular. Pupils are instructed mostly in Tunisian Arabic, with Standard Arabic being introduced early in the Primary Cycle. Some instruction, particularly in science subjects, is then also delivered in French. English thus tends to be the fourth language to which children are exposed (*ibid.*).

Curriculum as well as teaching materials have been largely developed by the local MoE and suffer from significant limitations in terms of accuracy and appropriateness, as well as from a lack of popularity among the existing pupils (*ibid.*).

The higher education sector has also seen some significant changes in an attempt to develop skills for employability among graduates. Certain engineering degrees have begun requiring an English language certificate as a necessary prerequisite for graduation. Furthermore, the establishment of private universities has resulted in improved resources and better quality instruction (as private institutions are able to select the best among the state sector lecturers and professors) available to at least parts of the population that is able to afford the tuition fees, which range from 3,500 TND (£1,300) to 10,000 TND (£3,700) per year (*ibid.*).

Despite the recent improvements and changes in the educational sector, little else, other than the official youth unemployment figures (which some suggest under-represent the real situation) is known of their effects on youth employability and the economic potential of Tunisian labour. According to a special adviser at the Ministry of Higher Education, a law was passed in 2008 that mandates that universities follow students' destinations to gain a better overview of how successful they are in finding employment and whether they are being well prepared for careers within their

The statistics that are available suggest that, in general, obtaining a university degree decreases a graduate's chance of securing employment as the rate of unemployment is lower among secondary school graduates than it is among university graduates.

chosen fields as well as the world of work more generally, though this has not been done consistently. According to another special adviser at the Ministry, there is a general lack of statistics regarding graduates' destinations that would allow the Ministry and the schools to better address and develop more pertinent initiatives targeting youth unemployment. The statistics that are available suggest that, in general, obtaining a university degree decreases a graduate's chance of securing employment as the rate of unemployment is lower among secondary school graduates than it is among university graduates check this last part lack of statistics regarding graduates (Haouas, et al., 2012).

Perceptions of English

A range of factors has contributed to the increasing role and prominence of the English language within Tunisia. The young, in particular, have begun to pursue English skills instead of French, as many have begun to perceive the anticipated economic opportunities offered by strong English language abilities. Reports posit an income premium of 10–20 percent for strong English speakers within Tunisia (Euromonitor International, 2012). Furthermore, research suggests a strong positive correlation between the development of national English language skills, economic growth, foreign direct investment and GDP growth (Ufier, 2013) – a factor which Tunisia is increasingly seeking to harness, particularly as their largest trading partner – Libya – has begun to suffer substantial

political and economic instability, negatively impacting the Tunisian economy (Euromonitor International, 2012). Within this context, a number of indicators have led to a widespread focus on the development of the English language within the context of Tunisia.

The in-country research has supported this shift in perception with some anecdotal evidence. When asked how important they considered English for a young graduate in securing an entry-level position, the response was a universal 'very important' within focus groups of students from a private and leading public university. Employers were less decisive on this issue. Though most agreed that English levels of current graduates are lower than required in general, there was an agreement that some positions (often foreign/large client facing) mandate a higher level of English than others. Representatives of the public sector (one of the largest employers in Tunisia) interviewed stated that, other than Arabic, and sometimes French, there are no language requirements for candidates to obtain government jobs.

Furthermore, most employers interviewed assess English language skills through conducting a part of the interview in English. A lack of rigorous and structured testing of the language in the few cases examined, suggests that a graduate's level of spoken English plays a much more significant role in securing employment than their understanding of grammar and

technical aspects of the language – the two parts of English language teaching that Tunisian schools typically focus on.

A student's spoken English is then more important in the context of dialogue and communication (as opposed to presentation skills and monologue). This is because each candidate is expected to be able to convincingly hold a conversation about profession-related subjects for a rather limited period of time. All employers and government officials interviewed perceived this skill as lacking among recent graduates.

Importantly, it has also been noted by both the students within focus groups and employers that, while English language skills are important, it is only alongside other technical expertise that they improve a student's employability. Substantial evidence was collected during stakeholder interviews, however, that suggests it is not as much the type of degree that students take, as it is the prestige of the institution and course they attend. Engineering or medical students tend to be subject to stricter requirements both for technical knowledge and English, at admissions and throughout, which provides a higher potential for return on investment for the employer, consequently leading to higher demand for such graduates. Students and employers agreed that employers want to recruit graduates with good English but not with English degrees.

All members of both focus groups raised specific concerns over the allocation of roles (in the private

and public sectors) on the basis of corruption. Anecdotal accounts raised by members of both groups included explicit concerns over bribery (with individuals paying to secure jobs), as well as nepotism (with roles allocated to those known to employers, rather than on the basis of merit).

This has potential implications for those seeking to make effective interventions in the context of Tunisia, as even when skills are demonstrated by graduates, there is a risk that positions will be awarded to less capable candidates. Additionally, corruption has the potential to undermine incentives for achievement within the education system. While the views of focus group participants are not necessarily representative, other data sources (Arieff & Humud, 2015) suggest ongoing concerns relating to this area. As such, this issue warrants further study.

Discussions in focus groups, as well as stakeholder interviews, shed light on an additional area of interest: entry to more prestigious universities (in terms of perceived value and employability) is restricted to those with high scores in the Baccalaureate, while many of those admitted to degrees less likely to lead to employment have generally achieved less highly at school. Those interviewed suggest that this results in a high number of less capable graduates from degree programmes that are not valued by employers. This has additional implications, as for those graduating with degrees in English, many of whom (on the basis of anecdotal evidence gleaned from focus

groups and interviews) have few employment prospects other than teaching; this has potential implications for policy makers seeking to build capacity in terms of written and spoken English.

It is worth noting that such a situation raises questions over whether those performing poorly in the Baccalaureate should be funded to complete degree programmes that do not lead to employment, or which set an expectation of graduate work that the economy cannot meet. This is a decision that should be considered in any future government educational policy. There was some anecdotal evidence to suggest that employability of any student, regardless of level, was significantly improved by seeking work experience or studying overseas. A number of world-class universities' names had been mentioned in the focus groups explicitly as particularly effective in this, suggesting that 'brand recognition' has potential implications for those seeking to encourage study abroad programmes. Nonetheless, even those who have completed a part of their studies overseas at a lesser known institution cited benefits.

Gaps in English language ability

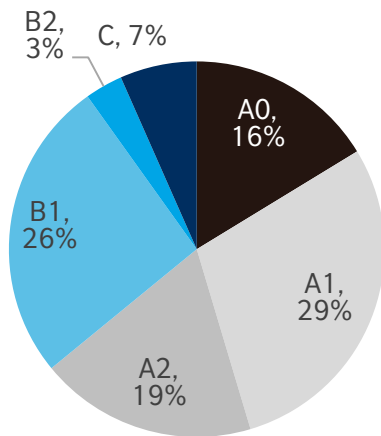
Younger learners face potential challenges in learning English in Tunisia. The Educational Testing Service offers the TOEFL examination – an examination largely taken by students wishing to attend universities in English-speaking countries. The average national TOEFL scores in Tunisia were in the range of 77 to 80 between 2009 and 2013 (ETS,

2013; ETS, 2009; ETS, 2012), a score equivalent to a relatively low B2 within the CEFR (ETS, 2015). It is noteworthy that these scores are not necessarily representative of the English language ability of all prospective undergraduates and postgraduates in Tunisia, but rather of those students wishing to study in English-speaking countries. These students are therefore more likely have a stronger level of English than the average national within the same age bracket.

Findings of a 2012 survey within Tunisia suggest that approximately 10–15 percent of respondents reported they spoke at least an intermediate level of English (Euromonitor International, 2012) – a level thought to correspond to B1-B2 within the CEFR – though reliability of these self-reported statistics is potentially questionable, given findings that many self-reported surveys of language ability can overestimate the true abilities of respondents (MacIntyre, et al., 1997; Shameem, 1998). It is further thought that the percentage of those speaking English among the young is higher than among the older population of Tunisia (Euromonitor International, 2012).

A compilation of the CEF test results taken by Tunisian university students between 2013-2015, administered by the British Council shows a similar narrative:

Figure 19: Percentage of Graduates per CEFR Score³



Source: British Council research data, N=952

Taken together, this data points to a lack of effective support structures for the emergence of strong English language skills in Tunisia, with only a smaller percentage of the population purporting to hold even an intermediate level of English, and standardised assessments largely supporting this assessment.

The employment market in Tunisia is increasingly seeking to employ English speakers, particularly in service industries. The strongest performing sectors of the economy comprised: telecommunications (ICT) responsible for c. ten percent of GDP, and a rate of growth between six percent and ten percent (Whiteshead Partners, 2013; African Economic Outlook, 2013); tourism, comprising 7.3 percent of GDP and growing annually at 3.6 percent (Turner,

2014); and financial services comprising 14.8 percent of GDP and growing at an annual rate of five percent (African Economic Outlook, 2013). These sectors require increasingly large numbers of English speakers, with 65 percent of jobs in tourism, 37 percent of jobs in finance, and 70 percent of jobs in IT requiring employees with at least intermediate English language skills (Euromonitor International, 2012). It has been argued by some commentators that the lack of English speakers within Tunisia could be hampering the growth of these industries, as the number of English speakers within Tunisia remains relatively low (*ibid.*). Even within industries not growing as quickly, but still comprising significant percentages of national GDP, demand for English language skills among employees remains high: 57 percent of petroleum jobs; 45 percent of pharmaceutical jobs; 40 percent of automotive jobs; 26 percent of manufacturing jobs; and 17 percent of trading jobs require English language skills (*ibid.*).

Additional research suggests that a significant percentage of jobs advertised online in Tunisia require English as a first or second language (*ibid.*), though the methodology utilised in this study potentially undermines the robustness of some findings – it was unclear whether English language only advertisements were analysed to reach these conclusions. There are questions as to whether the advertisements are representative

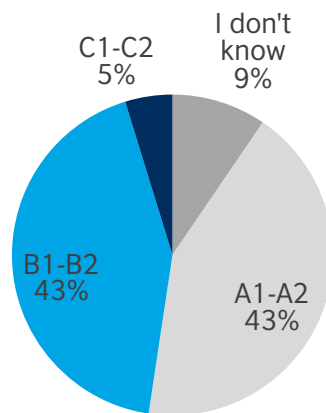
³ Please note that the data pertaining to graduates' English levels has been collected through official British Council

Examinations, which may be subject to representative biases.

of the job market as a whole, as online, print and English language advertisements will largely target urban, middle class and educated audiences. What can be established from the analysis, however, is that there does indeed appear to exist a substantial demand for English language skills in the employment market.

As far as the perception of Tunisian students' English language ability is concerned, local university staff and employers have a positive bias.

Figure 20: Perceptions of Graduate EFL Levels

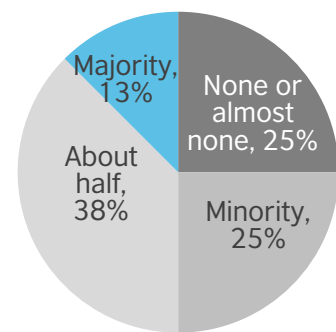


Source: British Council research data, N=21

The employers and teaching staff have regarded 43 percent of students as having an 'intermediate' level of English in Tunisia, as opposed to only 29 percent of those assessed by the British Council. Nevertheless, the same proportion of graduates' EFL levels has been perceived as elementary, with only five percent of students rated as advanced.

Indeed, employers perceived the level of job applicants' English as largely lacking.

Figure 21: How many young graduates do you consider have the level of English required by your organisation?



Source: British Council research data, N=8 representing thousands of employees

This is a surprising finding given that the level of English required by employers is relatively low. An analysis of the limited sample of employers in the country, which nonetheless included one of the largest telecommunication providers that employs more than 8,000 employees around the country, suggests that in order to succeed at an interview only a limited knowledge of English is required, as most employers do not carry out formal EFL assessments, but rather assess candidates by undertaking a part of or entire job interview in English, focusing on ability to communicate rather than knowledge of grammar or an extensive vocabulary. A little English and a willingness to speak the language are thus likely

sufficient for a candidate to pass the English language assessment.

Employers also stated that English is primarily required for two reasons: first, for sales staff, who are in charge of large international clients or TNCs; and second for employers to secure promotions into middle and top management. This finding is likely contributing to the higher mean salary of an English speaker within the Maghreb markets as compared to a non-English speaker. Together with the limited formality of EFL assessment at interviews, it could be suggested that English plays a smaller role in a candidate's success in first entering the job market, but is much more important for securing front-of-house, sales positions, a job within an international company and long-term career progression.

Soft skills gaps

Many sectors of the economy report a skills mismatch between what the education system is producing, and what employers in Tunisia need. Existing data has a focus on professional skill sets and education, with the public sector employing only half of the qualified graduates within the country (ADBG, 2012) and the private sector absorbing approximately one-third of graduates from economics, management and law higher education programmes. Researchers (Haouas, et al., 2012) have noted that:

First, the university system has continued to train implicitly for the sector of employment in the public sector, which rewards the school level even if

accumulated degrees do not improve productivity. Second, job seekers continue to be attracted by the benefits of non-wage public sector such as job security and holidays. These applicants are willing to wait long for their turn to become an official, or leave their jobs in the private sector to apply for employment in the public sector. Finally, these job seekers have job expectations too optimistic, while their actual qualifications do not correspond to the demands of the private sector.

In advanced technical fields of study, approximately 40 percent of graduates are unemployed (ADBG, 2012). The World Economic Forum points to Tunisia's inadequately educated workforce and their lack of appropriate skills as a key factor hampering investment and development in the country (Schwab, 2015). Further supporting this view, the average length of training required for an employee to become fully operational in Tunisia increased by an average of 22 percent between 2005 and 2010 across the types of employment measured by the African Development Bank in a recent study (ADBG, 2012). This increase in time required for training indicates educational provision is not keeping pace with the 'soft' and 'professional' skills requirements of the labour market. Other actors point specifically to a concerning soft skills gap across many sectors of the labour market, impacting the employment and employability of young people (Aring, 2012) (King & Palmer, 2008) (Clarke & Palmer,

2011). Taken together, a picture emerges of a labour market troubled by a shortage of appropriate educational provision, ill preparing young people with the professional and 'soft' skills required for success in a 21st century economy.

In-country research has offered some additional insights into the insufficient proliferation of soft skills among young graduates. First of all, the term 'soft skills' itself was at best poorly understood by students, who often mistook it for the communicative language skills (i.e. reading, listening, writing and speaking). Further encouragements to consider the term in a broader aspect had led the focus groups participants to guess 'ICT', 'technology' or 'basic skills', though only a single one mentioned any of the transferrable skills such as communication, motivation or flexibility, which are more typically understood by the term.

On the other hand, both employers and government representatives, when prompted to provide examples of soft skills, showed sufficient understanding of the term. Additionally, they also rated the vast majority of the soft skills surveyed as either important or very important for a candidate's ability to secure employment.

As such, though the sample size was not sufficient to warrant a statistically significant conclusion, it can be argued that lack of understanding of the term itself likely leads to lack of consideration of such skills among the students as important for employability.

Furthermore, the research has highlighted limited opportunities for students to acquire any such skills in practice. Many students, government representatives and employers have mentioned the lack of university societies or clubs that would allow students to develop and apply such skills as organisation, leadership or communication. Internship and work-relevant opportunities that would allow students to improve their employability have also been noted as limited, particularly by the students themselves; though it is worth mentioning that the vast majority of the students interviewed were students of English and humanities, and when prompted they did agree that any such opportunities are somewhat more available for their peers studying for STEM subjects and hard sciences. University exchange programmes for students to develop both soft and foreign language skills while studying abroad are also limited in Tunisia according to surveyed stakeholders.

Despite the generally poor perception of graduates' soft skills, there is anecdotal evidence that employers are ready to invest in training and development for graduates they believe have sufficient technical skills. A representative employer operating in the video game development industry and ATCT (a government-owned agency that places Tunisian workers into employment positions abroad with some 30,000 candidates on file) have reiterated that, if a candidate shows significant potential in terms of their technical abilities, they are prepared to

invest, and have in fact in the past done so on multiple occasions, in the candidate's further personal development. Courses offered included a range of soft skills such as dealing with (difficult) customers, communication, teamwork, English, etc.

Representatives from these two organisations, as well as the representatives of one of the largest telecommunication operators in the country, have also noted that it is a rather common occurrence for a new graduate candidate to have completely unrealistic expectations about salary and benefits or the level of responsibility. Based on the very limited evidence available, it would thus appear that the employers, forced by the market conditions, are ready and willing to support youth employment by financing additional training and development. It is however the students' general lack of practical experience in the real world of work that has fostered unrealistic expectations regarding salary, benefits and their roles, resulting in a significant level of voluntary unemployment on the part of the graduates.

The overall findings of the research show additional results of interest:

Figure 22: Q: During your recruitment process, how important are the following skills for your evaluation of the candidate (1 - not at all important, 5 - very important)?

Rank	Soft Skill	Average Score
1 st	Self-motivation	4.7
2 nd	Effective Communication	4.6
3 rd	Strong Work Ethic	4.6

15 th	Good Problem-Solving	3.9
16 th	Business Awareness	3.8
17 th	Creativity	3.4

Source: British Council Research

When asked about the importance of a number of soft skills for success in securing a position with a company, the employers quoted all but one soft skill as very important or somewhat important.

'Technical Knowledge of the Subject', which was selected as a benchmark for the additional soft skills, in terms of its importance for finding and securing a job scored *only* 4.3, making it less important for the hiring of a candidate than many soft skills. The findings suggest that Tunisian employers are looking for self-motivated, hard-working employees who can communicate well. It is important to note, however, that many employers commented on the survey's non-discrimination between front-of-house and back office positions, with the former requiring better communication and client management skills.

Among the skills that scored lower in terms of importance were creativity and problem solving,

It is the students' general lack of practical experience in the real world of work that has fostered unrealistic expectations regarding salary, benefits, and their roles and resulted in a significant level of voluntary unemployment on the part of the graduates.

which is a finding contrary to the overall finding of a survey for the whole MENA region carried out by Bayt.com, where these soft skills came top in terms of importance.

Furthermore, the survey also sought to establish the employers' perception of the candidates' abilities in terms of soft skills:

Figure 23: Q: Now, considering the graduate candidates you have interviewed / assessed, please tell us how many generally exhibit each of these skills (1-none of the candidates, 5-all candidates)?

Rank	Soft Skill	Average Score
1 st	IT Skills	3.8
2 nd	Self-Motivation	3.7
3 rd	Confidence	3.5

15 th	Business Awareness	2.9
16 th	Leadership	2.8
17 th	Client-Friendliness	2.5

Source: British Council Research

The researchers have then examined the gap between the levels of each skill required with the score of the proportion of candidates that have exhibited each skill. Such a metric, though admittedly quite imperfect, allows us to make some assessment of the major skills gaps and focus for future soft skills development. The three largest negative gaps were as follows:

Figure 24: Top Three Skills Gaps as Perceived by Tunisian Employers

Rank		Size of Gap
1	Client Friendliness	-1.7
2	Effective Communication	-1.5
3	Dependability	-1.4

Source: British Council Research

Though the results have put client friendliness as the area most lacking, the skill most mentioned during open-ended discussions and interviews with employers was communication. A number of stakeholders have commented on the potential candidates' significant shortcomings in terms of communication in their own mother tongue as well as in English. Employers observed in particular that candidates lacked professionalism in their approach, were not able to judge their reactions appropriately in a business context, and were incapable of maintaining a formal tone in written communication. In other words, the candidates were not regarded as client safe. Considering that there is significant overlap between the individual soft skills examined (as these skills exist in complement rather than as discrete traits), it is possible that the gap in communication is also largely responsible for the candidates being deemed as lacking in *client friendliness*.

Role of TVET in helping to close the gap

Strengthening the technical and vocational training sector (TVET) in Tunisia is also likely to have positive consequences for closing the skills gap, and more generally for youth unemployment and economic growth in the country. Representatives of ATCT have stated that graduates of technical and vocational courses (with a sufficient level of English) are in particularly high demand and rather short supply, due to their technical expertise and lower expectations regarding salary and benefits as opposed to university graduates, even if their remuneration is often higher than that of their university peers. The limits of this hypothesis are also of note. Higher employment among TVET graduates may not only be the result of more practically oriented educational provision, but also due to the fact that TVET graduates are more willing to accept employment regardless of prestige, social status and salary.

This is partly driven by the perception of TVET among the population in Tunisia, which is particularly poor. Any successful future policy to revive the sector will have to aim to break away from this perception of TVET as the education of choice for those with low Baccalaureate performance. To create a well-functioning and prestigious TVET sector, which has the potential to significantly alleviate the unemployment skills shortage pressures on the economy, encouragement must be given to particularly talented, but

potentially more technically or skills oriented pupils. No compromise in terms of language teaching within TVET institutions must be permitted, as the global market for technical specialists would be too large an opportunity to miss.

Conclusion

Based on the information available in literature as well as collected during in-country research, it would appear that any successful solution to the current situation will have to address mainly the difference between employers' and graduates' expectations, especially with regards to entry-level positions, and in particular on the part of the students. This is likely to be achieved by increasing the graduates' exposure to the real world of work through programmes such as internships, work experience, volunteering or exchange programmes.

Additional focus on English language communication skills may be required for students to improve their ability to secure employment. However, it is less English and more the perception gap outlined above that seems to be the main driver of youth unemployment.

Moreover, employers appear willing and ready to provide further training and development programmes for new employees across a range of skills and abilities. Employers are not necessarily reluctant to hire graduates that show relevant subject expertise but may be lacking in terms of soft and English language skills.

Any future strategy will thus need to address exposure to practical experience on the labour demand

side, and quality of training and development provision on the supply side.



Recommendations

Through the in-depth research, both primary and secondary, carried out for the purposes of this report, there are a number of implications for policy and general strategy with regards to the approach to the development of English and soft skills across countries within Maghreb. In the words of Haouas, Sayre & Yaagoubi (Haouas, et al., 2012):

There are two clear pathways forward to solve this problem [youth unemployment]. Either the macro-economic environment must improve to such a degree that employers are willing to hire and then train graduates to increase their productivity, without worrying much about their current skills or students need to start developing skills that employers want. Since the former is out of the control of local authorities

and depends upon getting many more institutions right, the best path forward is through the educational system.

In the spirit of this statement, the section below provides general recommendations founded in primary and secondary research carried out within the remit of this study. Though every caution has been taken to select only the most appropriate and impactful solutions, supported by evidence and presumed impact within the concrete socio-cultural contexts, it is worth mentioning that some will be more appropriate to certain geopolitical and educational milieux than others. As such, due caution and further research into the impact of the practical applications of the interventions, initiatives and recommendations listed below is strongly advised.



English



Policy

1. Recognise that both better quality teaching and an increase in the amount of learning are required to improve the levels of English of school and further education leavers.
2. Increase the importance and weighting of English within the education system (coefficient).

Potential Implications

Integrate English earlier in the curriculum.

Though still significantly limited by the availability of qualified/experienced teachers, offering English at an earlier age throughout the Maghreb will help to increase its perceived importance, as well as give children an opportunity early on to practise the language.

To ease the increased demand for qualified teachers, the Maghreb countries, however, would need to consider their immigration and visa policies. Reliant on tourism as an important source of income, both Tunisia and Morocco have a more relaxed visa policy. Algeria and Libya, on the other hand, remain fairly secluded and do not fully benefit from a qualified foreign workforce to the maximum extent possible.

Teaching

1. Provide a pre-service training programme with a strong practical teaching practice focus.
2. Provide in-service training and strengthen monitoring to reflect and enable a more communicative approach in teaching and learning.
3. Integrate CEFR levels and recognized certifications.
4. Improve teaching quality standards and introduce more challenging, recognised certifications.
5. Improve access to quality, CEFR-linked, teaching resources.
6. Review curriculum to include a more communicative approach to teaching English, enabling learners to be more involved, improve their spoken competency, and linguistic confidence in English.
7. Integrate oral skills into testing and evaluation to encourage learners to improve their listening and speaking.
8. Gradual introduction of CLIL (Content and language Integrated Learning)/EMI (English as a medium of instruction), i.e. teaching other subjects in English.

Potential implications

Training teachers first

The English proficiency levels of teachers were quoted by students in all countries researched as the primary challenges in achieving English proficiency. The general subject knowledge and language competency of those that teach it is often lacking.

You hear people talk about the importance of English; every professor, every student has to speak English; but how many actually do is much lower than what is needed. If I had to start somewhere [to improve EFL proficiency in the country], I would start with the staff and the professors. If they saw the world outside the Francophonic region that would positively impact their approach. They cannot realize the importance of English if they themselves they do not speak it.

Teaching pronunciation has been identified as particularly problematic by many of the students in the focus groups; an experience similar to other parts of the world. It was said that teachers often had good knowledge of grammar and vocabulary, but struggled with their pronunciation, which in turn led them to focus on it less during classes.

Beyond the subject knowledge, many stakeholders, including employers, students and ministry officials complained about the didactic approach to teaching that most teachers still pursue throughout the Maghreb. The quote

below illustrates the situation in Morocco:

The way the courses are given in Morocco is still traditional. There are interactive language laboratories in Europe; in Morocco the main mode of instruction is still didactic. We are trying to position English as a differentiator for employment. It is the same with research skills, we have a professor, who teaches it, but people do not use it.

Some good examples of the impact of improved teacher training provision were a marked improvement of language skills in China (EF Education First, 2014) as a result of a mandatory expanded teacher-training requirement. Similarly, the South Korean Ministry of Education has implemented the need for teachers to be trained on a six-month 'Teaching English in English' (TEE) programme, which has seen teachers' level of English and other communication skills improve significantly (*ibid.*).

Develop English as medium of instruction courses.

The development of the tertiary education sector in the Maghreb has resulted in a rapidly increasing demand for English-speaking instructors. In Morocco, for example, PhD students are also required to write scientific papers in English and present at international conferences.

The prominence of English as the academic lingua franca has also significantly increased the general demand for English for Academic

Purposes. Yet, the courses offered by the major EFL providers in the country have remained rather limited in EAP and are practically non-existent for EMI. Specialist programmes helping tertiary university students better

understand academic English, as well as engage with international research written in English and effectively deliver teaching and presentation at international conferences, would help to close an important gap on the EFL market.



Learning

1. Introduce internationally recognised certification for learners
2. Improve access to high quality learning resources (digital and non-digital)
3. Focus on learners' ability to better engage in spoken communication using English (balance of skills with better communicative, engaged learning)

Potential implications

Foster international exchange programmes

Most employers interviewed also confirmed that candidates who have experienced international exchanges during their studies tended to be of a generally higher calibre, both in terms of their English language skills and soft skills. This sentiment was also shared by many of the university and ministries' representatives. Students that have undertaken academic or professional exchanges abroad were said to be more independent, proactive, flexible and generally had a better level of English language proficiency.

Encouraging such exchange programmes for students in the Maghreb will thus likely improve the

perception of the newly graduated workforce in the eyes of the employers and may lead to higher general employment.

With this aim in mind, however, there are two issues in particular that were referred to by many of the stakeholders interviewed.

First, many of the local Maghrebi universities find it difficult to establish formal ties with foreign universities, as there are generally many more local students who wish to go abroad than students from those destination countries wishing to attend universities in the Maghreb.

Second, it is generally accepted that most students that depart abroad on an exchange or a professional placement are generally more likely than not to seek residency in the destination

country rather than return to the country of their origin, thus causing an effective brain drain.

The first issue is likely to improve over time with the further expansion of programmes such as Erasmus+ and an increasing number of scholarship programmes, some of which are administered by the British Council.

Moreover, as the educational provision at local universities improves, they are more likely to attract students purely on their academic merit. Until such time, it may be advisable to Maghrebi universities that wish to attract foreign students or staff to focus on promoting the experience as a

whole. Both Morocco and Tunisia have succeeded in building a flourishing tourism industry that can help attract foreign students and staff. The current political situation in Libya makes this, at least at the present moment, an impossible goal for Libya. Algeria's natural and cultural history, on the other hand, has not been met with the attention and admiration that, in the opinion of the researcher, it deserves. This is likely due to an underdeveloped tourism infrastructure and a relatively strict visa regime. Changes in these two areas in particular should allow the country to benefit much more from tourism but also from demand for local tertiary education.



Soft Skills



Policy

1. Recognize soft skills as important elements of educational outcomes for students.
2. Encourage stronger links between employers and schools and universities.
3. Identify key soft skills needed.

Potential implications

Track and use data

The research for this report, in country as well as secondary, has been continuously characterised by the absence of good quality data on student abilities, employment and a range of other socio-economic indicators. This was true not only at national level, as coordinated by the

relevant authorities, but also within universities and many of the employers' organizations.

This report sought to make its recommendations pertaining to policy as evidence led as possible. The issue is that even if implemented, fully national-level policy will have limited impact if lower-level stakeholders are unable or unwilling to change. Universities,

employers and governments throughout the Maghreb need to improve their data collection and data management processes to be able to better analyse the effectiveness of their programmes as well as help design new interventions to assist their students in gaining employment. The Ministry of Higher Education in Morocco is already very much aware of this sentiment:

One of the things we can do is to get universities to work together and spread good practices [and] Organise conferences. The Ministry plans to look into how to track the success of students in the job market. These are big ideas and we need time to develop them.

Improve the perception of TVET

At the moment, throughout the Maghreb as well as in other parts of the world, the technical and vocational training sector suffers from a bad reputation. This is an unjust perception on the part of the students and senior stakeholders, as students that complete TVET education often receive higher initial remuneration than their university-educated peers. This is in part due to the high demand for certain technical and vocational professions, which are in short supply, but also due to the bad reputation of TVET. It is also partly due to the practical focus of TVET education, which results in developing highly applicable skills as opposed to theory-based university education.

The programmes to improve the perception of TVET education are numerous and have had varying degrees of success. Generally speaking, those that were met with best improvement of perception focused on aspects including but not limited to:

- Quality of educational provision
- Building employer networks (to lead to employment for students and opportunities for practical experience)
- Applied stricter disciplinary policies of attendance and conduct
- Focused on practical aspects of education

Source: (TVET Asia, 2015), (UNESCO, 2015)

An interesting example of good practice can be seen in the initiative seeking to implement international partnerships for vocational courses in Yemen (EF Education First, 2014), which was formulated by the British Council (UK) and the Yemeni government. The initiative involved the embedding of English as a core curriculum in Yemen's vocational colleges along with innovation and enterprise. Most interestingly, it involved the British Council's Best Innovation Award for Technical Graduates, a programme to encourage innovative ideas and practices among students. Similar success stories also comprise partnerships implemented in Vietnam's technical colleges and Egypt's vocational and technical institutes (International Public Affairs; Booz Allen Hamilton, 2013).



Teaching

1. Review pre-service and in-service training and monitoring systems to reflect and enable a more communicative and interactive approach to teaching and learning.
2. Improve access to teaching resources that focus on the development of key soft skills.
3. Review curricula and resources in light of the need to develop stronger soft skills for better education and employability of learners.

Potential implications

Give weight to the student voice

Though this particular recommendation may appear less focused, the recognition of the student voice is likely to improve student participation and, consequently, their skills, as per employer requirements.

At universities where student-led societies existed and operated effectively, few students knew of their existence. Many quoted the lack of communication, significance, and socially perceived prestige of such societies and clubs as their reason for not participating. As long as the activities of these societies remain inconsequential for wider student life at these institutions, this is unlikely to change.

The reliance of the educational system in the Maghreb on traditional teacher authority, alongside a didactic approach to teaching, has created a fairly unresponsive student body within

most institutions of tertiary education; a fact that has been confirmed by both government officials and employers within these markets. By supporting the student voice and giving it outlets through such societies and clubs, the universities will encourage not only student participation but also help develop employability skills and foster a proactive approach within its student population.

There are a number of ways in which this can be achieved. For example, the creation of student unions (though not without its own drawbacks) as bodies that represent the student voice within each institution can further empower existing student societies and clubs as grounds for developing student leadership and participation. It is an opportunity for the leadership of these institutions to become more responsive to student needs and their perception of what is required to succeed in the job market.

This is by no means to suggest that all universities should yield authority to student unions, if they become established; for when students are left in charge of deciding their own curricula and/or workload, they often opt for the easy rather than the effective. It is, however, necessary that more importance/attention is given to those taught at the expense of those teaching to achieve an environment more conducive to positive educational outcomes in line with employer requirements.

Another such programme worth mentioning here is the British Council's own Young Arab Voices.

Young Arab Voices

Following historic events in the region, Arab societies are facing common challenges related to building democratic and pluralistic communities and promoting public voice. Through consultation and needs assessment, three key needs have been identified for young people in terms of supporting freedom of expression:

- *Increase young people's skills for public debate*
- *Provide platforms for youth from diverse backgrounds to meet and exchange views*
- *Provide targeted support for young bloggers in terms of outreach work at the grass-root level, enabling them to bridging the gap*

between virtual and public space

The 'Young Arab Voices' is a regional project, jointly launched by the British Council and the Anna Lindh Foundation, aims at developing skills and opportunities for youth-led debate across the Arab region.

The Young Arab Voices regional programme, since its launch in 2011, aims at providing opportunities, tools, and capacity building for the involvement of youth in running and managing effective debates for the purpose of enriching the pluralistic democratic dialogue existing in the Arab world.

The programme depends on establishing partnerships with the education sector, as well as the civil society sector; from NGOs, youth groups, culture centres, schools and universities, as well as the concerned ministries in the targeted countries: Jordan, Egypt, Libya, Tunisia, Algeria and Morocco.

Source: (British Council, 2015)

Provide employment skills courses

One of the other major areas of provision currently under-supplied at universities throughout the Maghreb are general employment skills, including but not limited to CV writing, interview conduct and preparation, and general business awareness.

Employers interviewed during the course of the primary research

throughout the region agreed that the general level of employment skills among new graduates is poor. CVs were often unfocused, filled with errors; motivation letters mentioned the wrong employer's name; and conduct during interviews left a lot to be desired, with candidates often described as lacking 'communication skills', 'being unable to negotiate effectively' and 'being too focused on salary and benefits rather than showing genuine interest in the position at hand'.

In the Maghreb markets, with large public sector employment, students often quoted that they felt it was difficult to obtain employment without connections. Though this raises some concerns over the

potential prevalence of protectionism within the public sector in the Maghreb, which is beyond the scope of this study, private employers interviewed said that they often considered even speculative applications, and many had, as far as the researchers were able to observe, solid recruitment procedures, often founded in best practice, suggesting a relatively fair and objective candidate selection.

The students' perception is thus out of line with the market conditions. Courses in general employment skills would offer them a chance to gain confidence and understanding of the general job application process, increasing their chances of securing employment.



Learning

1. Raise awareness among learners of the importance of identifying and developing soft skills as a key component of their employability.
2. Improve access to high-quality resources (digital and non-digital) that help learners reflect on and develop their own soft skills in identified priority areas.
3. Create access to career development services at secondary school, vocational training colleges and universities.

Potential implications

Develop careers centres and advisors

None of the universities interviewed in Tunisia and Algeria had a dedicated member of staff to advise students on career options and prospects; and though one of the universities in Morocco had selected a staff member to provide basic employment training to students, this member of staff was mostly based away from campus and many students were unaware of their existence when asked.

Career centres serve many important roles in modern universities. The following list outlines some of major roles of university career centres and advisors:

- Provision of individual guidance to students looking for job opportunities
- Communication with employers regarding job market needs and conveying them to

university leadership and students

- Organising presentations and training sessions in skills for employability
- Tracking student success and destinations

The problem of youth unemployment in the Maghreb is at least partially driven by the mismatch between the skills required by employers and those being developed by universities. Career centres provide a crucial link in communication for these universities, so that they can be better suited to developing the human resources demanded on the market.

At the moment the career centre provision in the Maghreb is extremely weak. Students are not given explicit guidance regarding their employment options and opportunities, and when they are this is again done in a didactic manner with little scope for interaction.

The key to the long-term success of these centres, however, lies in their ability to track employment data and derive evidence-based interventions for the curricula, programmes and training offered within universities. Though some of the universities interviewed tracked the employability of their students, these efforts were often uncoordinated, and no evidence was presented to show that tracked data had real implication for university policy.

By fostering the development of career advisers and career centres within universities, the Maghreb countries can ensure that their tertiary education sector is more conducive to the development of a labour force aligned with the labour market needs.

At the time of writing this report, there are talks in Morocco of sponsoring the development of career centres at universities with the help of USAid. The impact of this potential project remains to be seen, though other universities can co-operate with Moroccan stakeholders with regards to the framework and approach applied going forward, should its application in Morocco prove a success.

Create opportunities for students to participate in student-led extra-curricular activities

Although among the universities interviewed there were a number that provided students with opportunities to partake in extra-curricular activities, such as an arts' day, sports' day or a number of social events, only a selected few

have demonstrated that such activities were accessible to students on a regular basis. Moreover, such opportunities were only present at tertiary level, with no or little evidence that any such opportunities are easily accessible to secondary school students.

Though limited funds may restrict the availability of extra-curricular activities at some institutions, the model of student-run societies and clubs, as is practised, for example, at most British universities, offers a potential solution, in this instance. Student-run organisations require less funding than those officially organised by the university. What is more, in the case of small sports or interest clubs, no funding may be required at all. Instead, the university may volunteer its premises, equipment, or the time of its staff to support such societies.

The fact that they are student led helps students build the soft skills later valued by employers, particularly if such students are involved in the organisational and administrative positions as presidents, secretaries, or bursars of such societies.

Promote entrepreneurship

There are a number of government-led programmes currently in development to encourage entrepreneurship among the young population. In Tunisia, for example, the Ministry of Higher Education has a dedicated secretary for entrepreneurship.

A number of universities in the region are also trying to match the state's efforts. An over-reliance on

the public sector as the source of employment for young people in the region is an unsustainable situation. Young graduates who not only find jobs through being entrepreneurial but also create more jobs for others represent the only way forward for the Maghreb.

Universities represent a perfect breeding ground for entrepreneurial ideas; be it in relation to innovative research or products, or as a result of young enthusiasm restricted by minimum responsibility. Thus, offering students an opportunity to develop entrepreneurial ideas, find mentors, secure financing, and seek support while still at university is one of the ideal ways of developing not only their soft skills, but also resolving the wider issue of youth unemployment in the long run.

The British Council currently also supports a number of social enterprise initiatives around the world; thus giving young entrepreneurs the chance to create value and jobs, and focus on socially beneficial initiatives.

The current framework and knowledge of best practice within the British Council can be used to guide further development for entrepreneurship programmes and social entrepreneurship in particular. A detailed analysis of the related risks and opportunities has been already developed for Morocco by the British Council (Chung, 2014).

Given the potential for job creation associated with entrepreneurship programmes, a number of government officials have expressed themselves in support of similar policies:

We [Ministry of Higher Education] have to prepare the legal framework for business to be easy and to help entrepreneurs succeed. We have to have some mentorship programmes for youth to get success stories to promote entrepreneurship among students, and to devote more budget of the Ministry to soft skills programmes.

Methodology

This desk study has been informed by a mixed-methods research approach, drawing on both qualitative and quantitative data gathered through desk-based research (focusing on the four primary markets), and supplemented during subsequent phases through surveys, key informant interviews, and focus groups, as well as additional analysis and review of in-country data not available in the public domain. This study is intended to provide a clear and concise assessment and analysis of current trends in the English language competency levels, and soft skills, of current and recent graduates in Algeria, Libya, Morocco, and Tunisia. It is also intended to appraise these against the requirements of the private sector in the region, to gauge the extent of the gap between employers' needs and graduates' capacity, in order to inform future intervention strategies for closing this gap for the British Council.

Furthermore, this research informs evidence-based recommendations as to specific approaches and methodologies for the next phases of field studies within the countries, in order to close any outstanding gaps in existing research, and identify areas of special focus where the British Council's provision can deliver most impact.

The study's mixed-methods model is rooted in a 'pragmatic' approach (Tashakkori and Teddlie, 1998), drawing on a range of research

tools (Howe, 1988: 15) to gather myriad qualitative and quantitative data, to allow for triangulation of results in order to validate findings (Blaxter, et al., 2006: 86). The intention of the research has been to remain focused on 'objective' (Phillips, 1993), evidence-based findings and recommendations. No idealistic or political stances or world views have informed the development of this research (Kaestle, 1993), but rather the study has sought to engage with, rather than be a party to, a number of contrasting theories regarding English language skills development.

Methodology for in-country research

During the in-country stages of the research the consultant(s) engaged a range of research tools, which are further described in detail below, including but not limited to surveys, structured interviews and focus groups. Within this context, a survey-based (Denscombe, 1998: 7) approach was adopted, allowing for the collation of a wide range of evidence, informed by in-person interviews (Denscombe, 1998: 31). This allowed for the collection of complementary qualitative and quantitative findings, in keeping with the mixed-methods approach adopted for the wider study (Tashakkori and Teddlie, 1998). This model underpinned all structured interviews (Denscombe, 1998: 175), with questionnaires completed by the researcher during all such interviews. Such an

approach was likely to lead to some inevitable loss of depth, but allowed for consistency and comparability of data. It also helped to avoid the risk of 'data overload' (Denscombe, 1998: 284), which is a particularly significant challenge in small-scale research initiatives, and inherent in other, less focused models, such as unstructured interviews (*ibid.*).

Preliminary surveys, provided below have been designed to gather data pertinent to the underlying areas of research and gaps in current literature. Careful caution has been paid to avoid leading questions in order to avoid biased interview outcomes (Denscombe, 1998: 163). In-person interview techniques must then ensure that the researcher(s) avoid any leading of respondents (Denscombe, 1998: 159), mitigating the potential risk of skewed findings. Findings of future research should be validated by drawing on and triangulation with sector experts' views and findings, to refine research instruments (Strauss and Corbin, 1998), in keeping with good practice.

In addition to gathering primary data while in country, the researcher reviewed local data repositories, as well as internal records, to supplement research findings already available in the public domain.

Ethical considerations

Primary research carried out as part of this study has warranted a range of ethical obligations on the part of researchers that dealt directly with

respondents and focus group participants, to ensure they maintained a clear duty of care (Bell, 1999: 43) toward participants at all times. The purpose, nature and agenda of research had always been communicated clearly to research participants, so that they were able to make a free and informed decision as to whether they chose to participate (Blaxter, et al., 2006, p. 158) in the spirit of informed consent as an essential prerequisite to ethical research. Participants were also given the freedom to withdraw should they choose to do so (British Educational Research Association (BERA), 2004, p. 6).). In cases where institutional data was used, this was accessed through relevant 'gatekeepers' as appropriate (*ibid.*).

Within the context of the Maghreb, there were also risks relating to compliance issues, particularly with regard to corruption (Patrinou & Kagia, 2007, p. 63). All research undertaken thus took steps to ensure the highest possible standards of integrity and good practice (*ibid.*). All research was undertaken in line with the British Council's policies and guidelines, within the framework of the British Educational Research Association *Revised Ethical Guidelines* (British Educational Research Association (BERA), 2004) and in line with the stipulations of the United Kingdom Bribery Act. Specifically, it was essential that measures were put in place to ensure no bribes or facilitation payments were paid by any parties or agents involved in the research process.

Research tools

In support of the findings presented here, the consultants carried out limited in-country research, mostly employing stakeholder interviews and focus groups. The section below outlines the methodology and tools used in this research. Due to the limited number of stakeholders available, the original findings of this report should be taken to validate existing research and studies, rather than to stand parallel to them. At the time of writing further in-country research and stakeholders' surveys are pending and thus all findings presented here remain non-exhaustive and subject to change in line with further data, feedback and research.

Tunisia – in-country research

During the in-country research in Tunisia, our consultants have carried out interviews and focus groups with the following stakeholders:

University students	27
University representatives	1
Government officials	2
Employers / HR managers	16
Government employment agencies' representatives	4

The stakeholders interviewed represented the following organisations:

- Ministry of Higher Education and Scientific Research
- UTICA
- ATCT
- Manar University, Tunis
- Universite Centrale
- Digital Mania
- Large telecommunication provider
- Number of other undisclosed employers

Morocco – in-country research

University students	35
University representatives	2
Government officials	2
Employers / HR managers	7
Government employment agencies' representatives	2

The stakeholders interviewed represented the following organisations:

- Mundiapolis University
- SIST University
- Ministry of Higher Education
- UKTI
- British Chamber of Commerce
- EFE Maroc
- Large Engineering firm
- A number of other undisclosed employers

Algeria – in-country research

University students	~150
University representatives	3
Employers / HR managers	4
Government employment agencies' representatives	1

The stakeholders interviewed represented the following organisations:

- University of Blida
- USTHB
- MDI Business School
- Large Telecommunications Provider
- Large Car Manufacturer
- UKTI
- Education First
- A number of other undisclosed employers

Interview questions

The following questions represent all questions that have been asked during stakeholder interviews. Not all questions have always been asked of all the stakeholders. Some questions have been reserved for certain groups.

Demographics

1. What is your name?
2. What is the name of the organisation you work for?
3. What is your position?

4. How long have you been in this position?

- Less than a year
- 1 – 3 years
- 3 – 5 years
- 5 – 10 years
- 10 – 15 years
- Longer than 15 years

5. Approximately, how many employees work for your organisation? / How many students currently study at your institution?

6. Are you/have you ever been directly in charge of hiring new employees for your business?

7. If so, have you been in charge of recruiting graduates?

8. If so, how many recruiting decisions do you do a year? / How many students will graduate from your institution this year?

English language Skills

9. Does your organisation have official requirements for English language levels for new employees (excluding English language teachers) within the state sector?

- Yes
- No
- Don't know

10. If so, what are they?

11. If so, how are they assessed?

12. If so, do you know the proportion of applicants that pass/fail the English language assessment?

13. Do you consider the assessment is effective?

- Yes
- No

14. Why/Why not?

15. Do you ask your candidates to provide a certificate of English language ability (such as IELTS, TOEFL, or APTIS) during the hiring process?

- Yes
- No
- Don't know

16. At what level of English do you consider are most applicants to your organisation (CEFR levels are included in brackets)?

- Elementary (A1-A2)
- Intermediate (B1-B2)
- Advanced (C1-C2)
- I don't know

17. Please rate your perception of the applicants' English level ability per communicative skills below.

	Elementary (A1-A2)	Intermediate (B1-B2)	Advanced (C1-C2)	I don't know
Speaking - Dialogue (e.g. conversation, interaction)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaking - Monologue (e.g. presentation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

on, speech)

Listening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. With regards to the two questions above, how do you know?

19. Does your organisation have official requirements for any other foreign language?

- Yes
- No

20. If so, what are they?

21. If so, how are they assessed?

22. If so, do you know the proportion of applicants that pass/fail this language assessment?

23. Do you consider the assessment is effective?

- Yes
- No

24. Why/Why not?

25. Please rate the following statements according to how much you agree with them (1- strongly disagree, 5-strongly agree) with regards to the context of your own country.

- Ability to speak English fluently is a skill necessary for new graduates to secure a job.
- Ability to speak English fluently is a skill necessary for new employees to progress professionally.

- Ability to speak English fluently is a skill necessary for the day-to-day work of any new employee.
 - The English language skills of current university graduates meets the level required by employers.
 - The ability of young graduates to speak English has a positive impact on their chance to secure and keep employment.
 - Speaking English fluently is as important as having specific technical knowledge for the graduate to secure employment.
26. Are you familiar with the Common European Framework of Reference for Languages (CEFR)?
- Yes
 - No
27. Are you familiar with the British Council?
- Yes
 - No
28. Could you name some of the services it offers, or projects you know they have worked on in this country?
29. Are there any opportunities for personal development or programme support where British Council could assist you more? What are they?
30. Are you satisfied with the current levels of graduates' English language ability in your country?
- Very satisfied
 - Somewhat satisfied
 - Neutral
 - Somewhat dissatisfied
 - Very dissatisfied
31. Please provide reasoning for your answer.
32. In your opinion, what can the universities do to help students improve their levels of English?
33. In your opinion, what can the government do to help students improve their levels of English?
34. What provision does your organisation specifically offer to help students improve their English language skills?
35. Do you consider these are effective?
- Yes
 - No
 - Don't know
36. Why / Why not?
- ### Soft skills
37. Are you familiar with the term soft skills?
- Yes
 - No
38. If so, could you give me examples of soft skills?
39. How important do you consider these soft skills for graduates in order to find and secure employment (1 – not at all important, 5 - very important):
- Technical knowledge of the subject
 - IT skills
 - Strong work ethic
 - Positive attitude
 - Dependability

- Self-motivation
 - Team-orientation
 - Being organised
 - Works well under pressure
 - Effective communication (in your own language)
 - Flexibility
 - Confidence
 - Good problem-solving
 - Creativity
 - Entrepreneurship
 - Client-friendliness
 - Leadership
 - Business awareness
40. Are there any other non-technical skills (soft skills) that you consider important?
- Yes
 - No
41. Please comment on your answer.
42. How important do you consider these additional skills to securing entry-level employment for your students?
- Very important
 - Important
 - Neutral
 - Somewhat unimportant
 - Not at all important
43. Do you consider the following methods are effective in assessing these 'soft skills'? (Answers Yes, No, Don't know)
- Personality questions / tests
 - Scenarios/case study questions
 - References
 - Candidate's conduct during an interview
- Others please specify: _____
44. Are there any other ways in which you assess these skills? If so what are they?
45. Do you work / come into contact with recent graduates?
- Yes
 - No
46. Now, considering some of the graduate candidates you have worked with most recently, please tell us how many generally exhibit each of these skills? (1 - none of the candidates exhibit this skill, 5 - all candidates exhibit this skill to the professional level required)
- Technical knowledge of the subject
 - IT skills
 - Strong work ethic
 - Positive attitude
 - Dependability
 - Self-motivation
 - Team-orientation
 - Being organised
 - Works well under pressure
 - Effective communication (in your own language)
 - Flexibility
 - Confidence
 - Good problem-solving
 - Creativity
 - Entrepreneurship
 - Client-friendliness
 - Leadership
 - Business awareness
47. Please list any other skills that are exhibited by majority of graduates.

48. In general, who do you consider should help entry-level workers develop these skills? Select all that apply.

- Themselves
- Educational system (primary and secondary)
- Universities / Vocational and Technical Colleges
- Community-based organisations (e.g. community clubs, etc.)
- Employers
- Private training organisations (e.g. British Council)
- Other, please specify:

49. Does your institution carry out any formal needs assessment of new students with regards to their 'soft' and employability skills?

- Yes
- No
- Don't know

50. If so, what does it involve, what are the results and how are these used?

51. Does your institution have programme(s) in place to develop these 'soft skills' in its employees?

- Yes
- No
- Don't know

52. If so, what do they look like?

53. In general, who do you consider should help entry-level workers develop these skills? Select all that apply.

- Themselves
- Educational system (primary and secondary)

- Universities / Vocational and Technical Colleges
- Community-based organisations (e.g. community clubs, etc.)
- Employers
- Private training organisations (e.g. British Council)
- Other, please specify:

54. Do you consider there are interventions, programmes or advice your institution can offer / do better to improve the soft skills of graduates?

- Yes
- No
- Don't know

55. If so, what are they?

56. Do you consider there are interventions, programmes or advice the government can offer / do better to improve the soft skills of its graduates?

- Yes
- No
- Don't know

57. If so, what are they?

58. Do you consider there are interventions, programmes or advice the universities can offer / do better to improve the soft skills of its graduates?

- Yes
- No
- Don't know

59. If so, what are they?

60. Which soft skills do you consider most important for your country in order to stimulate economic growth in the long-run?

Other drivers

61. Is your organisation planning to hire graduates this year?

62. If so, how many?

63. What are the main reasons for hiring / not hiring graduates in your organisation?

64. What jobs do you consider are universities preparing their students for?

65. What jobs do the students actually end up taking once they graduate?

66. If the answers to the previous two questions differ, please explain why?

67. What do you consider are the main reasons for hiring / not hiring graduates from an employer's perspective?

68. Are there any other major obstacles to hiring of graduates in the current job market you are aware of?

- Yes
- No

69. If so what are they?

70. Are there any measures / interventions that you know of that would increase the hiring of graduates?

- Yes
- No

71. If so, what are they?

72. Does your institution have a careers centre or a career advisor to assist students and graduates in finding employment?

- Both a careers centre and a career advisor
- Just a careers centre
- Just a career advisor
- My university has neither
- I don't know

73. If so, could you briefly describe the services or advice they provide?

74. If so, do you consider it effective in achieving that task?

- Yes
- No
- Don't know

75. How do you know?

76. What is the proportion of graduates from your institution that find employment within 6 months of graduating?

77. What do you consider are the most important factors for graduates in deciding whether or not to accept a job offer?

78. To the best of your knowledge, what are the main industries graduates enter once they have left your institution?

79. Out of the graduates that have been offered a job at your company within the last year, roughly what percentage ended up accepting the position?

80. Out of the graduates that have been offered a job at your company within the last year, roughly what percentage ended up accepting the position?

81. Do you consider that getting educated at university level improves the graduates'

- chances of securing and keeping a job?
- Yes
 - No
 - Don't know
82. Why / Why not?
83. To the best of your knowledge which jobs currently require most graduates within your country?
84. To the best of your knowledge, what are the main industries graduates enter once they have left your institution?
85. What do you consider are the 5 most and least prestigious jobs available to graduates on the market?
86. Which technical skills do you consider most important for your country in order to stimulate economic growth in the long-run?
87. Does your organisation advertise new positions?
- Yes
 - No
 - Don't know
88. If so, where (please select all that apply)?
- Internet job boards
 - Newspaper
 - TV advertising
 - Radio
 - Through job centres
 - At universities
 - On company website
 - Direct approach (contacting candidates you found)
 - At job fairs
 - Word of mouth
 - Internal recommendations
 - Other (please specify)
89. Please rate the various means of advertising according to how effective they are in attracting graduates (1 = very effective, 5 = not at all effective)
- Internet job boards
 - Newspaper
 - TV advertising
 - Radio
 - Through job centres
 - At universities
 - On company website
 - Direct approach (contacting candidates you found)
 - At job fairs
 - Word of mouth
 - Internal recommendations
 - Other (please specify)
90. How effective are other means of advertising you use?
91. Which of the channels mentioned above resulted in most hires?
92. How many applications do you usually receive per position advertised?
93. Please describe the hiring process at your company (what stages do the candidates have to go through? How long does it usually take? What do you like / dislike about it? Etc.)

Stakeholder focus group

The focus groups were carried out with relevant stakeholders and

pertaining to the potential interventions with regards to English language and soft skill levels among graduates, and more generally in the economy.

Engagement questions

These are questions that are designed to introduce the participants to the topic of discussion (Elliot & Associates, 2005).

1. What do you understand by the term 'soft skills'?
2. How important, do you consider, is English today for a young graduate in securing an entry-level position?

Exploration questions

These questions are designed to address the core topics of the study.

3. What 'soft skills' if any do you consider are most important for graduates to secure an entry-level position?
4. Do you consider that current graduates in your country exhibit these skills sufficiently? Why/Why not?
5. Who should be responsible for ensuring these skills are developed in graduates?

6. What do you consider are effective interventions for 'soft skills' development?
7. What do you consider to be the main factors in high levels of graduate unemployment in your country?
8. Do you consider sufficient English language skills are necessary for securing/maintaining an entry level position for a graduate?
9. What do you consider the general English language skill level is for fresh graduates in your country?
10. Is this level sufficient for securing entry-level positions?
11. What can be done to address shortcomings in English language provision?
12. Who should be responsible for the implementation of any such interventions?
13. What are the 5 most / least prestigious jobs for graduates in your country?

Exit questions

14. In your view, what else can be done to address youth unemployment in your country?

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