BRITISH COUNCIL

TransformELT

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إتري للبحث

Algeria – Improving English Teaching and Learning for Employability, Resilience and Networking

Commissioned by British Council

Contents

Executive summary

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Rationale and drivers for the demand for English

Purpose of this research

In response to the growing demand for English in Algeria and the associated opportunities English provides for young people to improve their employability, resilience and networking the British Council commissioned this research in March 2020 in order to understand, from different stakeholder perspectives, what systemic improvements in the teaching and learning of English are needed and how they can be most effectively implemented.

This executive summary highlights our main findings and key recommendations, as well as the principal themes of the contextual review. The main body of the report provides a more detailed analysis of the context and research results that generated our recommendations.

Drivers for the growing demand for English

Government and individual vs industry perceptions

The growing demand for English is largely driven by government policy and individual aspirations, and to a lesser extent by requirements from business and industry, with the exception of the oil and gas industry. Euromonitor (2012) attributed 50 per cent of demand for English to government, 40 per cent to individuals and the remaining 10 per cent to companies. Only 5 per cent of companies surveyed from a range of industries required 'intermediate English', 36 per cent required intermediate, 25 per cent required 'basic level of English', and 34 per cent required a basic level. Despite the paucity of more recent literature available, it is evident from interviews and surveys conducted for the present study (see Part Three, 2.1.1; 3.2.1; 3.2.2) that there is a strong demand for English language skills in the Algerian workplace (3.2) and that most companies who hire English-speaking candidates are looking to hire individuals with either an Advanced or Technical level of English proficiency.

Changes in industry perceptions

The Euromonitor survey (2012) included an interviewee from a leading pharmaceutical company who stated "While the demand for English is strong among oil and gas companies, other industries place less importance on the need for this skill. We really don't require English for most job positions, although our top management are typically fluent in English. This is because 80 per cent of our shares are held by the government, where Arabic is the key language spoken. For oil and gas companies, English is important, but for us, we will give it a ranking of 1 out of 5". Today, enterprises are classified as state-owned (SOEs) according to the "51/49" rule whereby the state has to have at least a 51 per cent shareholding in all projects involving foreign investment. SOEs are present in all sectors of the economy. SOEs are so prevalent that a comprehensive public list does not exist, rather all SOEs are amalgamated into a single line of the state budget. Senior management teams at SOEs report to their relevant ministries and CEOs of the larger companies such as Sonatrach (oil and gas), Sonelgaz (electric and gas), and Air Algérie report directly to ministers (US Department of State 2018). The results of the research carried out by Itri Insights, reported in Part Three, strongly suggest that since the publication of the Euromonitor survey, the views of companies on the need for greater English proficiency amongst their employees have become much more convergent with the government's vision for the role of English.

Consumer perceptions – value and fluency

Euromonitor's consumer perception analysis showed that "English is highly valued by the majority of Algerians, with 57 per cent of individuals indicating that it is important or very important because strong English skills can help secure work in key positions in multinational companies", while 27 per cent thought it was unimportant or not important at all, and 16 per cent were neutral. Yet there is a weak correlation between individuals' perceptions of the value of English and their self-evaluation of fluency in English, with only 1 per cent regarding themselves as fluent, 31 per cent as intermediate, 30 per cent as beginners, and the remaining 38 per cent stating that they did not speak English at all. When asked about the relationship between speaking English and benefits for Algeria, a significant proportion of individuals [78 per cent] felt that Algeria would benefit as a country if more people spoke English since it is an internationally used language.

Actual comments from individuals are reproduced below:

Category	Reasons Why English is Beneficial – Country
Development:	We can develop our country when we use English English helps improve the economy English is the language of technology
Trade:	English is important for international business and trade English would make access to international markets easier Speaking English helps in business and personal life
Communication:	Speaking English would be useful in dealing with European countries Learning English would be beneficial to communicate with others all over the world

Category	Reasons Why English is Beneficial – Country
Work:	There are better opportunities in business for English speakers English speakers are given priority at work and in international markets Most people speak English at work Multinational companies require English-speaking employees English makes us more efficient at work Speaking English increases our chance of finding better job opportunities English helps us get better salaries
Education:	English is the language of knowledge English is the language of education English is useful, but only in education and not in other sectors
Communication:	Speaking English will be beneficial for communicating with foreigners
General comments:	English is an internationally used language Learning English is useful but French is also beneficial for us English has become popular in our country Learning English would be useful Learning English might be slightly beneficial. We mostly speak Arabic and French

Source: Euromonitor International consumer perception analysis, 2011

The Euromonitor survey was based on data obtained from five recruitment agencies, six multinational and local companies in leading industries (agriculture, wholesale and retail trade, manufacturing, mining and quarrying, oil extraction), a snapshot of 50 printed and online job advertisements requiring English, and an unspecified number of leading English language providers along with higher education institutions. However, the report does not provide any data about the number of individuals surveyed for the consumer perception analysis or the percentages holding the opinions quoted above. It would be useful to conduct further research to obtain more up-to-date information as to whether the climate of opinion regarding the value of English in Algeria has followed these tendencies.

Urbanisation

Euromonitor identified increasing urbanisation as the key driver for the demand for English in Algeria, with 67.1 per cent of the population dwelling in urban areas with higher levels of exposure to the internet and other media, as well as "greater employment prospects and the chance of improving standards of living". (Source: Euromonitor International, 2011)

Pervasiveness of English

As well as a perception of the use value of English for employment opportunities, the demand for English from individuals can be attributed to its presence on the internet, on social media and in popular culture, particularly music culture. While it is difficult to locate hard evidence for the social and cultural demand for English, some indicative research is reported by Nesba & Brahim (2020) and by Belmihoub (2018) in a profile of the place of English in Algeria. Citing Borni (2017), he reports a small-scale study of Algerian university students, of whom 89 per cent agreed that it was important or very important for Algerians to learn English, 70 per cent used English at home and set their phones to English, and 76 per cent were not concerned about losing their cultural identity by using English.

Comparative lack of progress in raising proficiency levels in English

The increasing growth in demand for English, as evidenced above, is accompanied by low levels of attainment. Despite the government's promotion of English and the explicit shift of emphasis in the curriculum from a traditional structural approach to a communicative conception of English teaching and learning, the reality is that English continues to be 'taught to the test'. The form and content of English in the Baccalauréat (Bac) exam and the textbooks that directly serve the exam, create a negative washback on teaching, and students maintain a single-minded focus on passing the exam (Benmoussat & Benmoussat 2017). It is difficult to source data on Bac results disaggregated by subject, but overall Bac success rates increased across the curriculum by just over six per cent between 2014 and 2017.

Academic Year	2014	2015	2016	2017
Number of Candidates	657,026	623,247	818,515	761,701
Number of Bac Holders	316,212	320,072	396,264	395,853
Rate of Success	45.01%	51.36%	46.76%	51.07%

Source: Office Nationale des Statistiques 2017

As can be seen from these statistics, success rates have fluctuated and have barely risen above 50 per cent. The pre-reform rate in 2000 was 32.3 per cent, but by 2018 the success rate had only risen to 55.9 per cent (Source: Oxford Business Group 2018). The Bac English exam consists of three sections: Reading Comprehension, Mastery of Language and Written Expression. The importance of the Bac and the absence of listening and speaking tests have an inevitable impact on how English is taught in the classroom. The nature of the Bac English exam and its effect on teaching, produce problems in terms of transition to higher education. "EFL teachers at university level will find themselves facing students who only excel in reproducing faithfully exact forms of knowledge in exam seats rather than having considerable skills in dealing with the language communicatively" (Benmoussat & Benmoussat 2018).

A widely reported indicator of low levels of attainment in English in Algeria is the EF English Proficiency Index (EF EPI). "The world's largest ranking of countries and regions by English skills". In its 9th annual ranking (2019), Algeria was placed in the "very low proficiency" band, ranking 90th out of 100 countries and 10th out of 13 countries in Africa. Like the OECD Programme for International Student Assessment (PISA), the EPI has an undoubted influence on perceptions, both within Algeria and internationally. It should be noted that the methodology of the index has been questioned by some assessment experts (e.g. Villas Boas 2015), as its computer-based adaptive system tests receptive skills only, and its test population is entirely self-selecting, so may well not be statistically representative of the population as a whole. However, whatever the flaws in its assessment regime, the EPI does provide a significant indication of Algeria's standing in terms of English language proficiency.

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Research methodology

Part One

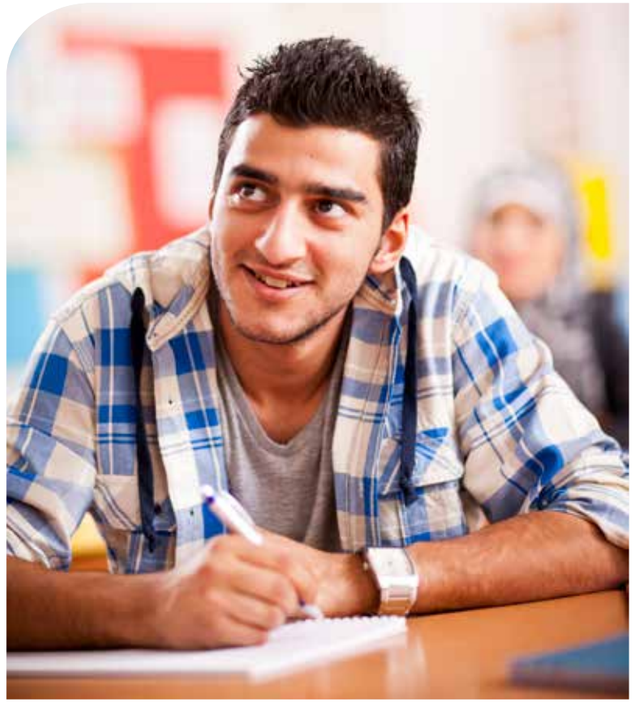
Is an extensive literature review and contextual overview, produced by Camille Jacob, a postdoctoral researcher at the University of Portsmouth, whose doctoral research examined the place of English in Algeria. (For a list of the sources surveyed, see pp. 21–24.)

Part Two

Reports on an investigation into the teaching and learning of English in the Algerian school system, conducted by Alan Pulverness, co-Director of TransformELT, who has been leading a team of consultants training middle and secondary school inspectors as part of the British Council project Supporting School Reform (SSRA) in Algeria since 2017. His report is based on available literature and in-person interviews with a key decision maker from the Ministry of National Education (MEN), a member of the Ministry's Central Inspection Team (MCIT), the Head of English at a leading Ecole Normale Supérieure (ENS) and focus group discussions with 3 primary school leaders, 12 school inspectors and 15 teachers. Visits to a number of schools in Algiers were also planned to include classroom observation and meetings with groups of teachers and groups of students, but the closure of schools and universities in the face of the COVID-19 outbreak meant that these visits had to be cancelled. Subsequent primary research was conducted remotely via online telephony and questionnaires, with responses from 160 school inspectors and over 1400 teachers. Fortunately, annual scoping studies for the SSRA project (2017–2020) have included classroom observation and meetings with teachers and students, which have also informed this part of the report.

Part Three

Evaluates the effectiveness of current English language provision for employability in Algeria. It was compiled by Amy Turner and Idriss Hadj Nacer, CEO and Chairman of Itri Insights, an Algiers-based consultancy specialising in market intelligence and strategic advice for companies doing business in Algeria. Their research is based primarily on in-depth interviews with members of the Algerian business community, though this was constrained by the effects of the pandemic, as their interviewees, business leaders and HR personnel, were preoccupied with their response to the crisis. Initially, interviews were conducted in person, and then remotely once emergency restrictions had been imposed.



3

Key findings

Our findings, described in more detail in the main body of the report, centre on these areas:

Curriculum, exams and textbooks

There is an abiding mismatch between the communicative principles and competency-based approaches explicitly advocated in the reformed national curriculum for English language teaching, and the actual teaching practices prevalent in many middle and secondary school contexts. Key factors are the final exams and the textbooks that are responsible for a classroom culture of 'teaching to the test', producing an unfocused 'general' English, whose content is ill-matched to the needs of business and industry. There is a strong case for investigating the feasibility of textbook and assessment reforms to aim for greater alignment with curriculum principles.

Teacher education

Our research points to significant differences between ENS-trained teachers and those who enter the profession from universities, as well as generational differences. Limited initial teacher preparation and constraints of time and distance on the extent of in-service training provided by school inspectors suggest the need for a concerted Continuing Professional Development (CPD) initiative to reconcile teachers' attitudes and teaching practices with the principles informing the curriculum. A review of the training and professional development currently provided by inspectors, would serve as the basis to re-focus this support system to enhance students' future employability.

Resources.

Availability of basic classroom technology in state schools is often limited and outside major cities in some cases may be non-existent. This lack of resources imposes severe limitations on what teachers can achieve with relatively large classes in the limited number of teaching hours allocated to English as learners' second foreign language. The integration of digital technology could provide effective ways of meeting these challenges. While connectivity and access to computers remain uneven across the country, mobile phone penetration (103 per cent) strongly suggests the potential for language educators to consider the integration of new technologies into their teaching at middle, secondary and tertiary levels, and there is scope for investigating this potential.

Vocational language training

Specific language needs of business, trade and industry are not well served by current provision. There is a pressing need for targeted ESP teacher training in higher education and for sector-specific materials development. Further investigation is also needed into the rapidly expanding private ELT sector in order to better understand the demand for English, what is currently being provided, for what purposes, where and to whom.

Language skills for the real world

The acquisition of English is seen by the population at large and by learners in particular as socially and professionally desirable, but the study of English is seen by most learners as a curriculum subject to be studied and an exam to be passed. Motivation for English as a language is not lacking; the lack of motivation is for English as a school subject. There is a need for learners to develop a keener awareness of real-world purposes for learning and to receive 'learner training' (learning how to learn).

4

Recommendations

A systemic approach

"...wherever reform takes place it has to be systemic not piecemeal" (Tribble 2012b).

The literature on educational change management (e.g. Fullan 1982, 1993; Fullan & Stiegelbauer 1991) strongly suggests that for educational change to take root, a systemic approach is essential. This implies that it would ultimately be unproductive to focus individually and exclusively on teacher training, professional development, teaching materials, learning resources or assessment practices without considering the nexus of interrelationships between all of these factors – what Bowers (1983) refers to as 'interlocking systems'. As Markee (1997) points out, "Curricular innovation is a complex, multidimensional phenomenon. [...] It is a socially situated activity that is affected by ethical and systemic constraints, the personal characteristics of potential adopters, the attributes of innovations, and the strategies that are used to manage change in a particular context." (Markee 1997: 39–41)

In the case of English teaching and learning in Algeria, the recommendations arising from all three parts of this report that are prioritised below should be seen ideally as complementary and should form the basis for a concerted approach. Any one of these recommendations could have a productive effect on the 'use value' of English in Algerian education. However, the effect is unlikely to have a deep impact unless interventions are planned systemically, informed by a theory of change that takes into consideration at school level, the inter-dependence of the curriculum, the textbook, the assessment regime, teacher preparation, the role of the inspectorate, teaching practices, and the need for resources. In the TVET sector, the need is for more specific language training, informed by the actual needs of business and industry. As the issue of English for employability touches on the work of three separate ministries (MEN, MESRS, MFEP), the need for liaison amongst them is also strongly implied.

Research informing the recommendations below regarding schools and TVET can be found in Parts Two and Three respectively.

Schools

Propose to MEN that they develop a textbook reform project

Textbooks at both middle and secondary levels exert a powerful influence on teachers, even many of those who understand the intentions of the competency-based approach (CBA), and are key determinants of classroom practices. If teaching and learning are to be better aligned with the pedagogic principles foregrounded in the curriculum, and if they are to better serve the aim of enhancing employability, it is essential that the textbooks are rendered fit for purpose. Drawing on broader experience from national and international contexts, such a project would need to combine local awareness and experience with external expertise.

Propose to MEN that they consider conducting a review of assessment practices

Teachers' strict adherence to the textbook and their reluctance to depart from it are driven to a large extent by a combination of time pressure and the washback effect of the final exam. A properly validated review and revision of the exam conducted in liaison with a textbook reform project would help to grant authority to new textbooks, ensure greater alignment of teaching with curriculum objectives, and promote a coherent approach to English in the curriculum, re-focused to act as a key driver for subsequent language study, whether in higher education or in vocational training.

Provide a training programme focusing specifically on the use of mobile devices for learning in ELT

Since the provision of computers for language teaching and learning is constrained by cost and uneven or erratic internet access, as well as the competing claims of Science and Technology teachers, the most practical way to integrate new technologies in the teaching and learning of English is not to focus on computers, or even tablets, but to exploit mobile phone technology. Mobile phone ownership is so pervasive (103 per cent) that 3G or 4G connectivity in locations or at times when WiFi access is unavailable, could enable teachers to exploit the potential of mobile learning. The use of such pervasive technology to enhance English language learning, is a field that merits further investigation.

TVET

Work with industry experts to design technical and industry-related vocational English language teaching

53 per cent of employers surveyed stated that they require industry-specific technical English language training for their staff, particularly in the telecoms, IT and other emerging industries. By law, all employers already have an annual budget earmarked for staff training. Working with industry experts and employers could also lead to the design of teaching programmes that more clearly meet this need and lead employers to spend on teaching that actually adds value and improves real-world communication skills.

Ensure teachers have knowledge of the sector-specific target material for which they are providing vocational English

The abundant literature on ESP provision in universities consistently points to a lack of knowledge about the industry-specific target materials used in vocational teaching, leading to a loss of engagement from students who may not see the training as pertinent to their professional development. This is compounded by the lack of subject specialist teachers, with English graduates generally filling these

posts with no prior teacher training or subject knowledge of the discipline they are supposed to teach. 100 per cent of research and teaching staff and postgraduate students interviewed across the country stated that they needed more support for writing, presenting and publishing in English, which is becoming a requirement for all academic fields. Providing teachers with the tools to understand industry topics in more depth, or enabling teachers to specialise in particular industry segments, may reduce the impact of this constraint.

Ensure teachers are trained on teaching English for Specific Purposes (ESP)

The abundant literature on ESP provision in universities shows that teachers in Algeria are not routinely trained in approaches designed for learners who use English for a specific business purpose. On the business side, some employers report that they have difficulty finding candidates with appropriate language skills and they find that current vocational solutions do not provide the required results. Ensuring that teachers are trained in ESP teaching techniques may lead to increased employer/employee satisfaction with current vocational teaching provision.

Equip language learners with the tools to learn and set expectations

One employer who was interviewed in detail suggested that Algerian learners in general, and particularly those who are already part of the active workforce, may not have been provided with the tools during their school and university education to allow them to learn effectively. He suggested that learners may not understand the approaches that will enable them to succeed, may not understand the time or commitment required to achieve language proficiency and may become discouraged if they do not see results in the short term. At least three employers interviewed suggested that a lack of motivation was a factor that led to poor learning outcomes.

Provide fast-track or intensive solutions

Employers require experienced employees with English language competencies today, but do not expect to find them on the Algerian labour market for some years. The employers surveyed estimate that they advertise a joint total of 132 job vacancies in an average year that have written English as a mandatory requirement. 47 per cent of these companies suggested that they would need to hire *slightly more* English speakers in the next five years than in the last five years, while 33 per cent said they would need to hire *many more* English speakers in the next five years than in the last five years. This appears to suggest that demand for English speakers may be growing within the Algerian job market. The remaining 20 per cent of survey respondents indicated that they expect to hire the same number of English speakers in the next five years as in the last five years, but no companies suggested that they would hire fewer English speakers in future. Where practicable, intensive courses or fast-track solutions may assist employers in training up their existing experienced staff today, as they wait for junior talent to come through.

Consider SMEs, not just large companies

Algeria's economy is intrinsically concentrated, with a large portion of economic and commercial activity in the hands of a small number of actors. However, given the historic lack of English language skills available on the Algerian job market, many multinational employers have "lowered their standards" for Algeria and/or dealing with tasks requiring English overseas. At least four of the employers interviewed in detail made statements to this effect. Small and medium-sized enterprises (SMEs) do not have this option available to them, and if they want to compete internationally, they must nurture their own English language skills inside Algeria. These companies exist in increasing numbers, particularly in high-demand sectors such as IT and could constitute a significant, if fragmented, potential market.

Diversify the provision of training that leads to certification

Some employers believe that certificates are often worth relatively little as a guarantee of quality teaching and learning. At least two employers interviewed report that training certificates in general, and language certificates in particular, are often "not worth the paper they on which they are written". However, they understand that many employees do still prefer to take training that leads to certification and they sometimes use this as a means of attracting and retaining employees. This point of view is shared by some of Algeria's institutional stakeholders, such as representatives of the CNEPD. Courses that lead to certification are likely to continue to be popular in the coming years as approaches to recruitment and competition in the job market and the economy as a whole, may take a significant period of time to evolve.

Raise the profile of English-speaking culture with cultural events

At least three employers interviewed stated that one of the obstacles facing staff required to speak English in the workplace, is the lack of opportunities to experience language in a natural environment and sometimes a lack of desire to learn. Boosting the profile of English-speaking culture and creating a more engaged ecosystem around the learning of the English language in Algeria, could contribute to alleviating these issues and act as a vector for all things 'English' in Algeria.

Alan Pulverness, TransformELT

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Research in detail

Part One
Literature review and contextual overview

Camille Jacob

1

General context: demand for English in Algeria

Research on English in the world generally points to tourism, international trade, the presence of multinationals and higher education as drivers for increased use of English (see for instance Jenkins et al., 2011). One of the big questions for Algeria is to understand what exactly is needed. Are there specific needs and demands?

Discourse about English replacing French in the Maghreb is not new (Battenburg, 1997; Daoud, 2001; Sadiqi, 1991), and the British Council published several reports 'predicting the displacement of French by English' in Algeria, in the late 1970s and early 1980s (Benrabah, 2013, p. 95). The most well-known large-scale example of change in the medium of instruction in Algeria was the 1992 pilot reform, abandoned in 1994, which gave parents the choice between French and English as the first foreign language to be taught in the second year of primary schools. There is very little published information on take-up, which wilayat were chosen for the pilot, or what resources were put in place for teachers. Nonetheless, the 1992–1994 reform and the reasons for its short lifespan continue to provide a lightning rod for political discussions about language, with many claims from the French government and the French-speaking Algerian elite being directly responsible for thwarting the reforms (Manseur, 2017).

Research on English in Algeria often starts from the position that English is in competition with French, in keeping with many academic traditions in the Middle East and North Africa focusing on diglossia and conflict as the main way of understanding language dynamics. To a certain extent, the overarching focus on conflict and competition in titles is misleading. The findings from these studies point to additive multilingualism, hybridity and the promotion of the use of English in addition to other languages, not as a replacement (e.g. Benrabah, 2014; Ounis, 2012).

Nonetheless, the overarching focus on the question of language replacement has translated methodologically to a reliance on surveys asking questions about attitudes towards different languages. The surveys are mainly administered in schools and universities, although there are a few examples of research on language attitudes or language training conducted in companies (Benbachir, 2013; Guerid, 2019; Kermadi-Benatta, 2016).

There is practically no research on *actual* English language use, especially outside the classroom, and therefore data regarding practices has to be gleaned from existing research focusing mostly on French and Arabic. Whether in music, football chants, or graffiti, although English is increasingly used, it seems to remain marginal compared to Darija, French and Fuṣḥa (Amara, 2012; Davies & Bentahila, 2006, 2008; Mezahi, 2019; Ouaras, 2009, 2018). Considering the importance placed on "the new generation" and social media when people talk about the increased interest for English, there is also very little research into what is actually happening online with English. Existing research is not recent and only mentions English as a small part of online linguistic practices (Achour-Kallel, 2012; Aci, 2013; Aouina, 2013; Bagui, 2016; Bengoua, 2016; Daoudi, 2011; Gonzalez-Quijano, 2012; Hawkins, 2008; Miller & Caubet, 2010). Nonetheless, attitudes towards the effects of social media use on English language competences are broadly negative. For instance, in two different studies conducted at Adrar University, between half and three quarters of undergraduate and graduate students believed that their use of social media had a negative impact on their writing skills (Bagui, 2016, pp. 26–30; Herizi, 2019, pp. 48–50).

Some of the existing research points to potential contradictions between increased demands for

English, and low actual use or daily need. For instance, in a 2012 Euromonitor survey of attitudes concerning English in Algeria, although 78 per cent of people surveyed agreed that the country would benefit if Algerians spoke English, this did not translate into individuals seeing the language as relevant for their own personal or professional lives (2012, pp. 81–87). Ethnographic data also shows a disconnect between people's claims of English being very important and the absence of any use of the language outside the classroom in their family and friendship circles when probed, as well as a tendency to describe others (other regions and an ever-shifting "younger generation") as more English-speaking (Jacob, 2019, pp. 133–136).

2

National education

There are large enduring disparities between Southern and Northern wilayat, between rural and urban areas, and between public and the growing number of private schools in terms of attainment. Some of the reasons put forward include differences in parental involvement, smaller class sizes allowing for more learner-centred approaches in private schools, pupils' lack of motivation to learn English, recruitment difficulties, a lack of resources in rural areas and the rarity of inspectors visits to schools in remote areas (Ferroukhi & Sellami, 2017; Lahmar, 2019; M. Torchaoui, 2016; N. Torchaoui, 2019). In one study, nearly one quarter of middle school teachers who had been teaching less than five years said they planned on leaving the profession (Bia, 2016). While this figure remains low compared to England, where one third of teachers leave the profession within their first five years (Worth, 2018), it impacts on recruitment in areas with fewer candidates. Although communicative and competency-based approaches have been privileged in the curriculum since 2003, these reforms have so far had limited impact on classroom practices. Classroom observations, interviews and surveys across the country largely show a continuation of traditional teacher-centred methods (Bassou, 2015; Koubci, 2018; Moussaoui, 2019; Zourez, 2017). Most recommendations follow suggestions based on these approaches, such as reducing teacher talk and increasing learners' autonomy and confidence through scaffolding, differentiation, explicitly teaching learning strategies, and more communicative and cooperative activities (e.g. Khelifi, 2013; Moussaoui, 2019).

Zourez (2017) suggests that these reforms were a case of "new teaching approach, new textbooks, and little training" (2017, p. 206). The question of adequate professional training is a recurrent concern in the literature. A minority of teachers have been trained in one of the eleven Ecoles Normales Supérieures, where they would have spent four or five years (for middle school and secondary school teachers respectively) developing their subject knowledge and their pedagogical skills through university-based modules and two short teaching placements. The vast majority of teachers are English graduates, where they might have received theoretical training regarding Teaching English as a Foreign Language (TEFL) but no classroom practice (Gacem, 2016, pp. 24–32). Inquiring specifically into the type of pre-service and in-service training undertaken by teachers, Messaoudi (2018) notes that 75 per cent of teachers surveyed had never received any classroom-based training prior to taking up their posts. Similarly, because in-service training was organised during school holidays, beginner teachers continued to receive mostly theoretical pedagogical training. In the wilaya of Mila, in the north-east of the country, teachers claimed that their professional development strategies consisted of training themselves via the textbook, learning from their own reading, and learning from colleagues. Occasional contacts with inspectors came last on the list for these teachers (Zourez, 2017, pp. 178–182). Classroom observations show a difference in teachers' implementation of competency-based and communicative approaches, with untrained teachers much more likely to use traditional methods and rely solely on the textbook (Belkheir, 2017; Mirza, 2017). In his study of English teachers across the wilaya of Oran, Belkheir (2017) found that 65 per cent did not use any additional materials to teach pronunciation, even though they were dissatisfied with the textbook, and that the only training they had received on teaching pronunciation related to a specific exam question (2017, pp. 2357–2359). For further information see Part Two of this report.

There is an overlap between the public system and private language schools, as teachers from the public sector also teach in language schools and online (Jacob, 2019, pp. 111–112). There are no official figures or estimates to quantify the proportion of teachers also teaching in private language schools.

3

Vocational education

The vocational education sector currently covers five levels of certification (from 12 to 30 months) across 23 branches, subdivided into 295 specialisms (Ministère de la Formation et de l'Enseignement Professionnels, 2019). In addition, a vocational baccalaureate (*baccalauréat professionnel*) is planned to open in certain wilayat from September 2020. The small number of employability-focused undergraduate degrees (mostly called *licence professionnalisante* although some are labelled *licence professionnelle*) currently being piloted, fall under the Ministry of Higher Education and Scientific Research (MESRS). In February, the Minister for Vocational Training and Education Hoyam Benfriha stated that consolidating links between the vocational, national and higher education sectors was a priority (Algérie Presse Service, 2020). Higher education staff involved in the early vocational degrees regretted that uptake was low despite the higher employment prospects and that therefore they did not continue past their trial period (Oukaci, 2020).

There is no standardised requirement for the provision of English for Specific Purposes (ESP), and existing research on vocational education comes mostly from Business and Economics departments and does not explicitly mention English. Nonetheless, the *licences professionalisantes* being trialled under the Erasmus+ COFFEE project (*Co-construction d'une Offre de Formation à Finalité d'Employabilité Elevée*) include English as one of the five units of transversal training (Université de Montpellier, n.d.). The EU delegation is also involved in the assessment of professional training through the AFEQ programme *(Programme d'appui à l'Adéquation Formation – Emploi – Qualification)*, although English language skills are not mentioned (Ministère du Travail, de l'Emploi et de la Sécurité Sociale, n.d.).

4

Higher education

Narratives of discontent with the higher education system as a whole frame analyses of English language provision in higher education, as criticisms are often repeated across disciplines. Discussing their experience as lecturers in public and private universities in Algeria over the past decades, Benleulmi and Hadiby-Ghoul (2015, pp. 9–60) are representative of the combination of factors frequently highlighted:

- Learner-related: a drop in skills and knowledge of incoming students, their low motivation due to the lack of job opportunities, the fact that the best pupils go to the most prestigious institutions and courses (*classes préparatoires,* École Polytechnique, Medicine, Pharmacy, etc.)
- Teacher-related: massification of education leading to hasty recruitment of teaching staff and therefore lower overall levels of pedagogical and scientific knowledge
- Structural: poor implementation of the *Licence – Master – Doctorat* (LMD) reforms and low-quality control, the absence of preparation for the job market because companies are not interested in collaborations.

One comparative study into English writing skills points specifically to the higher competences of graduates of the "classical system" (as opposed to LMD) (Belalem, 2017). Reasons invoked for the low level of English language skills at secondary level, such as class sizes, absence of equipment, lack of pedagogical training, and teacher-centred rote learning methods, are also invoked in higher education (e.g. Bouazid & Le Roux, 2014, pp. 888–892; Boukhari, 2019, pp. 38–45; Rezig, 2011, pp. 1330–1332). As English language graduates provide the vast majority of teachers in middle and secondary schools as well as English for Specific Purposes (ESP) teachers across higher education, concerns over their language skills and lack of pedagogical training have an impact across the education sector as a whole.

Although an English language module is a requirement for undergraduate and postgraduate degrees, there are no national guidelines on ESP in Algeria, either in terms of objectives, curriculum or number of hours. There is a wide variation in the availability and content of these modules (see for instance Saoud, 2017, pp. 200–201). There are also large variations not only between disciplines, but also year on year and between students of the same cohort. Recruitment difficulties and budgetary restrictions mean that teaching staff who go on maternity leave or retire are not always replaced (Jacob, 2019, p. 105). In addition, many students do not see these modules as a priority (Bensaci, 2013; Hachelaf, 2019), and ESP teachers themselves are often not considered as members of their departments (Jacob, 2019, p. 106). Research undertaken across the country into improving the delivery of ESP courses in various disciplines (Bengrine, 2019; Guerid, 2019; Hachelaf, 2019; Hadji, 2013; N. Messaoudi, 2019; Saadi, 2015) all agree in suggesting the following:

- Design syllabus based on specific needs, avoiding "general English" and content unrelated to skills for the workplace
- Train teachers: both in terms of pedagogical skills and to enable subject specialists to also teach English (rather than relying on English graduates).

These questions are explored further on pp. 62–63 of this report.

Recent reforms require publications in international peer-reviewed journals as part of PhD submission and for academic promotion, in addition to participation in international conferences. English is seen by nearly all staff, students and alumni (from different departments) as important for accessing information

and increasing the visibility of research. This has translated into a variety of practices, from English language courses being set up by institutions to academics writing a paper in Arabic or French before using an online translation tool, or using their postgraduate students for the same purpose (Jacob, 2019, p. 104).

A current call for proposals from the Strategic Impact Evaluation Fund (SIEF) has announced that the British Embassy in Algiers is funding a project on "skilling youth for work implemented by International Labour Organization (ILO), and aims to set up a joint Commission on Higher Education, which will have a focus on employability and expanding English language teaching" (SIEF 2 April 2020).

5

Private sector

There is practically no research on this topic, as the majority of publications and dissertations/theses focus on specific pedagogical points in secondary or higher education, or on language attitudes.

The most visible sign of interest for learning English is the number of language schools across the country, which has grown exponentially since the early 2000s (Souames, 2013). Some schools that have been established for longer have opened sister schools in other wilayat (e.g. In-Tuition) or in other parts of the same city (e.g. BBC School in Algiers). The majority also teach languages other than English, although a growing number are specialising in English only. Some of the language schools specialising in English also offer Business English courses (e.g. Shane School and ABI School in Algiers), but the vast majority seem to only offer 'General English'. Pilot classes for a private British school were opened in 2019 by Alligan at the offices of the British Institute for English in Algiers; they currently follow the Algerian curriculum with additional English.

Algiers, Oran and Hassi Messaoud are the most common locations for language schools to expand to (e.g. Berlitz, British Study Centres, Algeria Learning Centres), but there are many smaller language schools all over the country. One language school manager based in Algiers reported having been contacted by several schools in Sétif and Chlef, all claiming to be "the biggest in the town" and interested in partnerships with more experienced schools and international accreditation. In interviews with managers from seven language schools from different wilayat, all pointed to the fact that their classes were oversubscribed as a testament to the "thirst for English". They also derided some of their competitors as being only "money-making initiatives", reaping the monetary rewards of their relative scarcity and novelty without providing their students with quality learning opportunities.

While nearly all age groups can be found in private language schools, the level of classes suggests that participation is not sustained across many years. Classes cover all age groups from the second half of primary school to adults, although some institutions also offer intensive play-based courses for younger children. Although theoretically offering all levels from complete beginners to advanced, the vast majority of groups fall within the "false beginner" to "early intermediate" categories (A1–A2 to B1 in the Common European Framework for Languages – CEFR). This is remarkably consistent in all language schools visited, and conversation or advanced classes (C level in the CEFR) are nearly exclusively found in para-tertiary education spaces (such as student clubs).

Observations in language schools and interviews with school managers and teachers across the country highlighted three main categories of learners:

- children (mostly 7–17) whose parents register them in a language school
- well-to-do students, especially from English departments, who either feel they are struggling at university or not learning enough in their lectures
- professionals who require English for their job, with some welcoming the opportunity and others resenting the obligation.

One small-scale study of adult learners following an intensive Business English class in El Oued found that they were professionals who had turned to private tuition to fill the gaps from their school and university education and especially the lack of ESP provision (Ghedeir Brahim & Nesba, 2017). A study of 150 adult learners of French in private schools in Biskra similarly highlighted that learners had turned to the private sector because of their dissatisfaction with the standards at university (Bedjaoui, 2019, pp. 18–19).

1. The additional data in this section has been obtained from observations in seven language schools in Algiers, Ouargla and Tlemcen as well as over forty interviews with teachers from private language schools from across the country at various stages of their careers.

Language school staff are noticing a steep increase in the number of children learning English, with remarks that parents were bringing their children at an ever-younger age[1]. In some cases, the children are being educated in private schools and are already taught English as part of the primary curriculum but not to a standard deemed acceptable by their parents. When asked, all school managers and teachers said that the children whose parents paid for English classes already spoke French. In the words of one manager from Algiers: "I told you that the problem is that people are not practising the language, especially, well, English or French, because people, I told you last time, people who are good at French, let's say whose parents are good at French, are here to learn English, because their parents experienced having difficulties with English.

People who don't speak French, their children have difficulties at school, so they are here to learn French." Similarly, managers from two language schools in the South reported that although they had wanted to focus on teaching English, it was not commercially viable at this stage (2017) and they also had to provide French and Science lessons.

Teaching staff is mostly composed of English graduates, with some teachers from the state sector and a few British women married to Algerians (mostly in Algiers and Oran). There is a high turnover of staff, and it is common to find even young teachers with only a few years' experience having worked for several different language schools. This is particularly true in Algiers, where the number of language schools is already high and ever-increasing and allows these teachers easily to look for better working conditions, a more convenient location and/or higher pay elsewhere.

6

Informal settings

As mentioned above, there is no research beyond anecdotal data into how social media and the internet are actually used in relation to English.

The English language scene in and around universities is vibrant and includes weekly English-speaking clubs, events partly or wholly in English, and international organisations such as AIESEC (Jacob, 2019, pp. 107–110, 115–119). In all higher education institutions visited in person and surveyed online across the country, whether teacher training-focused, humanities campuses or science and technology specialists, students had set up English clubs which operated on the university premises. The exact description and purpose of these clubs varies, but their overarching aim is always to provide an English-speaking space. Nonetheless, workshop facilitators and organisers involved in clubs and events across different campuses noted that students from STEM subjects were more proactive in seeking opportunities to speak and hear English, and their overall level was generally higher, compared to students of Law and Humanities (which are also the disciplines with the lowest entry requirements).

Free ESP classes (e.g. medical English, English for Pharmacy) are offered by volunteers at the American Cultural Centre in Algiers.

7

Challenges and areas for further study

As mentioned at the beginning of Part One, it remains unclear from the academic literature whether the attitudes and opinions expressed towards English simply refract global discourses of English as "the international language", "the language of development" and "the language of science", or whether they reflect actual local needs and practices (and what those needs and practices are).

- While there is a wealth of research into teaching practices in secondary and higher education and general attitudes towards English, there is practically no research into actual language use, including how English is used on social media, or what English language content is being consumed, how and by whom
- Further investigation would also be needed into the rapidly expanding private ELT sector in order to better understand the demand for English (including current needs and skills), what is currently being provided, where and to whom
- There is also a dire need for research into English language use in the workplace, in terms of current practices in companies and possible future needs, as well as what is happening in vocational education. This would ensure a better fit between ESP provision in universities and the workplace
- With the 1992–1994 primary school reforms so poorly understood, further research into the implementation process and challenges to the reforms would be needed before undertaking any work at primary level. Research into repeated medium of instruction changes and their challenges over the past two decades in Rwanda and Madagascar would also be necessary to situate calls for such change in other contexts.

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Primary research

Part Two
English language education

Alan Pulverness, TransformELT

1

The Algerian education system

1.1 Structure of the educational system

The Algerian education system consists of the following levels:

- Preparatory (non-compulsory) for children aged 5
- Basic comprising primary (5 years) and middle (4 years) schools
- Post-basic education includes two pathways:

  "general and technological secondary education", a pre-university route for secondary schools (3 years). This falls under the aegis of the Ministry of National Education (MEN)

  "professional education" comprising two cycles: "vocational" (3 years) and "higher professional" (2 years). This is the responsibility of the Ministry of Training and Professional Education (MFEP)

- Vocational training is also the responsibility of the MFEP, and includes:

  initial vocational training (FPI) which aims to absorb educational wastage at different levels

  continuing training while in employment (FPCE)

- Higher education is under the direction of the Ministry of Higher Education and Scientific Research (MESRS).

[See diagram in Appendix 1]

1.2 Student population and learning outcomes

In 2019, nearly 9.3 million students, including more than 4 million girls, were enrolled in schools. More than 4.5 million children were enrolled in primary and middle schools, including more than 2 million girls, and in secondary schools, more than 4.5 million pupils, including more than 800,000 girls. These 9.3 million students were in 27,000 schools: 19,000 primary schools, 5,000 middle schools and 3,000 secondary schools (Oxford Business Group 2018).

In the most recent breakdown available (2017), teaching was provided by nearly 417,600 teachers, including more than 282,300 women. Primary schools employed nearly 166,750 teachers, of whom nearly 120,000 were women, more than 253 women per 100 men. In middle schools, there were more than 151,000 teachers, including more than 101,000 women; in secondary schools there were nearly 100,000 teachers, including nearly 62,000 women. Women outnumber men at all levels of education. Over 36,000 new teachers were recruited for the 2017–18 school year, following the mass recruitment of 93,000 new teachers in 2016 (Oxford Business Group 2018) and as retirement depletes the teaching population, 40,000 new teachers continue to be recruited each year (Linklater 2018).

The 2019 EF English Proficiency Index (EF EPI) places Algeria in the 'very low proficiency' band, 10th out of 13 African countries and 90th out of 100 countries worldwide, described as in the EPI report as a 'modest improvement' since 2018. However, it should be noted that although the EPI online adaptive test shows high correlations with both IELTS and TOEFL, it is based on test results from populations of test takers who have opted to enter, and its methodology relies solely on tests of receptive skills.

The introduction to the Education Law sets "a number of medium- and long-term objectives, including significant improvement of success rates in school examinations (between 70 per cent and 80 per cent)". Exam results, both in the Brevet and the Bac, continue to fall far short of the target of 70 per cent exam success, let alone the 80 per cent threshold (Coffey 2917; Benmoussat & Benmoussat 2018).

This study is worth quoting at length:

> The major goal underpinning English teaching in Algeria is to make learners able to communicate, express their ideas, argue, maintain discussions and avoid discussion breakdowns. Yet, sometimes, what is prescribed as objectives and goals is just ink on paper. Unfortunately, at present time, the immediate goal and the principle motivation for pupils to learn English is to pass examinations. This shift in interest has led to the emergence of successful learners on exam seats but ineffective and very incompetent ones in real life context. Moreover, the success of learners in high-stakes exams, such as the Baccalaureate exam, will afford them an opportunity to enter university and embark on a higher education. As an immediate deleterious result, EFL teachers at university level will find themselves facing students who only excel in reproducing faithfully exact forms of knowledge in exam seats rather than having considerable skills in dealing with the language communicatively.

2

Foreign language education

2.1 Education reform

The educational reform initiated under President Bouteflika in 2000 was intended to achieve a comprehensive overhaul of the education system. The programme for reform, which began to be implemented in earnest in 2003–4, addressed general reorganisation of the system and teacher preparation as well as pedagogical principles and practice.

Foreign language education was emphasised as an essential means of allowing access to "universal knowledge and know-how", with equal importance accorded to French and English, a plan to introduce a third foreign language in the literary stream at secondary level, and the intention to introduce English at primary school.

The equal status for French and English aimed at in the reform needs to be seen against the backdrop of ongoing debate over the competing claims of the two languages. In August 2019, Higher Education Minister, Tayeb Bouzid, urged the country's 77 universities and HE institutions to favour English, declaring that "French does not get us anywhere". The debate is highly politicised, complicated by Algeria's colonial history, and further complicated by the contrast between Algerian Arabic and Modern Standard Arabic (MSA), and by efforts since the 1970s at Arabisation in education (confirmed as recently as 2018). As well as being the language of a significant segment of business and of culture, French is deeply embedded in spoken discourse, with speakers constantly code-switching, often within a single utterance. French is seen by many Algerians as a unifying factor across the Maghreb, and Algeria continues to have a strong orientation towards France: "Thousands of Algerians take French language exams each year to be eligible to apply for admission to universities in France. About 23,000 Algerians are enrolled in French universities, making up eight per cent of France's foreign students" (Ghanmi 2019). The move towards English is seen, on the one hand, as a means of gaining improved access to scientific research, business opportunities and employment, and on the other, in the words of former minister Mourad Benachnou, a move away from French is viewed as "linguistic and cultural suicide". This 'language war' is even seen by some commentators as a way of driving a wedge amongst the protestors, who until the outbreak of Covid-19 were continuing their weekly demonstrations.

The intention to introduce English at primary school was confirmed in our interview with a key MEN decision maker and a member of the Ministry's Central Inspection Team (MCIT); however, from a ministry perspective this remains at the level of intention, with no definite timetable to launch the early years teaching of English. It is worth noting that on the MEN website this aspect of the reform is still hedged with the reservation that it would be dependent on available resources as well as those that can be developed.

The aim of introducing English at primary level was broadly welcomed by the three primary school principals we interviewed. Apart from the obvious implication of the need for teacher training, they were concerned about the impact on teachers' workload and the adjustments that would have to be made to the existing curriculum. They also suggested that school principals would also benefit from training (language improvement), as unlike their counterparts in middle and secondary schools, principals at primary level have a pedagogical as well as an administrative role. It is worth noting here that middle school teachers interviewed expressed their concerns about continuity between primary and middle schools, as contact between the two currently tends to be related to administrative rather than pedagogical issues.

In previous discussions with MEN representatives during our work on the British Council project Supporting School Reform in Algeria (SSRA) (2017–2020), the same MEN decision maker had also referred to the goal of introducing a Content and Language Integrated Learning (CLIL) approach in the science stream at secondary level, which would serve as foundational preparation for the eventual use of English as a Medium of Instruction (EMI) in higher education. When questioned as to whether this plan was any closer to fruition, he confirmed that the plan was still on the table, but without any agreed schedule. The recent replacement of the Minister of Education in the wake of the President's resignation in 2019 has clearly left some aspects of the reform in abeyance, and it remains to be seen to what extent they might be reactivated by the new administration.

Given the pressure felt by teachers that produces a pedagogic culture of 'teaching to the test' it was not possible to introduce the kind of strong ESP approach that the MEN had initially envisaged, and we sought a compromise solution by encouraging the inspectors (and by extension their teachers) to focus on identifying affordances within the textbook for relating productive language skills to STEM-related topics.

The reform proclaimed a fundamental change in the orientation of language teaching in terms of overarching principle, moving away from *Pédagogie Par Objectifs* (PPO – goal-based pedagogy) to a Competency-Based Approach (CBA). Teachers were confronted with a requirement for a paradigm shift in their approach to teaching English and were expected to focus on procedural knowledge, the skills their learners need to use the language, rather than declarative knowledge about the language (Newell 1972; Anderson 1976; Paradis 2009). Responses from teachers interviewed in 2014 were peppered with obligatory references to CBA, but there was little or no evidence of the approach in the lessons we observed in either middle or secondary classrooms. Colleagues at Itri Insights, who report on vocational language learning below, have pointed out that resistance to a skills-based approach is not confined to education, but is characteristic of business culture at large, with employers hiring staff often more concerned with certification than with demonstrable practical skills.

2.2 Teaching and learning

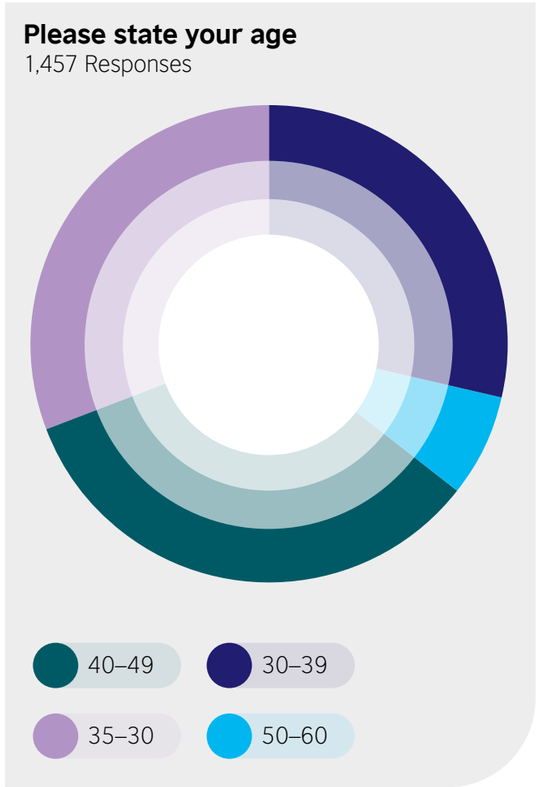
2.2.1 Curriculum, textbooks and in-service training

I trained Algerian middle school inspectors for the Norwich Institute for Language Education (NILE) in the UK and Algeria in 2013–14, and subsequently trained middle and secondary school inspectors on the British Council SSRA project (2017–20). Since 2018 the SSRA project has focused on the needs of secondary teachers for teaching productive language skills (speaking and writing) within the science stream with a particular emphasis on language for STEM subjects. Given the pressure felt by teachers that produce a pedagogic culture of 'teaching to the test' it was not possible to introduce the kind of strong ESP approach that the MEN had initially envisaged, and we sought a compromise solution by encouraging the inspectors (and by extension their teachers) to focus on identifying affordances within the textbook for relating productive language skills to STEM-related topics.

Each phase of the SSRA project began with a scoping exercise which included classroom observation and meetings with teachers and students. Unfortunately, the Covid-19 outbreak meant that school visits planned for this study had to be cancelled. In lessons observed in a range of schools, albeit confined to Algiers for security reasons, over the past two years, there has been very limited evidence of the impact of the cascade by the inspectors we have been training. The majority of the teachers we have seen adhere to a traditional classroom model of textbook-based, teacher-fronted lessons, with hardly any opportunities in the lesson for learners to use the language independently. The inspectors, by contrast, have largely been able to take on board new methodology in the 'safe space' of the training room, and they have been diligently acting as multipliers with teachers in their local contexts.

There are a limited number of possible reasons for the apparently 'trickle-down' effect of inspector training. As reported in Part One, school visits by inspectors and training workshops for teachers are at best infrequent and in the case of schools in particularly remote areas, a rarity, despite the inspectors' best efforts, they are working with teachers who feel they are under strong institutional pressure to follow the curriculum by sticking rigidly to the textbook, which functions as a de facto syllabus. Age is also a factor, with younger teachers often more prepared to take pedagogical risks and older teachers reluctant to step outside a long-established comfort zone. As can be seen from over 1,400 responses to our questionnaire, there appears to be a fairly even split across the age ranges of 25 to 50:

It must also be acknowledged that when it comes to



tried and tested professional routines, change takes time: even teachers who are willing in principle to try out new practices, need time first to take tentative steps, then gradually to relinquish some of the security of a teacher-centred approach, to begin to accommodate changes, and ultimately to assimilate them. In our admittedly limited experience, we have seen evidence of this necessarily slow uptake in some of the classrooms visited in October 2019, compared with lessons observed two years earlier.

Hassani (2013), reporting on teachers' difficulties in adopting CBA, points to "a kind of deafness" as the major obstacle to teachers engaging with the reform. She identifies various factors responsible for pedagogical inertia when teachers are challenged by new concepts:

- The concepts of capacity and competence are almost completely confused
- The competency-based approach in education is a 'work in progress' which is poorly defined and poorly evaluated
- Some teachers who are prepared to integrate CBA complain of the lack of resources and the conditions for its effective application, often citing time pressure (3 classes per week), lack of ICT resources and class size (up to 40 students in a class) as not being conducive to a methodology that promotes social constructivism (Williams & Burden 1997) and experiential learning (Kolb 1984)
- Examinations remain directed at the assessment of knowledge rather than skills.

The MEN decision maker, while asserting the centrality of the textbook, maintained that teachers should regard it as a framework rather than a straitjacket. He stressed the importance of teacher flexibility in the use of the textbook as an instrument for working towards curriculum goals. He further emphasised the importance of teachers seeing new approaches as integral to the curriculum rather than as an additional element to add to their workload. There is, however, a marked disconnect between this vision and the responses of teachers interviewed in the course of previous scoping studies. Many of the teachers we spoke to find it difficult to reconcile the principles foregrounded in the curriculum with what they experience as a system mediated by textbooks that they perceive as directed exclusively at exam preparation.

The disparity between the principles enshrined in the curriculum and the day-to-day reality of teachers' inability to concretise the spirit of the curriculum is exacerbated even for the most conscientious teachers by a widespread lack of basic resources. The latest available figures, shown in the table below, indicate a growing provision of IT resources; however, inspectors and teachers informed us that these

resources tend largely to be reserved for STEM subject classes, and are rarely, if ever, available for English classes. Where online material or video is used by teachers of English, it is only possible when teachers are able to bring their own laptops to the class.

IT resources in schools			
Level	Computer laboratories	Computers	Internet connection
Primary	672	4,850	308
Middle	3,463	46,316	2,450
Secondary	3,055	41,943	2,061
TOTAL	7,190	93,109	4,819

Source: MEN annual statistics 2017

In fact, listening is a core language skill that is adversely affected in poorly resourced English language classrooms. In the classes we have observed since 2017, listening material has either been read aloud by the teacher or has been artificially generated by a digital voice synthesiser.

In a focus group discussion, a group of 12 middle and secondary school English inspectors identified the following areas for improvement:

- An increased focus on technical content
- Clearer identification of real-world language needs
- Closer cooperation between middle school and secondary school inspectors
- Greater cohesion between middle and secondary school
- Updating textbook and exam content
- Increased focus on productive skills
- Boosting teachers' self-confidence
- Improving classroom resources.

Survey questionnaires (Appendix 2) sent out to middle and secondary inspectors and teachers elicited substantial responses (Appendix 3) from 160 inspectors, evenly spread between middle and secondary schools, and 1,458 teachers, 60 per cent of whom were secondary teachers. When asked about the extent to which teachers felt free to adapt or supplement their textbooks, almost 20 per cent of the teachers felt almost totally free, while just over 30 per cent of the inspectors expected their teachers to express this degree of freedom.

In addition to the areas listed above, the inspectors focused on the need to develop 21st century skills, particularly critical reading skills, communicative skills and teamwork, all of which are excluded by the dominant English teaching paradigm perpetuated by negative washback from the final exam, combined with textbooks that encourage teachers to 'teach to the test'. A similar view was expressed by a group of 15 middle and secondary English teachers in the course of a focus group discussion, though with reservations about the feasibility of developing these skills adequately in relatively large classes.

The inspectors also highlighted the potential benefits of teachers from different wilayat meeting to work collaboratively and exchange ideas and share experiences in order to develop mutual support in the application of new approaches. However, at present, the constraints of time and timetables mean that this kind of collaboration is an infrequent occurrence.

2.2.2 Survey: Inspectors and Teachers

It should be noted that the survey questionnaires were circulated when it was not possible to get Ministry approval at short notice in order to follow up the focus group discussions with further in-depth interviews. Hence, the questionnaires consisted largely of open questions with space for long text answers in order to obtain as representative a range as possible of qualitative data. A few representative examples are included here, with a larger selection to be found in Appendix 3.

Inspectors

Most of the inspectors identified their teachers' greatest strengths as teaching grammar and receptive skills, and productive skills (especially writing), as the most challenging for them.

Asked about the differences between their teachers' classes and their own school experience, a small minority of the inspectors characterised their teachers in very positive terms, e.g. "Today, classes are somewhat more communicative, learner-centred, based on active teaching/learning strategies, competency-based", while the majority identified constraints and obstacles, e.g. "C.B.A is too demanding. Learners need a lot of material, time, space to learn."

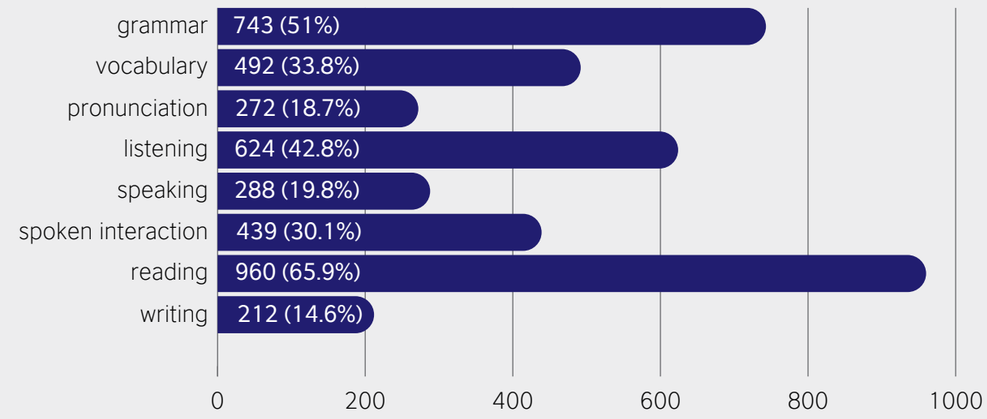
As for technology (video, ICT, online resources) there was a clear division between those inspectors whose teachers made extensive use of technology (at least of video) and those who identified a generational divide, a view vividly expressed in this response: "There are two generations of teachers. The digital immigrants and the digital natives. The first generation use the pen and the board. They don't want to take risks. They resist any change. The latter try to use the ICTs but they don't know what, how, when and why of using that technology".

When inspectors were asked to predict what use students would have for English in the future, apart from general comments about English as a world language, the majority of responses specified the need for English for Academic Purposes at university. In answer to a more specific question about the kinds of jobs in which students would need to use English, some responses were extremely vague, e.g. "In almost all kinds of jobs" or "doubtful that English would ever displace French", while others identified broad sectors of business and industry, e.g. "Marketing, business activities, computing, medical fields, tourism agencies, interpreting".

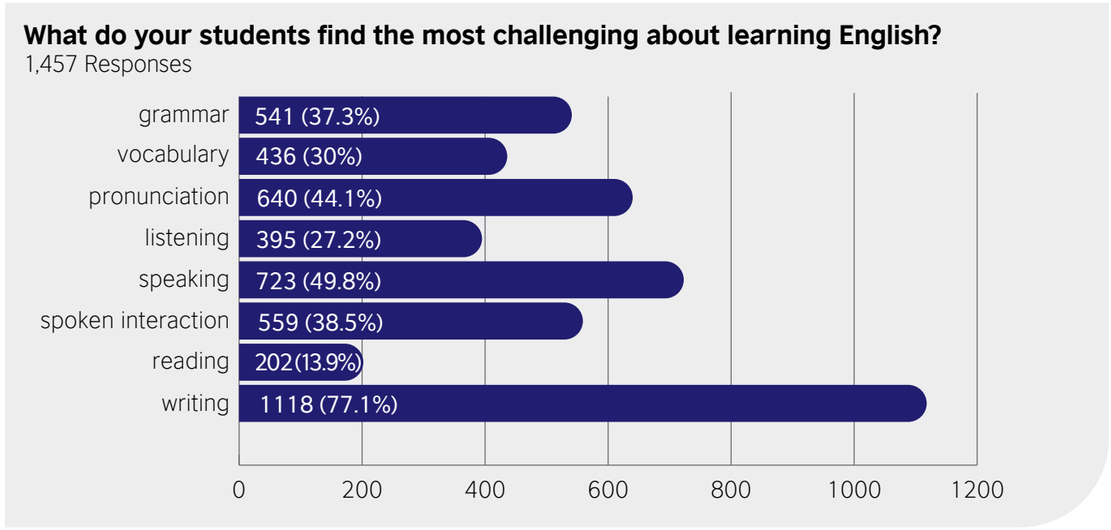
Teachers

There was a strong correlation between the lessons that teachers said they enjoyed teaching the most (grammar, reading, listening) and the strengths in their teaching identified by the inspectors. Perhaps unsurprisingly, these responses also correlate with the language systems and skills identified as their students' greatest strengths:

What are your students greatest strengths in English?
1,457 Responses



A subsequent question about the aspects of learning English that students find most challenging produced a complementary set of responses:



However, it should be noted that teachers' enthusiasm for grammar is not reflected to the same extent in their perception of what their students find more challenging.

When teachers were asked about the differences between their teaching and the way they had been taught English, a significant number of responses identified a positive difference, e.g. "Today, with the new approach CBA, students play an active role in the learning process. they are not passive receivers…", while some displayed more scepticism, e.g. "I don't find any difference. Here, in Algeria we are not teachers of English as a foreign language, but teachers of writing. Both teachers and learners focus on a set of activities mostly taught and learnt in a mechanical way."

Use of technology varies widely, with some teachers making regular use of video, a minority using ICT and students making use of electronic dictionaries, (e.g. "It goes without saying that I'm a great user of ICT. I do use ICT in almost every lesson (Computer, data projector, videos, songs, smart dictionaries …) I have created an account for my learners to keep always learning together") while others have little or no access to hardware ("No opportunities for that"; "Not available in my school").

The teachers were all convinced that their students will need English in the future. Some responses mentioned study needs at university, though this was a less dominant factor than in the inspectors' questionnaire. The teachers also identified a slightly wider range than the inspectors of occupational needs for English in the future.

2.2.3 Students

In successive school visits for SSRA scoping studies over the past three years, we have met large groups of students who have expressed great enthusiasm for English and have revealed a wealth of informal contact with the language outside the confines of the classroom. They have spoken of their engagement with English through reading for pleasure, watching films in English, listening to songs in English, gaming and chatting online in English to fellow-players all over the world. When asked which English lessons they liked the most, to our surprise they mentioned writing activities, the reason being that these were the only occasions where they had the opportunity to express their personal ideas and opinions. Their energy and enthusiasm for English as a real-world means of communication is in marked contrast to the majority of lessons that we have observed, where students were almost totally constrained by the limits of highly controlled practice and given little or no creative opportunity to develop their language skills. This stark contrast between the small culture of the classroom and students' experience of the language beyond the classroom suggests that there is largely untapped potential for teachers to exploit in terms of the broad cultural support for language learning. This correlates with the view of the co-founder of a translation company, reported below by Itri Insights, that there is a need for "a well-rounded and modern approach that takes into account culture and everything else involved in learning a language".

It should be noted that most of the teachers who participated in a focus group discussion for the current study were strongly in favour of responding to students' needs and preferences by strengthening the connection between the formal teaching of English and students' exposure to the language outside the classroom. Examples mentioned by individual teachers included the use of films, songs and science fiction.

2.2.4 Private sector

In Part Three, Itri Insights report in some detail on the practice of English language teaching in the private sector.

I was able to interview via Skype, three Algerian teachers at the British Council Teaching Centre in Algiers. They mentioned a range of classroom approaches they are encouraged by their academic management to adopt and which are facilitated by the UK textbooks they are using, viz. Task-Based Learning, critical thinking, debate and discussion, and the use of songs.

They are strongly aware of their students' informal engagement with the language outside the classroom and of their language needs, for general academic purposes and subject specialisms at university, and for specific workplace purposes, as well as for travel and socialising. They also mentioned a distinctive orientation to methodology, which encompasses communicative modes of interaction (pairwork, groupwork), learner training (learning how to learn) and building a community of learners.

When comparing their well-resourced teaching context with their own experience as learners in Algerian state schools, they mentioned the lack of school libraries and other resources, which they felt would need to be addressed as part of a possible move to CLIL / EMI.

3

Teacher education

3.1 Teacher training

3.1.1 Contextual overview

There is a significant imbalance between ENS-trained teachers and those who enter the profession from university. In the most recent figures available, in 2015–16 around 5,200 (21 per cent) teachers were recruited from ENS against 19, 300 (79 per cent) from universities. [Sources: Maraf 2016; Coffey 2017]

> "Algeria places particular importance on training teachers to teach at a particular school level. Generally, trainee teachers take distinct qualifications for the level they wish to teach, although some institutions such as the ENS Kouba have assigned the first two years of ITT courses to a common stream for all trainees looking to teach at lower and upper secondary levels. According to the trainee teacher's capacity and preference, they then focus on teaching one level: upper secondary or lower secondary" (UK NARIC 2012).

On graduating from ENS, newly appointed teachers are required to sign a permanent contract which commits them to remaining in the profession for 4–5 years.

Initial teacher training (ITT) is both theoretical and applied, with a compulsory practical component. National guidelines require a half day per week to be spent in schools, but

> "allocation of the remaining hours to pedagogical theory, practice or subject specialisation is determined by the programme provider. This means that at least half of the time devoted to teacher training is assigned to theoretical study but this proportion can be as high as 85 per cent depending on the faculty offering the programme. [...] The focus is on subject specialisation, with the first three years of ITT programmes spent building subject knowledge in the individual's chosen area (such as English or French)" (UK NARIC 2012).

Newly appointed teachers undergo specific training for an initial period of 15 days, and subsequently a half-day of training per month (McKinsey 2007).

The Coffey report, cited above, concluded that the quality of education targeted by the reform can never be achieved unless the quality of teacher training is better aligned to the requirements of the profession. "A few days of awareness of pedagogy that will not enable teachers to become professionals" (Coffey 2017).

3.1.2 Interview with ENS Head of English

A planned meeting with the Head of the English department in a leading ENS was replaced by a telephone interview as a result of the Covid-19 crisis. This conversation confirmed the comments cited above from the Coffey report. Her main concern was the imbalance between language pedagogy and language ability, as well as the lack of alignment between theory and practice. Apart from an initial recruitment interview designed to assess "interpersonal skills, strong communication skills, willingness to learn and motivation to teach" (McKinsey 2007), assessment throughout the ENS programme is conducted almost entirely on the basis of essays and a formal written exam. She also mentioned the lack of attention given to the application and integration of 21st century skills in the teaching of English.

When asked about the degree of freedom that trainee teachers feel they have in adapting or departing from the textbook, she felt that this applied to the replacement of content rather than in terms of methodology, as the design of teaching materials continues to exert a powerful influence on the choices that teachers feel are available.

4

English for employability

In terms of English for employability within the state school system, it seems clear that the provision of content-based language teaching (CLIL) would be a way forward. Such an innovation would imply in-service training interventions and close collaboration between teachers of English and teachers of technical subjects. In the absence of such a move for the foreseeable future, however, there is significant scope for informal collaboration in schools between language teachers and their subject teaching colleagues.

- The member of the MCIT cited the example of the engineer repairing a machine who needs to be able to read the English instruction manual
- Looking ahead to the eventual introduction of EMI at university level, the MEN decision maker emphasised the importance of linking English with other school subjects by tackling STEM-related topics and texts so as to provide greater continuity between school and university
- The ENS Head of English emphasised that the introduction of EMI could not be "an overnight decision", but that such a change would necessarily imply a lengthy training process, as well as a recalibration of the national curriculum to embed the practice of content-based language teaching and the links between English and other subjects throughout the educational system.

In their focus group discussion, the 12 inspectors felt strongly that school principals could be key agents of change in promoting collaboration, including a programme of peer observation, between teachers of English and teachers of other subjects. Ever mindful of the demands of the final exam, they envisaged a shift away from generic textbook content and transmission teaching of the language to theme-based teaching to better accommodate content and language that would act as a bridge to an eventual EMI approach at university.

The inspectors' viewpoint was endorsed in the subsequent focus group discussion with the 15 teachers, some of whom identified a stronger focus on STEM content in a previous iteration of the curriculum.

The vocational dimension of language education is explored fully by Itri Insights in Part Three.

5

Recommendations

Propose to MEN that they cooperate in a textbook reform project

Textbooks at both middle and secondary levels exert a powerful influence on teachers, even many of those who understand the intentions of the competency-based approach (CBA), and are key determinants of classroom practices. If teaching and learning are to be better aligned with the pedagogic principles foregrounded in the curriculum, and if they are to better serve the aim of enhancing employability, it is essential that the textbooks are rendered fit for purpose. Such a project would need to combine external expertise with local awareness and experience.

Propose to MEN that they cooperate in an assessment review

Teachers' strict adherence to the textbook and their reluctance to depart from it are driven to a large extent by a combination of time pressure and the washback effect of the final exam. A properly validated review and revision of the exam conducted in liaison with a textbook reform project would help to grant authority to new textbooks, ensure greater alignment of teaching with curriculum objectives, and promote a coherent approach to English in the curriculum, re-focused to act as a key driver subsequent language study, whether in higher education or in vocational training.

Provide a training programme focusing specifically on the use of mobile devices in learning in ELT

According to a current call for proposals from the Strategic Impact Development Fund (SIEF), there are "plans to move to tablet teaching across thousands of schools in the coming years, given large class sizes, outdated textbooks and the sheer size of Algeria" (SIEF 2020). Since the provision of computers for language teaching and learning is constrained by cost and uneven or erratic internet access, as well as the competing claims of Science and Technology teachers, the most practical way to integrate digital resources in the teaching and learning of English in the immediate future is not to focus on computers, or even tablets, but to exploit mobile phone technology. Mobile phone ownership is so pervasive that even with 3G or 4G connectivity in locations or at times when WiFi access is unavailable, there is scope for teachers to realise the potential of mobile learning. This would appear to be a solution for remote / rural areas, and the Rwandan experience with blended mentor training suggests that such an approach could be feasible, both pedagogically and financially. The MEN decision maker was positive about the possibility but pointed out that it would need to be the subject of a joint plan with the directorate of training.

6

Challenges and areas for further investigation

Introduction of English at primary level

There is a strong belief, informed by Lenneberg's (1967) 'Critical Period Hypothesis' (CPH), that the younger that children start learning a foreign language, the more successful they will be. Young children can be highly receptive to foreign language input, especially if it is mediated through games, songs, stories and physical activities, but they are not very efficient learners, and the CPH, which is based on neural development and first language acquisition, has been widely questioned. What does seem clear, however, is that young learners benefit principally in two ways: unselfconsciously developing good pronunciation habits and developing curiosity and positive affect towards the language (Myles 2017).

Content and Language Integrated learning (CLIL) / English as a Medium of Instruction (EMI)

The notion of teaching STEM subjects at school through the medium of English (CLIL) remains an unrealised ministerial intention and is inextricably linked to the proposed introduction of EMI in higher education. It is difficult to determine if or when either of these developments may be implemented, but a profitable interim measure could be the promotion of institutionalised collaboration between English language teachers and teachers of other curriculum subjects. At present, this is something that happens in some schools, but is not a widespread practice. The MEN decision maker insisted that there are no institutional obstacles standing in the way of such collaboration and agreed that it could be promoted more systematically. A detailed investigation of how, administratively, this kind of liaison could be accomplished both at secondary and tertiary levels of the education system might help to prepare the ground for eventual moves towards CLIL / EMI approaches.

Learner perspectives

A notable dimension missing from this report is the perspective of learners, at school level, as well as at university and in TVET contexts. The situation at the time of writing has forced us to rely on evidence from secondary research and our own past experience to represent learner attitudes and felt needs. Once circumstances allow, it will be important to conduct some further investigation amongst learners at all levels, so as to ensure that their 'wants, needs and lacks' (Hutchinson & Waters 1987/1996; Songhori 2008) are taken into account in formulating any future initiatives. Any such investigation should take into account the disconnect between 'English' as a school subject and English as experienced and used by students beyond the classroom. This would involve exploring the scope for schools to complement conventional teaching with motivating extra-curricular activities such as reading groups and competitions based on curriculum subject content, activities that according to the member of the MCIT are already organised in a minority of schools but could be encouraged more widely.

Continuing professional development (CPD)

Teachers need the assurance to become more independent and more creative in the ways that they implement the curriculum. This suggests a profound need for an incisive CPD initiative to address their underlying beliefs and attitudes to the ways in which the curriculum is followed rather than simply a programme of more agglutinative training. A properly focused approach to a CPD programme targeted in this way would need to be informed by further investigation with a core group of experienced inspectors.

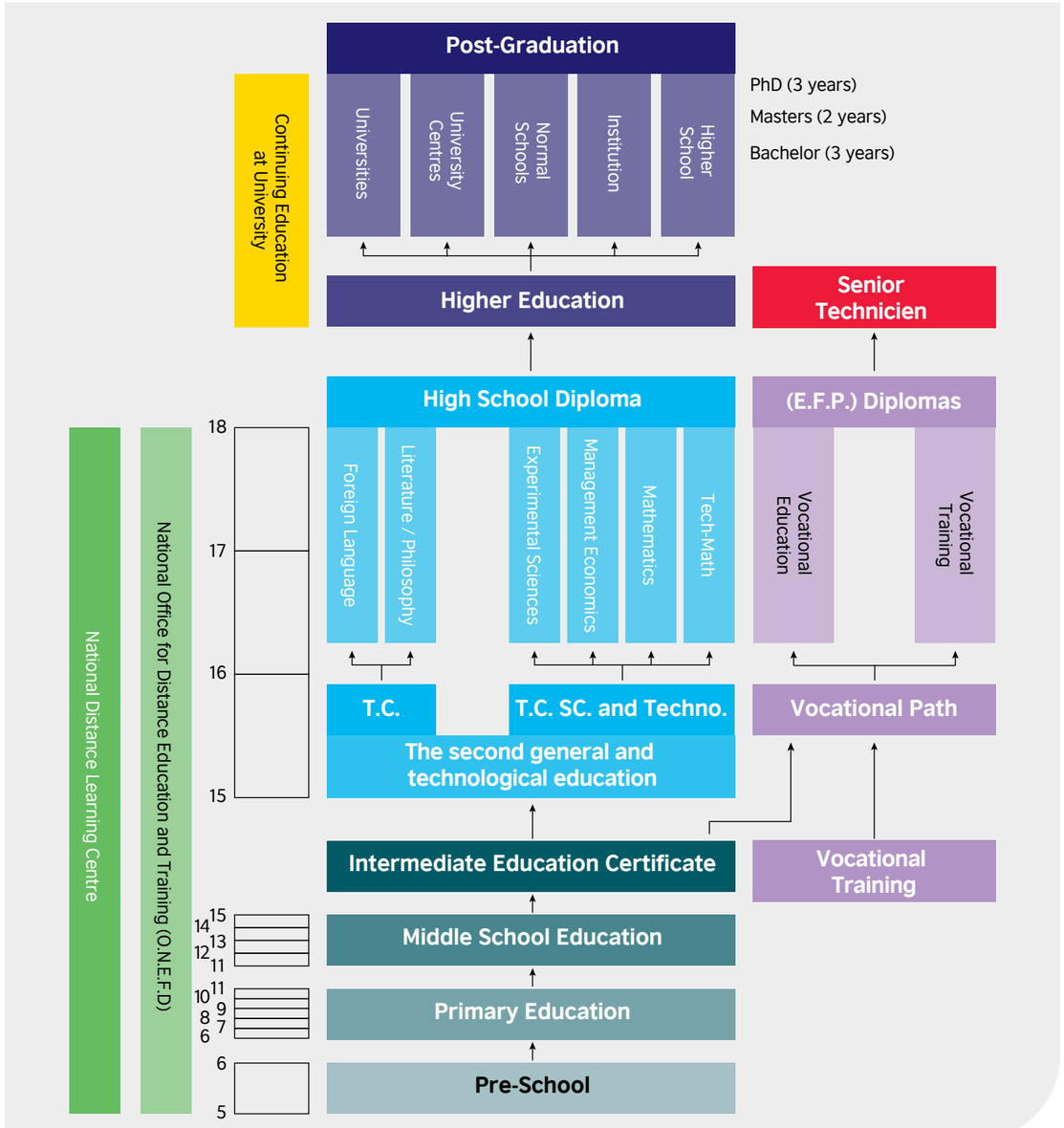
Transition and continuity

A significant issue in all education systems is the points of transition from one level of the system to the next. This is particularly significant in the current context in relation to the transition between secondary school and university or vocational training. It is imperative when considering English for employability in Algeria for students graduating from secondary schools to be appropriately prepared. This is most evident in the transition from secondary education, but, as mentioned by the inspectors and school leaders we interviewed, also requires attention at the transition points from primary to middle, and from middle to secondary. The issue of CLIL/EMI notwithstanding, the question of transition through the system is one that demands detailed investigation.

7

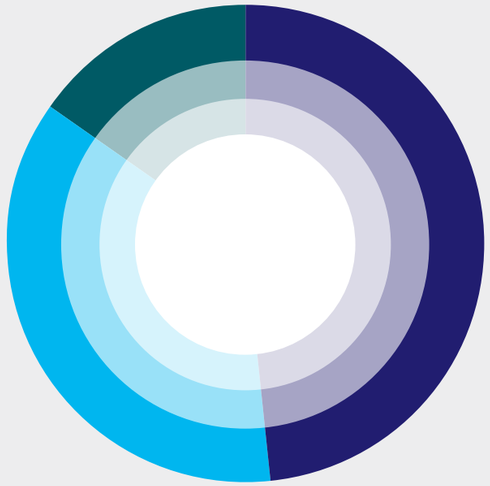
Appendices

7.1 Structure of the education system and student numbers



Source: http://www.education.gov.dz/fr/systeme-educatif-algerien/

Number of pupils by school level
(in 1000's)



Primary **4,283**

Lower Secondary **3,240**

Upper Secondary **1,333**

Source: Unesco Institute for statistics 2017

7.2 Survey questionnaires

7.2.1 Questionnaire for inspectors

Improving English teaching and learning in Algeria. This survey is part of a British Council research study about English for employability in Algeria

1. Please state your age.
2. Which other language(s) do you speak?
3. How long have you been an English inspector?
4. What type of school are you responsible for?
5. What do you do to keep your English up to date?
6. What opportunities do you and your teachers have for professional development?
7. What are your teachers' greatest strengths in teaching English?
8. What do your teachers find most challenging about teaching English?
9. To what extent do your teachers feel able to adapt or supplement their English textbook?

   Linear scale 1 to 5: caption for 1 – They feel totally free to adapt

   caption for 5 – They have no freedom to adapt
10. In what way(s) do your teachers' classes differ from the way you and they were taught English at school?
11. In what way(s) do your teachers and their students use technologies (video,ICT, online resources) in teaching / learning English?
12. How do you think Algerian students will need to use English in the future?
13. In what kinds of jobs in Algeria will it be important for students to be able to use English?
14. In what ways do you think your teachers' English classes help to provide students with the language skills they will need for the world of work?
15. What additional resources or forms of support would help to make your teachers' English classes more useful for their students' future needs?

7.2.2 Questionnaire for teachers

Improving English teaching and learning English in Algeria

This survey is part of a British Council research study about English for employability in Algeria

1. Please state your age
   Checkboxes: 25–30 / 31–40 / 41–50 / 51–60
2. Which other language(s) do you speak?
3. How long have you been teaching English?
4. What type of school do you teach in?
5. What types of lessons do you most enjoy teaching?
6. What types of lessons do you find most challenging?
7. What do you do to keep your English up to date?
8. What opportunities do you have for professional development?
9. What are your students' greatest strengths in English?
10. What do your students find most challenging about learning English?
11. To what extent do you feel able to adapt or supplement your English textbook?

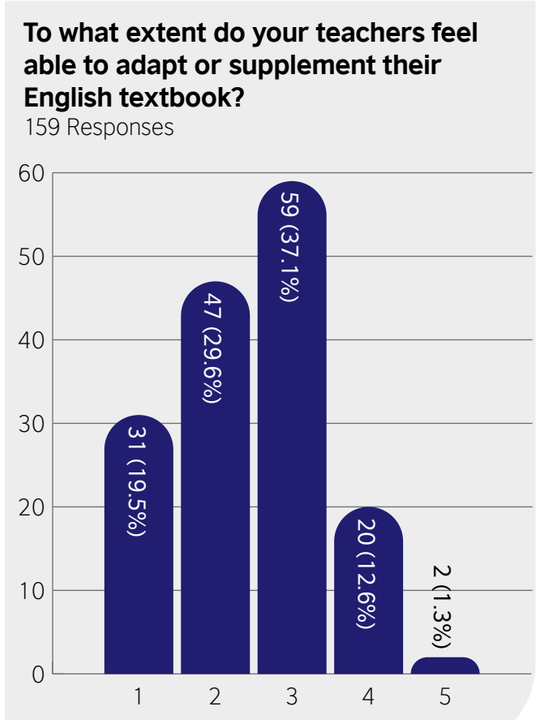
    Linear scale 1 to 5: caption for 1 – I feel totally free to adapt

    caption for 5 – I have no freedom to adapt
12. In what way(s) do your classes differ from the way you were taught English at school?
13. In what way(s) do you and your students use technologies (video, ICT, online resources) in teaching / learning English?
14. How do you think your students will need to use English in the future?
15. In what kinds of jobs in Algeria will it be important for your students to be able to use English?
16. In what ways do you think your English classes help to provide students with the language skills they will need for the world of work?
17. What additional resources or forms of support would help to make your English classes more useful for your students' future needs?

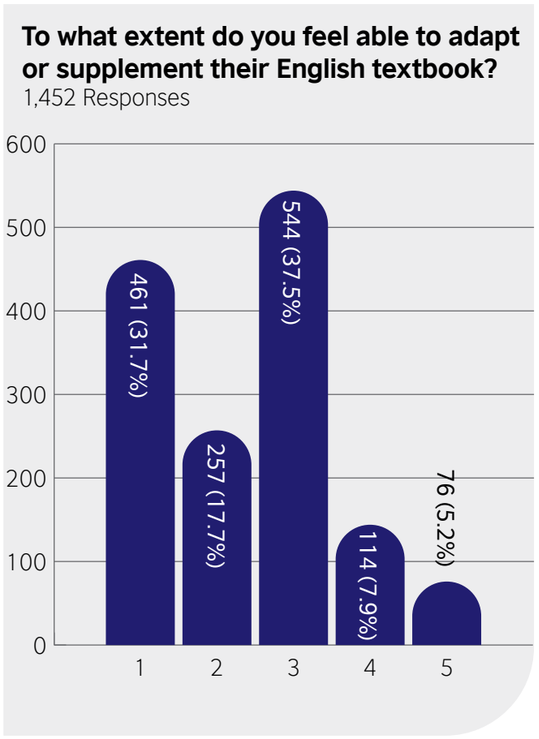
7.3: Survey results

7.3.1 Textbook adaptation

Inspectors



Teachers



7.3.2 Selected responses

Inspectors

In what way(s) do your teachers' classes differ from the way you and they were taught English at school?

My teachers work with less crowded classes. Their learners are much more exposed to English than ours. Unlike in their classes, the main focus was on mastery of grammar notions in my class.

Today's classes have a great amount of resources and materials which was not the case in the past.

Today, classes are somewhat more communicative, learner-centred, based on active teaching/learning strategies, competency-based.

The approaches to teaching English are developing and changing. Teachers try their best to implement the State's choices despite the fact they they usually lack sufficent training.

We used to enjoy learning English as a language; nowadays, the pupils study it as a subject in which they will take tests and therefore get marks. Many teachers still teach the way they were taught; adopting a teacher- centred approach, they focus more on grammatical competence rather than communicative competence. On the other hand, in nowaydays classes, the learners are exposed to a richer language, with a variety of topics related to the pupils' interests. They are more motivated thanks to the use of games, videos and songs.

Great difference! In the past, the most important was to communicate, The most we could expect a middle school pupil used to be writing a brief and concise production. We still learn by heart the first dialogue we had learnt more than 30 years ago (a whole generation does). Learning was based on simple English and pupils were expected to express themselves in English (a language they`re fond of) using a simple sentence learning a new word or phrase each day. Now the programs are full: a lot of (LGP) grammar, lexis and pronunciation points to be taught in the same sequence within two or three hours a week.

They don't differ very much. The majority of teachers we observed still follow an approach to teaching characterised by teacher dominant role and too much TTT [Teacher Talking Time].

In what way(s) do your teachers and their students use technologies (video, ICT, online resources) in teaching / learning English?

Most of them are "old" teachers and looking for the retirement day, so they are opponent to any novelties in teaching field as they find difficulty in being easy going with change.

Some younger teachers tend to use technologies, I do encourage them inviting them to use technology to facilitate their tasks, but it is not available all time besides, older teachers do not master the use of technology and are not ready to learn.

In what ways do you think your teachers' English classes help to provide students with the language skills they will need for the world of work?

Most of our teaching today is exam-oriented with no or very little consideration of learners needs and objectives. I think a lot must be done to equip our students with the kind of English they will need in the real world, especially in their future professional lives.

Teachers

In what way(s) do your classes differ from the way you were taught English at school?

Personally speaking, I can say that the main difference is the fact that my learners today do not focus much more on speaking the language but only on keeping rules.

Now, students have more opportunities; project based learning, ICT, Internet but they miss the will to learn. When I was a student, we had the will but not the facilities students have now.

In what ways do you think your English classes help to provide students with the language skills they will need for the world of work?

I believe that my English classes help, to some extent, providing my students with language skills needed for the world of work. Not only do I teach them what is in the textbook, but more than that, I always try to emphasize the importance of communication and I even dedicate some classes for teaching vocabulary which does not necessarily have to be related to the theme of the unit they are studying. I never allow the use of Arabic in class and every now and then I choose a random topic for my learners, and I give them the chance to communicate and practice the language. Hence, I'm totally against, merely, teaching the pupils the basics they need just to answer there tests and exams and get good marks.

I think my classes lack this kind of purposes , especially with 1st year students, because their school program is so long , so I'm most focused on doing the scheduled lessons. Unliked the 2nd year students, I always have the chance with them to discuss more topic either in spoken or written. I try to find interesting Topic related to the units in order to let them express themselves.

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Part Three
Assessing the effectiveness of current English language provision in the development of the level of English language proficiency required for employment

Amy Turner & Idriss Hadj Nacer, Itri Insights

1

Introduction

1.1 The economic and demographic context

Oil and gas have long been the backbone of the Algerian economy, making up around 97 per cent of export revenues and historically accounted for as much as 45 per cent of GDP. With oil prices hovering comfortably around 100 USD/barrel for much of the early 2000s, Algeria had little difficulty making this economic model work. Indeed, the country consistently ran a trade and budget surplus and engaged in a number of large-scale infrastructure projects, which injected some of its oil and gas revenues back into the economy. Algeria also has an established tradition of providing subsidised energy and consumer essentials such as wheat, milk and sugar. The country offers free healthcare, free university education and has a programme of subsidised housing aimed at moving its poorest citizens out of precarious living situations.

While their true effectiveness has been called into question, these measures were nonetheless sufficient to foster growth and maintain social stability, particularly as Algeria was emerging from a ten-year civil conflict. This stability was interrupted, however, by the plunging oil prices of late 2014. Driven down by slowing global growth and excess supply, prices took a steep dive and set off on a longer-term downward trajectory that would reach its dénouement in early 2016. The depressed prices lasted well into mid-2017 and then stabilised before falling again in early 2020 over fears of a global recession caused by the Covid-19 pandemic and the prospect of a price war between Saudi Arabia and Russia.

Were it not already evident, the six years following the 2014 price collapse have been more than enough to expose the vulnerability of the Algerian economy. As oil revenues began to drop off and remained low, existing construction and infrastructure projects were scaled back or frozen, restrictions were introduced to slash the country's imports, and much has been said about the need to diversify Algeria's economy and work towards creating a strong domestic production base.

However, six years after the initial economic shock and with oil prices falling again, the structure of the Algerian economy remains substantially unchanged. As such, the state sector continues to provide much of the impetus for the economy as a whole. Private enterprise remains limited, as does Foreign Direct Investment (FDI).

Nonetheless, the Algerian economy remains likely to undergo substantial change, and in the near future. The country's declining oil production figures are not a temporary blip, but rather, evidence of a structural depletion of the country's mature deposits that is likely to continue on its current trajectory. As a result, even excluding the impact of global oil price fluctuations, there are significant risks weighing on Algeria's future oil revenues. As such, the make-up of the country's economy will necessarily have to evolve, even if the exact pace of any changes remains unclear.

The second underlying consideration that will shape Algeria's future is demographic. Today, just under 55 per cent of Algeria's population of 43 million people consists of young people under the age of 30. Almost a third of the total population is under the age of 15 and, in 2018, live births exceeded one million for the fourth year in a row. Besides their number, these new generations of Algerians are increasingly urban, educated and connected to the world at large, having grown up with the Internet at their fingertips[2].

A larger population may mean a larger consumer market and a greater number of workers, but it also requires the economy to grow in such way as to allow

2 While only 62.47 per cent of Algerian households had a fixed line phone connection by Q3 2019, the country has a mobile phone penetration rate of 103% meaning there are 103 mobile phone SIM cards for every 100 people. There are 36.55 million 3G and 4G subscribers for a population of 43 million people.

for these individuals to be fed, educated and housed as well to have their medical needs treated.

Crucially, in order for the economy to grow, it must also create jobs for young Algerians. This job creation may occur directly via the expansion of the state budget, as has traditionally been the case, or by encouraging the emergence of a larger number of private sector employers. Algeria has missed the boat on this demographic challenge before, back in the 1970s when the newly independent nation was finding its feet. But it is not the country now that it was 40 years ago, as improvements to education, growing urbanisation and the increased presence of women in the workplace play in its favour.

The combined impact of these two key factors has already begun to make itself felt. As pressures on the economy have increased and settled in for the long haul, they have already translated into social and political pressures. In the hands of the new generation of Algerians, more numerous now than at any time in history, these factors have fuelled the climate for change.

If these pressures ultimately do translate into an increased appetite for foreign investment and a stronger private sector, they may well bring with them more competitive approaches to conducting business, potentially leading to increased professional standardisation, including with regard to the use of English for vocational purposes. However, as we discuss in greater detail in the sections below, it appears that this switch has not yet taken place.

1.2 The vocational training context

1.2.1 The Ministry for Professional Training and Teaching

The Ministry for Professional Training and Teaching is responsible for providing training, development and retraining for new and existing employees through continuous training, developing skilled labour, training employees in new techniques, ensuring equal access to professional qualifications and helping disadvantaged groups enter the workforce.

Via its various departments, the Ministry offers three kinds of training, namely; in-person training, apprenticeships and distance learning.

For the 2019 term, a total of 382,000 training places and 305,944 apprenticeship places were offered. There are approximately 1,200 training centres across the country and course options cover a wide range of topics in agriculture, tourism, administrative roles, beauty training, childcare etc.

1.2.2 Vocational training tax

Since 1998, it has been a legal requirement for all employers in Algeria to spend an amount equivalent to one per cent of their company's annual payroll on professional training for their staff. If they fail to do so, they must pay a vocational training tax which is equivalent to one per cent of annual payroll minus the percentage actually spent on training.

The extent to which this legislation is enforced is unclear. However, both employers and employees are generally aware of this requirement and, anecdotally speaking, many employers appear to pay for vocational training rather than pay the vocational training tax.

A multitude of vocational training companies and independent consultants exist to service this market, although it has not been possible to arrive at a definitive number of service providers given the timeframe of this study.

Language learning costs count towards an employer's professional training expenses.

1.2.3 Perspectives on vocational training

A running theme throughout our discussions with both the business community and administrative stakeholders in Algeria was the idea that the legal requirement to provide vocational training has not necessarily led to the practice of genuinely useful continuing professional development activities. Indeed, the opposite may actually be the case.

In our discussions with representatives of the National Centre for Professional Distance Education (CNEPD), it was suggested that HR Managers within companies may not always conduct detailed research to identify training needs and match these with service providers that would add value to their staff and/or company but rather "tend to sign up their staff for the trainings they see at the top of their inbox". The CNEPD itself operates as a wing of the Ministry for Professional Training and Teaching (MFEP).

Our interviews with at least two business leaders in Algeria raised the idea that the current provision of vocational training in general – and language training in particular – results in "token learning rather than genuine learning" and are geared towards using up an existing budget or providing certificates that "are not really worth the paper they're written on".

See the section on the current vocational English teaching provision for more details of employers' perceptions of English language needs.

2

The current use of English in Algerian business

2.1 English for doing business in Algeria

2.1.1 Perspectives on English for doing business in Algeria

Received wisdom suggests that French is the language of business in Algeria. To test this theory, we interviewed a representative of the Forum (previously known as the Algerian Business Leaders' Forum or FCE). Under new leadership, the re-branded 'Forum' is actively seeking to diversify its partners, with a much greater focus on the English-speaking business community.

The representative confirmed that the FCE was formerly very focussed on doing business with France and usually only communicated in French. In his words, "today, a British or American ambassador can bring a businessman who only speaks English to meet with the Forum and they'll be able to communicate. They may not be able to speak perfectly but they will be able to make themselves understood. That wasn't the case before."

The representative also underlined the distinction between the incoming generations of business leaders, currently working their way up through family businesses, and those who originally founded the large Algerian private companies that formed the core of the FCE's membership. It is the representative's belief that the "new generation" of business leaders who have "generally done the equivalent of a master's degree (Bac+5) are completely comfortable with English" in contrast to former generations who had often only completed basic education.

He also separated the new generation of business leaders into two broad categories. On the one hand, he believes that there are business leaders who "studied in France and have come back to Algeria" but tend to remain focussed on France and doing business with France. On the other, there are business leaders who "stayed in Algeria and mixed with people of all nationalities" and therefore understood the importance of learning English for carrying out business internationally.

The idea that the younger members of Algeria's business community speak more – and better – English was corroborated by a member of the Women's Entrepreneur Club. It should be noted that the Women's Entrepreneur Club, the only major body for women business leaders in Algeria, was created and continues to function under the umbrella of the Algerian-French Chamber of Commerce (CCIAF).

Overall, throughout our interviews, business leaders backed up the idea that English is "necessary" for doing business and expressed the view that Algeria will inevitably conduct more of its business activities in English at an unspecified point in the future.

2.1.2 Publications in English for doing business in Algeria

There are very few publications in English relating to doing business in Algeria, which may in itself be taken as evidence that English is not broadly used within the business community nor oriented to English speakers.

The UK-based company Oxford Business Group used to produce a yearly marketing report on Algeria. However, the content of the report was written and edited by teams outside of Algeria. In addition, the most recent version of the report is the 2018 edition. The company has not produced any content on Algeria since early 2019, which suggests it may no longer be active in the country.

Another major business publication on Algeria in English is KPMG's annual 'Guide to Investing in Algeria'. The document is printed and distributed primarily as marketing material in both French and English.

From the interviews we carried out with non-Algerian businesspeople in Algeria comments suggested that communicating in English sometimes had less to do with communicating efficiently in an 'international lingua franca' and more to do with signalling prestige. In her interview, a company head who set up the offices of a translation agency in Algeria, suggested that she "struggles to convince" companies in Algeria – whether local or international – that they require what she described as "native-level English". The implication would appear to be that the actual quality of the language produced is less important than being seen to produce it. She also indicated that companies are used to "making do" with what is available to them and may not now see the need to raise English-language standards.

2.2 Use of English for internal company communication

2.2.1 Relevant literature on the use of English for internal company communication

There is little available literature on the use of English for internal company communication in Algeria.

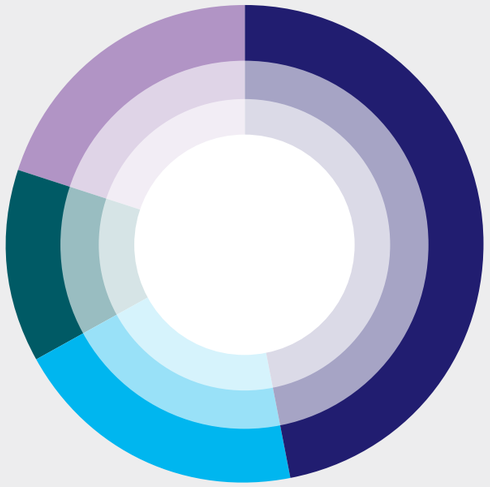
The available literature we identified centres on the linguistic characteristics and technical accuracy of the language used as opposed to the ways in which the language is used for practical purposes in the Algerian business context. As such, Soumia Makouf's Master's thesis entitled *English as a common corporate language on a multinational company: A case study of Maersk Line Oran*, examines conversational features, syntax and punctuation in 50 company emails. The final chapter of this study also covers the issue of demand and current vocational language provision. Notably, Makouf reports that "language training in specialised vocabulary and technical terms" was considered to be the most useful kind of language training provided, which aligns with the results of our own primary research. The researcher also proposes a syllabus outline for Business English teaching based on the results of her research.

2.2.2 Perspectives on the use of English for internal company communication

To assess the use of English for internal company communication, we conducted a general survey alongside in-depth interviews with a sample of both international and Algerian companies doing business in Algeria.

Our survey produced the following results with regard to the use of English for internal company communication.

Which staff, including local staff and expats, currently use either written or spoken English in the workplace?



- Everybody, **47%**
- Mostly senior management, **20%**
- Mostly staff in technical roles, **13%**
- Other, **20%**

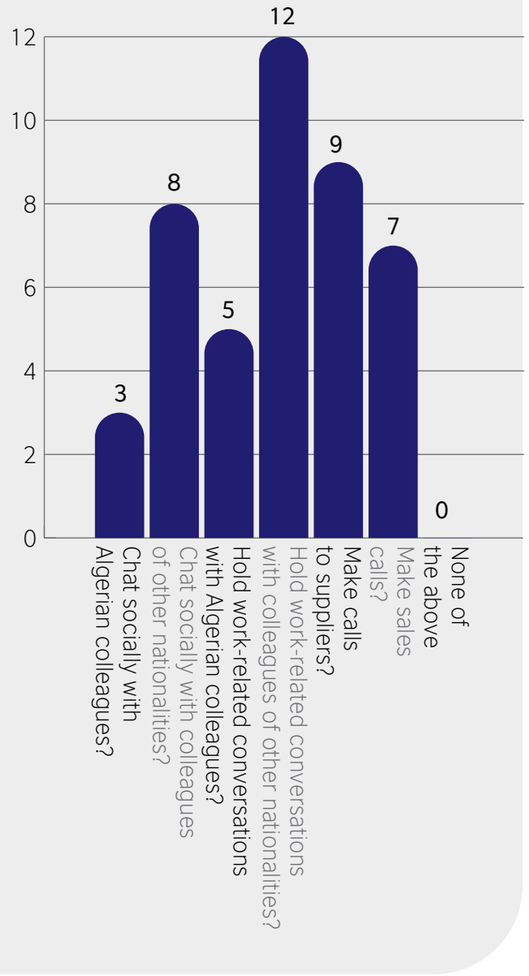
Source: Itri Insights

How frequently do local staff generally use written or spoken English in the workplace?

- Always, **27%**
- Rarely, **0%**
- Sometimes, **27%**
- Often, **46%**

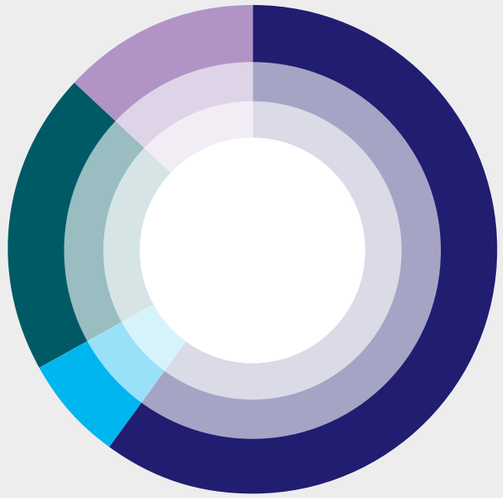
Source: Itri Insights

Do local staff use spoken English to...
(respondents may choose multiple answers)



Source: Itri Insights

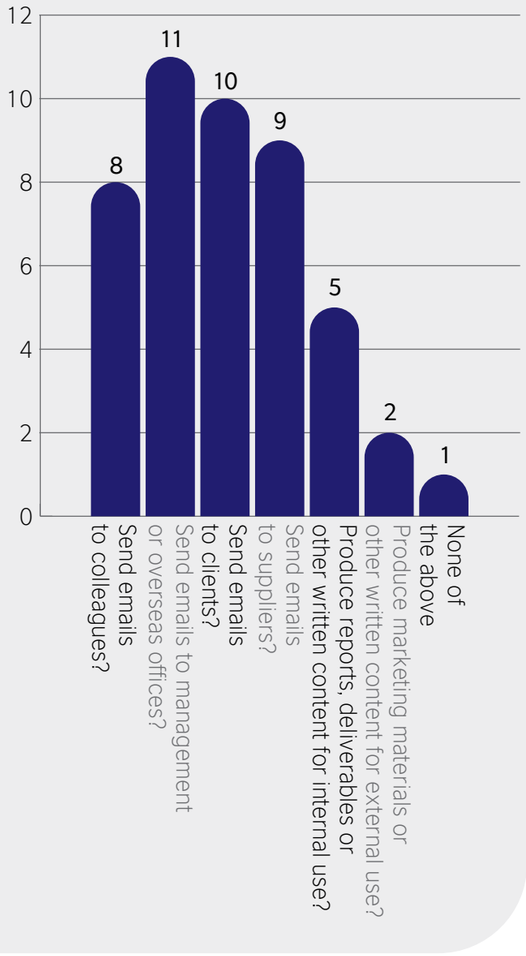
With regard to spoken English, is your local staff's level of language skill appropriate for your company's needs?



- It's generally appropriate for our needs, **60%**
- Generally it slightly exceeds our needs, **7%**
- Generally it falls well below our needs, **20%**
- Generally it falls slightly below our needs, **13%**

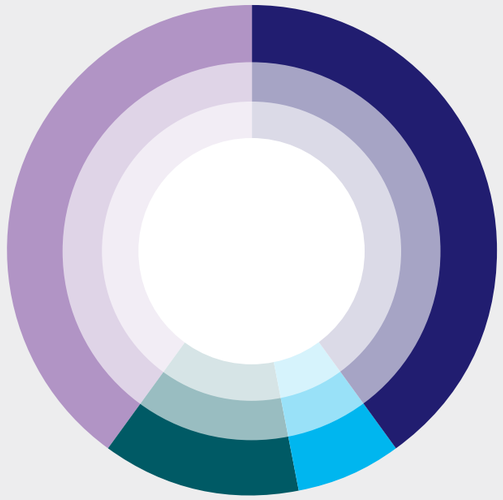
Source: Itri Insights

Do local staff use written English to...
(respondents may choose multiple answers)



Source: Itri Insights

With regard to written English, is your local staff's level of language skill appropriate for your company's needs?



- It's generally appropriate for our needs, **40%**
- Generally it slightly exceeds our needs, **7%**
- Generally it falls well below our needs, **13%**
- Generally it falls slightly below our needs, **40%**

Source: Itri Insights

It should be noted that the survey was deliberately designed to gather information on how English is used in the workplace in Algeria rather than the extent to which companies in Algeria use English. This is primarily because carrying out a reliable survey on the extent to which English is used would require a much larger sample size and would require the survey to be carried out in both French and Arabic, which was not possible within the timeframe of this report. As such, the survey was intentionally sent to companies who it was felt were likely to use English in the workplace. See the survey results section in the appendix for additional details on the methodology and survey respondents.

It is interesting to note that where English is used in the workplace, in almost half of cases (47 per cent) it is used by all employees within the company rather than just those in specific roles. This would tend to suggest that there is some evidence of the existence of an English-speaking business environment within some companies in Algeria. All of the 7 respondents who stated that everybody in the company uses either written or spoken English represented companies that were partly or entirely foreign-owned. However, only two of the respondents represented multinational companies, while the rest were small or micro-enterprises. There did not appear to be any correlation between the different kinds of industries and the frequency with which employees used English, nor the types of roles that were required to use English in the workplace.

The most common use of spoken English in the workplace was to hold work-related conversations with colleagues of other nationalities, followed by making calls to suppliers. The third most selected reason for using English in the workplace was actually for non-work related interactions, namely for conversing with colleagues of other nationalities. This was more often cited as a reason than making sales calls, which may be a reflection of the fact that only a very small number of Algerian companies sell into overseas markets.

With regard to language proficiency, 60 per cent of respondents felt that their employees speak a level of English that is generally appropriate for their needs. One respondent even felt that the level of spoken English at their company was slightly higher than required by the company. A third of respondents felt that the level of English spoken by company employees falls either slightly or well below the company's needs.

This contrasts with the results of the same question applied to written English, for which only 40 per cent of respondents felt that the proficiency level was appropriate for their needs. Again, however, one respondent felt that written English levels were slightly higher than needed. It is worth noting that both companies who stated that the level of written English fell well below their needs operate in the services industry and four of the five companies who stated that the level of written English fell slightly below their needs also operate in the services sector. The fifth was an oil and gas or energy company.

The most commonly cited reason for using written English in the workplace was to send emails to management or to company offices overseas. However, 80 per cent of the companies surveyed were partly or entirely foreign-owned. For the three wholly Algerian companies in the sample, all three use written English to produce reports, deliverables or other written content while two of the three also use written English to send emails to suppliers.

Of the six company representatives with whom we spoke in detail, all six had team members who use English to a greater or lesser extent on a regular basis.

With regard to companies headquartered in English-speaking countries and non-English speaking countries, English was frequently used for communicating about work-related issues via email and by phone or for face-to-face conversation. In some instances, staff also used English to chat socially about non-work related topics with non-Algerian colleagues, if the colleague in question

spoke no French. In one example, a non-French speaker who is the Country Head of a multinational pharmaceuticals company suggested that communication in English was quite laborious and was "less efficient" than it would be elsewhere in the world. There were no reported instances of Algerian staff using English to chat socially about non-work related topics amongst themselves in the detailed interviews; however, this was reported via the survey.

More than one interviewee expressed the idea that English was not used for anyone in a role that required contact with the Algerian administration, with the general Algerian public or for making sales within Algeria to Algerian customers. On the other hand, it was used for sales within Algeria to multinational companies.

Business leaders commonly cited "technical roles" as requiring frequent use of English, alongside management roles and anyone required to deal with overseas suppliers or clients. Two business leaders – the Algerian CEO of a technology company and the non-Algerian Country Head of a multinational pharmaceuticals company – indicated that staff used written and spoken English to communicate with customers or suppliers in Dubai and other parts of the world where Arabic is an official language.

At least three business leaders indicated that the current use of English for internal communication does not reflect what the current state of affairs should be within the business because the extent to which the staff could carry out the full range of their duties was limited by their lack of English language skills.

2.3 Use of English for external company communication

2.3.1 The private sector

To assess the use of English for external communication, we carried out a review of the websites of the top 30 private Algerian companies i.e. companies that are wholly Algerian and do not include any foreign capital.

Company	Industry	Head-quarters	Revenues 2017 (USD millions)	Website	Language	Sample English text
Cevital	Agrifood, Automotive, Construction	Bejaia	1,458	cevital.com	French, English, Arabic	As the first private Algerian company to have invested in a wide variety of business sectors, it has passed significant historical milestones to achieve the size and recognition it enjoys today.
Tahkout Manufacturing Company	Automotive	Tiaret	547	tmc-dz.com	French	N/A
Laiterie Soummam	Agrifood	Algiers	487	N/A	N/A	N/A
Biopharm	Pharma-ceuticals	Algiers	480	biopharmdz.com/	French, English	Our production range includes nearly hundred of generic covering the main therapeutic classes.
Sovac	Automotive	Algiers	345	N/A	N/A	N/A
ETRHB Haddad	Construction, Agrifood, Automotive	Constan-tine	339	N/A	N/A	N/A
Saterex	Home electronics	Sétif	221	www.iris.dz	French	N/A
Semoulerie Industrielle de la Mitidja (SIM)	Agrifood	Blida	106	N/A	N/A	N/A
Faderco	Personal care	Algiers	101	faderco.dz	French, English	Since 1986, the group has been involved in the development of the national industry thanks to its state-of-the-art equipment and constant innovations.
La CIAR	Finance	Algiers	88	laciar.com	French	N/A

Pharmalliance	Pharmaceu-ticals	Algiers	61	pharmalliance.dz	French	N/A
Bomare Company	Home electronics	Algiers	61	Bomare company. com	French, English, Arabic	Established in 2001 by its founder and current General Manager, Mr. Ali Boumediene, with a shares capital of 1.023.000.000 DZD.
Laboratoires Merinal	Pharma-ceuticals	Algiers	59	merinal. com	French	N/A
Groupe Benamor	Agrifood	Guelma	58	amorbenamor-group. com	French	N/A
Laboratoires Venus	Personal care	Blida	34	laboratoiresvenus. com/	French	N/A
Icosnet	Telecoms	Algiers	22	icosnet. com	French	N/A
RedMed Group	Logistics	Ouargla	22	redmed-group.com	French, English	Logistics and civil engineering are inseparable activities for the control of oil and gas sites. Our core business is based on logistics.
Smart Link Communications (SLC)	Telecoms	Algiers	20	smartlink-dz.com	French	N/A
Alliance Assurances	Finance	Algiers	17	allianceassurances. com.dz	French, Arabic	N/A
Allégorie Group	Advertising	Algiers	9	allegorie. group	French	N/A
Metidji Holding	Agrifood	Mosta-ganem	6	metidji.com	French	N/A
Groupe Hasnaoui	Construction	Sidi Bel Abbes	3	groupe-hasnaoui. com	French, English, Arabic	The group of companies Hasnaoui is a label that we should preserve strongly, because it has a sample value today, as it has always known how to promote projects of quality.
KouGC	Construction, Agrifood	Algiers	2	kougc.com	French	N/A
Promo Invest	Real Estate	Mascara	1	promo-invest.dz	N/A	N/A
Global Group	Automotive	Oran	1	Yes	French	
Fruital	Soft drinks	Boumer-des	1	No	N/A	N/A
Arcofina Holding	Real Estate	Algiers	N/A	N/A	N/A	N/A
N'Gaous Conserves	Soft drinks	Algiers	N/A	ngaous. com	French, Arabic	N/A
Groupe Benhamadi	Agrifood, Construction	Bordj Bou Arreridj	N/A	extra.dz	French, English	Short pasta Extra are available in more than 14 varieties and ensure a certain freedom of recipes and a multitude of ways of cooking.
Groupe Mehri	Real Estate	Algiers	N/A	Yes	French, English	Active in Algeria since 1962 in the fields of trade, real estate, tourism, hospitality, agriculture and industry, he extends its scope to international business in 1965.

Source: Itri Insights, CNRC, Company websites

Of the 30 companies reviewed, a total of six (20 per cent) had no website and one company, Promo Invest, had a website that consisted of a static landing page featuring only an email address and no additional text. This left a total of 23 websites for which the language could be analysed.

Of the remaining websites, all 23 provided text at least in French and of those 13 (56.5 per cent) provided text exclusively in French. No websites provided text exclusively in English, Arabic or Tamazight. After French, however, English was the most prevalent language. A total of five websites (21.7 per cent) provided English as an option alongside French only, while three websites (13.0 per cent) provided English as an option alongside both French and Arabic. In this sample, Arabic and French was the least prevalent combination of languages, with just two websites (8.7 per cent) offering this combination.

It was not possible to draw firm conclusions about the possible influence of industry, region, revenues or intended audience (business to business or general public) on the choice of language used for public communication.

When examining the sample English text gathered from websites, only the first example could be said to be written in grammatically correct and idiomatic English. The website belongs to the diversified group Cevital, which is notably one of the few private Algerian companies to have operations overseas and to engage in regular export activities.

2.3.2 The public sector

We then carried out the same exercise for the major Algerian companies we identified in the public sector, with the following results:

Company	Industry	Head-quarters	Revenues 2017 (USD millions)	Website	Language	Sample English text
Sonatrach	Oil & gas	Algiers	45,900	sonatrach.com	French	N/A
Cosider	Construc-tion	Algiers	1,200	cosider-groupe.dz	French	N/A
Air Algérie	Aviation	Algiers	750	airalgerie.dz	French, Arabic, English	Algeria also has important natural assets. A land with impressive contrasts. From the Numides to the Arab through the Phoenicians, Romans, Vandals and Byzantines, Algeria has always attracted desires.
SEAAL	Utilities	Algiers	86	seaal.dz	French	N/A
Algérie Télécom	Telecoms	Algiers	80	algerietelecom.dz	French, Arabic, Tamazight	N/A
Sonelgaz	Utilities	Algiers	37	sonelgaz.dz	French, Arabic, English	Social action is a key vector to affirm the corporate citizen image of Sonelgaz and its companies. The Group is committed to assisting and supporting non-profit associations, events and public actions.
Algérie Poste	Communications	Algiers	N/A	poste.dz	French	N/A

Source: Itri Insights, CNRC, Company websites

In the public sector, we identified only seven key companies, since many state-owned companies are in fact gathered together under the umbrella of these larger groups. However, all seven had websites. All seven websites provided information at least in French while four (57.1 per cent) provided information exclusively in French. Of the remaining companies, two (28.6 per cent) provided information in French, English and Arabic while one, Algérie Télécom, provided information in French, English and Tamazight. Of the total of 37 companies surveyed across the private and public sectors, Algérie Télécom was the only company to provide information in Tamazight.

As was the case for the private sector, it was not possible to draw firm conclusions about the influence of industry, region, revenues or intended audience (business to business or general public) on the choice of language. Indeed, the choice of language sometimes appears to be counterintuitive. For example, the oil and gas company Sonatrach is Algeria's primary outward-facing company, providing, as it does, around 97 per cent of the country's export revenues. It generates these revenues primarily through technical partnerships with international companies within Algeria, including French, Spanish, British, US, Canadian and Indonesian companies amongst others. Nonetheless, its website provides information only in French. However, it could equally be argued that these companies use their websites primarily as a marketing tool oriented towards the general public in Algeria, which could explain the prevalence of French.

The way in which English is used on the websites of the two state-owned companies that provided English as an option could not be said to be idiomatic, event to the extent that comprehension is sometimes impeded.

2.3.3 Conclusions

Our review of company websites suggests that companies in both state and private sectors are more likely to use French to communicate publicly online that any other language. Private companies appear to be more likely to use English than Arabic, in spite of the fact that the latter is an official language and the former is not. All companies appear more likely to use English than Tamazight, despite the fact that it has also been an official language since 2016.

The companies surveyed above all have substantial resources at their disposal. In both the private and public sectors, we selected the largest Algerian companies by revenues. In addition, many of these companies, particularly in the state sector, are seen as prestigious employers according to anecdotal evidence. As such, it does not seem likely that the lack of English or low level of English on the websites of Algerian companies can be attributed to a lack of resources.

It is also worth mentioning that during our interviews, we noted that some Algerian companies confirmed that they used English frequently for communicating with their suppliers but have a public website that appears exclusively in French. As such, it should not be assumed that a company's public language of communication necessarily corresponds to the language or languages used internally.

3

The demand for English in business in Algeria

3.1 Relevant literature on the demand for English in business

The available literature on the demand for English in business is limited and has a heavy focus on small-scale case studies as we have seen for other literature on English in business.

Leyla Drouiche's Master's thesis on *The English needed by the administrative staff at the Port of Bejaia, Algeria* concludes that 73 per cent of port workers believe that it is "very important" to learn English for work but that 85 per cent faced difficulties using English. They also reported that "communicating with English language speakers" was the greatest linguistic challenge they face in the workplace.

3.2 Perspectives on the demand for English in business

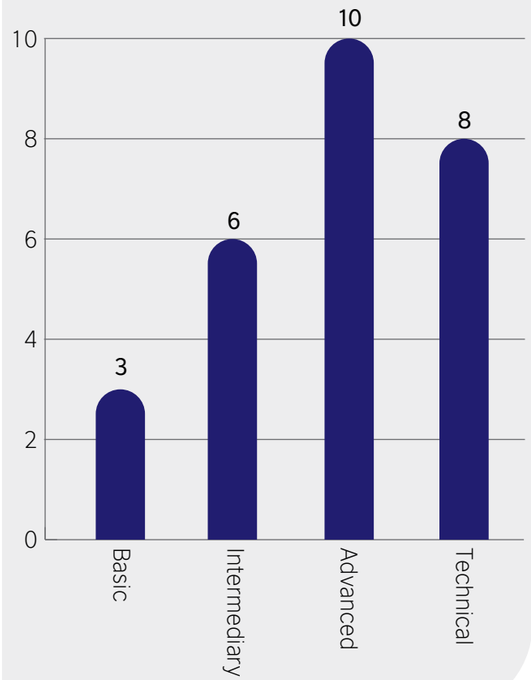
There was a consensus amongst all of those interviewed in depth, including members of the Algerian administration, representatives of business leaders' organisations and company bosses, that there is strong demand for English language skills in the Algerian workplace. According to an official representative of the CNEPD, the "demand for vocational English language teaching is proven".

Of the companies who participated in our online survey, all suggested that they generally sought to hire at least one English speaker per year. A total of ten companies (66 per cent) suggested that they advertise between one and five job vacancies in Algeria in a typical year that have written and/or spoken English skills as a mandatory requirement. At the other end of the scale, one company – in the oil and gas or energy sector – indicated that it advertises 50 positions that require English language competencies in a typical year. In second place, a pharmaceuticals company indicated that it advertises 30 positions per year requiring English and a services company indicated that it advertises 20 positions per year requiring English.

In addition, 47 per cent of companies suggested that they would need to hire slightly more English speakers in the next five years than in the last five years while 33 per cent said they would need to hire many more English speakers in the next five years than in the last five years. This appears to suggest that demand for English speakers may be growing within the Algerian job market. The remaining 20 per cent of survey respondents indicated that they expect to hire the same number of English speakers in the next five years as in the last five years, but no companies suggested that they would hire fewer English speakers in future.

3.2.1 Levels of English

What level of English language skills do you generally require?
(respondents may choose multiple answers)



Source: Itri Insights

According to the results of our survey, most companies who hire English-speaking candidates are looking to hire individuals with either an Advanced or Technical level of English proficiency.

Through our detailed interviews, two business leaders expressed the view that they required "native-level" English speakers and that it was "impossible" or "near impossible" to find employees with this level of English on the Algerian job market. Both business leaders represent companies working in the services sectors and there was a slight nuance in what they appeared to mean by "native-level" English. In one case, the company involved was a translation company that requires employees to translate into grammatically precise and idiomatic language that does not require correction. In the other, the business leader requires employees to produce written deliverables in English but felt that having to make small corrections to grammar and style was acceptable.

At least three business leaders expressed the idea that they were required to "compromise" on their employees' level of English language in order to recruit candidates, with two suggesting that they would not have made this concession in other countries. This sentiment was echoed by one of the online survey respondents. To an open-ended question towards the end of the survey, the respondent suggested that for "formal documents there is a challenge to get the same quality as seen elsewhere in our group". He further suggested that there was an understanding that English was generally a third language for many employees in Algeria and that "often it is acceptable as long as the key messages are conveyed".

Two business leaders also stated that the lack of English language skills amongst Algerian job seekers hindered their growth prospects in Algeria. These included the Country Head of an international telecoms company who stated that his company's development plans were constrained in Algeria because he "cannot delegate" some work due to language constraints. The second interviewee, the CEO of a consulting firm, stated that the lack of candidates with the right language skills was "the main obstacle to the growth of the business".

At least three business leaders suggested that it was not possible to find people with the "technical" skills they required who also had the required English language skills. Two of these interviewees – working in the telecoms and IT industries – suggested that they would rather hire experienced or trained technical staff and send them for additional language training. One stated that he prioritises technical skills

and job experience over language skills because technical skills are “not something you can learn overnight”. The third interviewee, who manages a consulting firm, suggested that it would be easier for him to hire a candidate with excellent language skills and train them on technical matters.

The CNEPD also reinforced the idea that businesses require “operational” and “technical” English language skills that are relevant and “specific” to their industry, not just general English.

3.2.2 Industries with high demand for English language skills

Industries that were identified as having a significant demand for candidates with English language skills, either by those working in the industry themselves or through discussions with the CNEPD, include IT, telecommunications, manufacturing, pharmaceuticals, professional services, tourism and agriculture.

In the case of IT, telecommunications and manufacturing, the demand appeared to stem from the need for professionals to continually update their professional knowledge and the understanding that much of this knowledge is available via the internet and only in English. The frequency of dealings with international clients and suppliers was also a factor for these companies.

In the pharmaceuticals industry, the demand appeared to stem from the presence of a large number of international actors in this sector and their use of English as a working language within the companies.

With regard to professional services, English was in demand either to enable companies “to compete on an international level” or because the language itself is the actual value-added product, as is the case for translation companies.

In tourism, the demand was linked not only to a desire to attract additional clients to Algeria but also the need to work with international suppliers.

With regard to agriculture, which was suggested as an area of high demand by the CNEPD, it was unclear exactly what was seen as driving this demand. It is possible that this is a reflection of the current government drive to encourage food security and direct international investment towards agricultural projects with local producers.

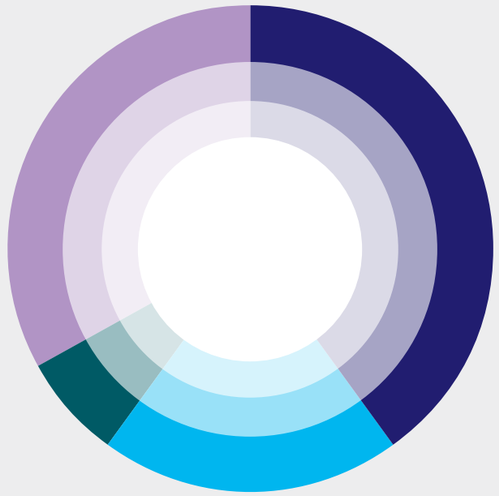
3.2.3 Regions with high demand for English language skills

All of the interviewees we spoke with in detail manage companies based in the capital city Algiers, although a number had field teams or satellite offices in other regions of the country.

The CNEPD identified Algiers and Tizi Ouzou as the two main regions in which it had experienced very high demand for vocational English language training. They also suggested that job seekers in the south of the country may aspire to learn English in order to work for international companies.

3.2.4 Wage differentiation for English speakers

When hiring for roles that require an intermediate, advanced or technical level of English language skills, do you find that...



- It takes a lot more time than recruiting for a similar role where French is required, **40%**
- This question does not apply to us, **20%**
- It takes the same amount time as recruiting for a similar role where French is required, **7%**
- It takes a little more time than recruiting for a similar role where French is required, **33%**

Source: Itri Insights

When hiring for roles that require an intermediate, advanced or technical level of English language skills, do you find that...

- You must offer much higher salaries than for similar roles where French is required, **13%**
- This question does not apply to us, **20%**
- You can offer the same salaries as for similar roles where French is required, **40%**
- You must ofer slightly higher salaries than for similar roles where French is required, **27%**

Source: Itri Insights

Of the company representatives who replied to our online survey and to whom this question applied, only one indicated that it does not take longer to hire English speakers than to hire French speakers for similar roles. One third of respondents suggested that it takes slightly more time to hire English speakers while 40 per cent said that it takes a lot more time.

On the other hand, 40 per cent of respondents felt that they did not have to offer higher salaries even if candidates with the required skills were harder to find. Of the five respondents that indicated they did not offer higher salaries for English speakers when compared with French speakers, three indicated that it took much longer to hire English speakers and one indicated that it took slightly longer to hire English speakers.

This reinforces much of the information we collected in our detailed interviews. Two of the business leaders with whom we spoke noted that they did not pay employees who spoke good English more than those in roles for which only French was required. However, one of the two did note that they also did not pay employees less even if their level of English was not really good enough for the role they performed. These business leaders work in the tourism and pharmaceutical industries, where English is not an integral part of the service provided. As such, salaries are pegged to an employee's technical skills or years of experience in the role.

On the other hand, even in companies in which employees may not earn higher wages as a result of their language skills, one business leader of a multinational company suggested that an employee may ultimately have access to more professional opportunities because when they speak good English, "they catch my eye, they stand out".

By contrast, a business leader working in consulting estimated that he would offer a salary that was 10–20 per cent higher for an English speaker with the appropriate level of language skills because it was essential to the functioning of his business.

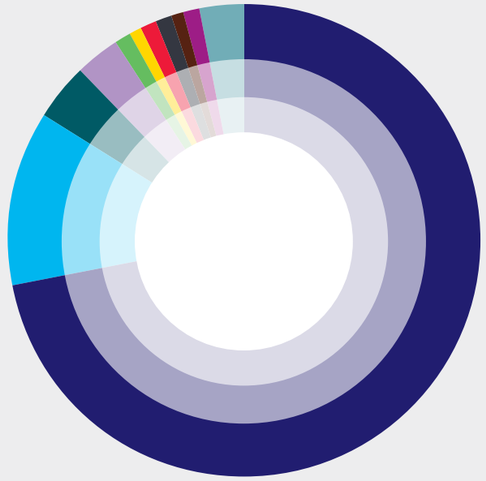
3.3 Quantifying the presence of international companies in Algeria

All of the interviewees with whom we spoke during this study, both Algerian and non-Algerian, in business or the Algerian administration, reported that demand for English from businesses in Algeria is strong. In addition, the idea of English as a global language in general and as a working language in business is well-established. As such, English is used by companies of all nationalities in many parts of the world, whether or not the business has any English-speaking ownership or direct interests. This would also appear to be the case in Algeria. For example, the co-founder of a translation company that has offices in Algeria, noted that her Algerian team communicates exclusively in English when using email, primarily because it is the language in which they deal with most of their clients.

Nonetheless, as discussed above, English does not appear to be the primary language used by Algerian companies to communicate amongst themselves or with the general public. Besides this, strong demand from a very concentrated number of companies may not necessarily indicate that demand is strong across the economy as a whole. As such, we felt that it was important to analyse the data regarding the number and nationality of foreign companies in Algeria in general, with an additional focus on those based in English-speaking countries.

Detailed and recent statistics regarding the number of Foreign Direct Investments (FDI) by nationality are not available in Algeria. The *Agence Nationale de Développement de l'Investissement* (ANDI) is the official government agency tasked with tracking foreign investment in Algeria. However, while the ANDI provides overall figures for foreign investment in Algeria, it does not provide a breakdown by country. In addition, it is only able to track investment from companies that declare their existence explicitly to the agency. In general, this covers companies that apply for investment support such as tax breaks or land rights through the ANDI, usually for large-scale industrial projects. Besides this, ANDI data only covers yearly inflows of FDI (i.e. new investments), not the overall FDI stock (i.e. all existing investments at any one time). As such, ANDI data does not allow us to see a clear picture of foreign investment in Algeria.

Anglophone companies by headquarters



Source: Itri Insights, CNRC

It is possible to search for companies with at least one foreign shareholder or a foreign manager via the database of the *Centre National des Registre du Commerce* (CNRC), the Algerian equivalent of Companies House. This is an inexact approach for assessing the number of foreign companies in Algeria, since it does not account for the origin of the foreign capital invested or the percentage owned by foreign entities. A company may have a foreign shareholder or manager regardless of whether it owes its existence to foreign investment. Nonetheless, in the absence of other data, this may still serve as a useful indicator.

3.3.1 Companies based in the 'Anglosphere'

Our review of companies with a shareholder or manager from six large English-speaking countries sometimes collectively referred to as the 'Anglosphere' produced the following figures:

Country	Active companies	De-registered companies	Total
United Kingdom	112	27	139
Canada	79	26	105
United States	77	19	96
Australia	10	1	11
Ireland	5	1	6
New Zealand	0	0	0
Total	283	74	357

Source: Itri Insights, CNRC

We subsequently analysed the aforementioned group of companies by the geographic location of their registered company headquarters. Unsurprisingly, Algiers was by far the wilaya with the highest number of Anglophone companies. Around 65 per cent of Algeria's population is resident in the wilayat along the country's northern coast and much of the country's economic activity is concentrated in the capital city of Algiers. It should nonetheless be noted that many companies are headquartered in Algiers, whether or not they have their main operational facilities in the wilaya.

The second most significant wilaya by number of Anglophone companies is Ouargla. Besides a very small amount of tourism and agricultural activity, Ouargla is principally known for the oil fields of Hassi Messaoud. This would appear to corroborate anecdotal reports that the oil and gas industry is particularly well represented amongst companies based in the English-speaking world who do business in Algeria.

3.3.2 Other foreign companies

To place these results in the general context of international companies in Algeria, we carried out the same exercise for Algeria's top foreign trade partners. Over the first 11 months of 2019 – the most recent date for which detailed figures are available – Algeria's top five import suppliers by value were China (18.55 per cent), France (10.09 per cent), Italy (7.98 per cent), Spain (7.01 per cent) and Germany (6.92 per cent). Over the same period, its top five export customers by value were France (14.16 per cent), Italy (13.19 per cent), Spain (10.98 per cent), the United States (6.71 per cent) and Turkey (6.18 per cent).

Excluding the United States, which has already been covered above, our survey of companies with a foreign shareholder or manager produced the following results:

Country	Active companies	De-registered companies	Total
France	N/A	N/A	N/A
Turkey	N/A	N/A	N/A
China	N/A	N/A	N/A
Spain	731	139	870
Italy	621	129	750
Germany	115	40	155

Source: Itri Insights, CNRC

It will be noted that it was not possible to provide this metric for companies with a French, Chinese or Turkish shareholder or manager. This is because the CNRC database cannot list more than 1,000 results at a time and instead returns an error message when the results are too large to display.

In the case of French companies, not only did the database return more than 1,000 results when searching for companies with a French shareholder or manager across the whole of Algeria; it also returned more than 1,000 results when searching only within the wilaya of Algiers.

Narrowing the search down further to the municipality of Hydra in the wilaya of Algiers, the database returned 117 active companies. In other words, there are more companies with a French shareholder or manager registered in Hydra – a municipality that covers an area of 6,8km^2 – than there are companies with a shareholder or manager from the United Kingdom in the whole of Algeria. Hydra is an affluent municipality in the capital city that is home to a high concentration of international companies. As such, it is unlikely to be representative of all of the country's 1,541 municipalities. Nonetheless, there is a stark discrepancy between the number of companies with French shareholders or managers and those of other countries.

It was also not possible to arrive at a definitive figure for companies with a Chinese or Turkish shareholder or manager. Within the wilaya of Algiers alone, there were 681 active companies with a Turkish shareholder or manager and 668 active companies with a Chinese shareholder or manager.

While it is not possible to provide definitive figures for the number of international companies in Algeria, it is clear that companies with French shareholders or managers are more numerous than those of other nationalities. It is also probable that there are significantly more companies from non-Anglophone countries than from Anglophone countries. As a result, it is probable that the largest volume of English language demand from non-Algerian companies in Algeria will come from companies based in non-English speaking countries but that use English as a working language.

4

Vocational English language teaching provision

4.1 Relevant literature on vocational English language teaching provision

Nawal Mebitil has published a Master's thesis entitled: *An exploration of the main difficulties, challenges and requirements of the ESP teaching situation in Algeria (2011),* which looks at ESP Teachers at Abou Bekr Belkaid University in Tlemcen, north-western Algeria. Mebitil and identifies a number of factors that hinder the current delivery of vocational English language teaching in Algeria including:

- Factors involving learners
  - Lack of motivation
  - Mixed ability groups
  - Attitudes towards the English language negatively affecting attendance
  - A general lack of respect towards teachers.
- Factors involving teachers
  - No prior training in teaching English for Specific Purposes (ESP)
  - Lack of cooperation between teachers and subject specialists
  - Lack of specialised knowledge on the target materials being taught.
- Organisational issues
  - Insufficient time allotted to courses
  - The absence of a syllabus to follow.

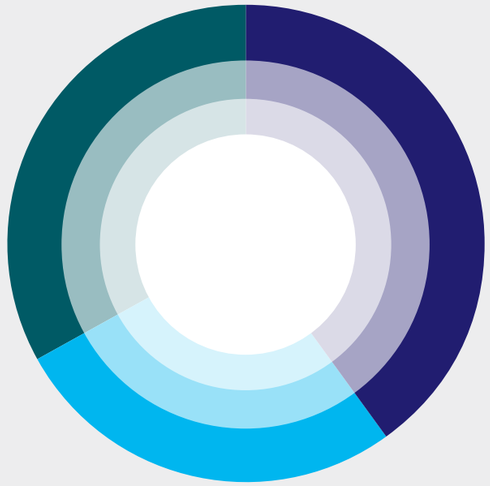
Factors highlighted above are those that were also identified as barriers by business leaders or institutional stakeholders in the course of our research.

A more recent Master's thesis from 2015, English for specific business purposes: The teachers' content and context acquisition case study: ESBP Teachers in Oran by Nabila Hentit, also identifies "the absence of any ESP department in Algerian universities" and a lack of "specialist knowledge for a complete comprehension of target materials" as obstacles to successful Business English teaching and learning.

These sources provide an interesting counterpart to evidence gathered during the course of our research. As a general rule, employers were able to articulate that they could neither recruit nor train the English language skills they require for doing business but were less able to link this to specific obstacles to language teaching or learning.

4.2 Perspectives on vocational English language teaching provision

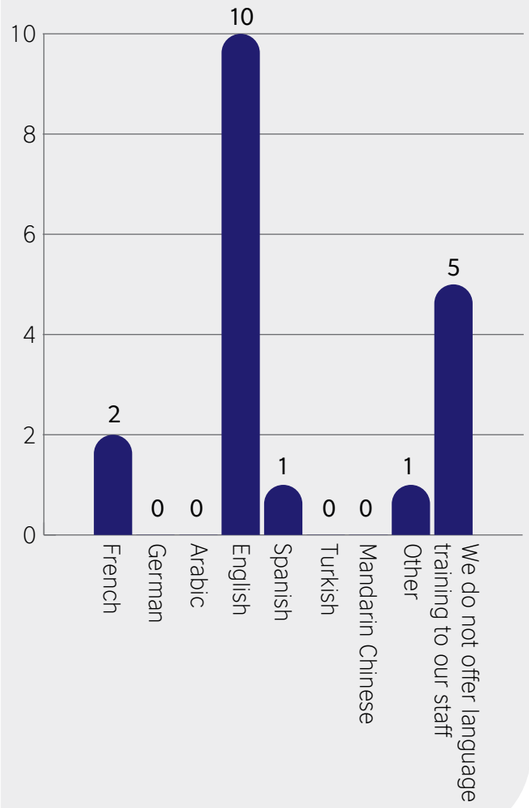
Do you routinely offer any language training for your local staff in Algeria?



- Yes, for anyone who asks for it, **40%**
- Yes, but only for specific job roles, **27%**
- No, **33%**

Source: Itri Insights

If you do offer lanuage teaching, which languages do you currently offer?
(respondents may choose multiple answers)



Source: Itri Insights

According to the results of our online survey, 33 per cent of companies indicated that they do not currently offer any language teaching for their staff. However, a closer look at the results reveals a certain logic to this response. Indeed, all five companies that do not currently offer language training had previously suggested that the level of spoken English of their employees was generally appropriate for their needs or slightly exceeded the required level. Similarly, for written English, four of the five had indicated that the level of English was generally appropriate or slightly exceeded their needs, while one had suggested that the level of written English falls only slightly below the needs of his or her company.

However, of the companies that do currently offer language teaching, either to anyone who asks for it (40 per cent) or just for those in specific job roles (27 per cent), English was by far the most frequently offered language and was offered by all ten companies that provide language training to their staff. Other languages offered include French, Spanish and another unspecified language.

Of the companies who currently offer English language teaching to their staff (a total of 11), seven (64 per cent) felt that the level of teaching met their needs while four (36 per cent) felt that it did not.

The level of satisfaction with vocational English language teaching provision indicated by the results of the survey contrasts slightly with the information we gathered from our in-depth interviews in that most interviewees felt that current English language vocational training did not provide the results they required for business purposes. It is possible that this may be a reflection of the fact that the survey was distributed to a broad list of recipients but also directly to the British Council's own distribution list. Those replying to the survey as a result of their connection with the British Council may have been more reluctant to express a negative assessment of English language teaching provision or may genuinely have a higher level of satisfaction with the English language teaching provision they receive. On the other hand, the detailed interviews were carried out with stakeholders from outside of the British Council's own network.

Interestingly, two of the companies who expressed that they were satisfied with their vocational English language teaching left additional comments in the open-ended questions at the end of the survey suggesting that they nonetheless had recommendations for improvements. One indicated that they used an independent "teacher/consultant" to provide vocational English language teaching for their staff rather than a company because of a "lack of choice". The second suggested that "organisations (schools, institutions etc.) should invest more in their English teachers by providing them frequent training, monitoring."

In our detailed interviews, when interviewees felt that current vocational English language training did not provide the results they required for business purposes, they sometimes attributed this shortcoming to teaching centres. However, as might be expected from non-teaching interviewees, their feedback was largely general – e.g. "they're not doing their job properly" – rather than specific to teaching approaches or practices. Other comments tended to focus on the teachers' level of English presenting an obstacle, for example, "sub-standard [English] translators end up as teachers", rather than their teaching skills per se.

From an institutional perspective, the CNEPD suggested that "universities currently don't provide graduates with a sufficiently high level of English for the workplace". Its representatives believe that while business really needs highly specific, technical English language teaching, teaching institutes are not able to provide this because candidates and employees don't know "the basics of the language". The CNEPD representatives feel that the overall level of English language skills needs to be raised before it can be adapted to genuine business needs.

However, not all business leaders appeared to agree with this order of priorities. The CEO of an Algerian technology company suggested that English language training was not suited to his staff because "lessons are directed towards the general public. They need specific technical language trainings that are geared towards their industry segment, not just general language and grammar." Notably, he cited the

example of the Cervantes Institute, which he suggests provides "highly specific" classes for Spanish language learners. He has not found the same provision for vocational English.

The co-founder of a translation company believes "there is a chicken and egg situation with the use of English language in business. There is no high-quality English teaching available, therefore people give up and turn towards French as an alternative". She also suggested that if there were more "cultural events", people would feel more engaged with language learning. Another interviewee in the services sector concurred that teaching centres "lack a well-rounded and modern approach that takes into account culture and everything else involved in learning a language".

Four business leaders suggested that learners were at least partly at fault for their lack of progress when following English language lessons. Two suggested that this was because candidates "were not serious about learning the language" or took classes for just "four or five weeks". A third suggested that it was to be expected that not everyone would "have an aptitude for languages" while the fourth indicated that language learners in Algeria "don't understand the commitment required to learn the language" potentially because they first need to "learn how to learn".

However, three business leaders noted that many young Algerians try actively to improve their own language skills by watching TV or films in English. Some also made the link between this self-taught approach and the prevalence of candidates who have "good accents" but lack writing skills.

The idea of English language teaching and learning as performative was also present in many responses. One business leader suggested that learners "may be more interested in sounding like they can speak English than genuinely using it as a business tool" while "trainings may not be focussed or required to deliver on their promises, therefore they're not good quality." This also translated into the idea that job seekers may "collect" a dossier of certificates in order to bolster their CV, even though both employee and employer may be aware that the certificates are of little practical worth.

4.3 Quantifying the presence of English language schools in Algeria

It is difficult to arrive at an authoritative figure for the number of language schools offering English classes in Algeria. We have nonetheless gathered the available data from the CNRC. CNRC data in general presents a number of issues (see the notes on **Challenges**). In addition, the activity code relating to language teaching institutes (*607014: Etablissement d'enseignement de langues*) does not enable us to distinguish between institutes offering different languages or different kinds of teaching (adults, children, vocational, specialised).

Besides these issues, it should also be noted that there is no limit on the number of activity codes that a company may add to its official registry upon its creation, with the caveat that some activity codes require that companies acquire an official licence or permit for some activities. In addition, it can be time-consuming and bureaucratic to add new activity codes retroactively once the company has been created. As a result, it is common practice for companies to add a significant number of activity codes to their official registry at the outset, in case they might one day need them, whether or not this forms part of their actual service offering.

There is also no way to distinguish between a company's main activity and secondary activities, which makes it difficult to establish whether a company is actually engaged in an activity or not.

Nonetheless, the source remains the official registry of companies in Algeria and the only relatively quick way to estimate the number of companies in any given sector.

Our review of language teaching establishments via the CNRC database produced the following results:

Wilaya	Active	De-registered	Total	% of total
Algiers	638	195	833	58.3%
Oran	69	22	91	6.3%
Sétif	35	15	50	3.2%
Constantine	35	14	49	3.2%
Bejaia	31	8	39	2.8%
Boumerdes	28	9	37	2.6%
Blida	27	7	34	2.5%
Ouargla	27	8	35	2.5%
Annaba	23	6	29	2.1%
Tizi Ouzou	22	8	30	2.0%
Other	159	52	211	14.5%
TOTAL	1,094	344	1,438	100.0%

Source: Itri Insights, CNRC

The results would appear to bolster anecdotal reports that the majority of teaching institutes are concentrated in Algiers, with a smaller number in the major cities of the north of the country. The outlier in this group is Ouargla, which, as discussed above, is home to a large number of oil and gas companies and is therefore likely to have a larger requirement for employees with foreign language skills than some other areas of the country.

Five wilayat from a total of 48, namely Saida, El Bayadh, El Tarf, Khenchela and Naama, do not currently have any active registered language teaching institutes according to the CNRC.

5

Recommendations

Work with industry experts to design technical and industry-related vocational English language teaching

53 per cent of employers surveyed stated that they require industry-specific technical English language training for their staff, particularly in the telecoms, IT and other emerging industries. By law, all employers already have an annual budget earmarked for staff training. Working with industry experts and employers could also lead to the design of teaching programmes that more clearly meet this need and lead employers to spend on teaching that actually adds value and raises standards.

Ensure teachers have knowledge of the sector-specific target material for which they are providing vocational English

The abundant literature on ESP provision in universities consistently points to a lack of knowledge about the industry-specific target materials used in vocational teaching, leading to a loss of engagement from students who may not see the training as pertinent to their professional development. This is compounded by the lack of subject specialist teachers generally filling these posts, with English graduates with no prior teacher training or subject knowledge of the disciplines they are supposed to teach. 100 per cent of research and teaching staff and postgraduate students interviewed across the country stated that they needed more support for writing, presenting and publishing in English, which is becoming a requirement in all academic fields. Providing teachers with the tools to understand industry topics in more depth, or enabling teachers to specialise in particular industry segments, may reduce the impact of this constraint.

Ensure teachers are trained on teaching English for Specific Purposes (ESP)

The abundant literature on ESP provision in universities shows that teachers in Algeria are not routinely trained in approaches designed for learners who use English for a specific business purpose. On the business side, employers report that they have difficulty finding candidates with appropriate language skills and they find that current vocational solutions do not provide the required results. Ensuring that teachers are trained in ESP teaching techniques may lead to increased employer/employee satisfaction with current vocational teaching provision.

Provide ready-to-go vocational training options for Algerian state institutions

State agencies are keen to work with the British Council, particularly in the context of the current government drive towards increasing the use of English in Algeria. The CNEPD is very keen to see if there are opportunities to provide access to certification via the British Council, which they see as valuable, while the British Council would enjoy increased exposure through the state's own efforts to promote vocational training. However, government institutions may not move with the urgency that is sometimes seen in the private sector. The British Council may need actively to design and drive any such initiatives forward.

Equip language learners with the tools to learn and set expectations

It was suggested that Algerian learners in general, and particularly those who are already part of the active workforce, may not have been provided with the tools during their school and university education to allow them to learn effectively. Learners may not understand the approaches that will enable them to succeed, may not understand the time or commitment required to achieve language proficiency and may become discouraged if they do not see results in the short term.

Provide fast-track or intensive solutions

Employers require experienced employees with English language competencies today, but do not expect to find them on the Algerian labour market for some years. Where practicable, intensive courses or fast-track solutions may assist employers in training up their existing experienced staff today, as they wait for junior talent to come through.

Consider SMEs, not just large companies

Algeria's economy is intrinsically concentrated with a large portion of economic and commercial activity in the hands of a small number of actors. However, given the historic lack of English language skills available on the Algerian job market, many multinational employers have "lowered their standards" for Algeria and/or dealing with tasks requiring English overseas. Small and medium-sized enterprises (SMEs) do not have this option available to them, if they want to compete internationally, they must nurture their own English language skills inside Algeria. These companies exist in increasing numbers, particularly in high-demand sectors such as IT and could constitute a significant – if fragmented – potential market.

Diversify the provision of training that leads to certification

Employers recognise that certificates are often worth relatively little as a guarantee of quality teaching and learning. However, they understand that many employees do still prefer to take training that leads to certification and they sometimes use this as a means of attracting and keeping employees. Courses that lead to certification are likely to continue to be popular in the coming years as approaches to recruitment and competition in the job market – and the economy as a whole – may take a significant period of time to evolve.

Raise the profile of English-speaking culture with cultural events

Employers feel that one of the obstacles facing staff required to speak English in the workplace is the lack of opportunities to experience language in a natural environment and sometimes a lack of a desire to learn. Boosting the profile of English-speaking culture and creating a more engaged ecosystem around the learning of the English language in Algeria could contribute to alleviating these issues and raise the profile of the British Council as the vector for all things 'English' in Algeria.

6

Challenges and areas for future investigation

Covid-19, surveys and interviews

The period set aside for carrying out the interviews and surveys required to gather the evidence base for this report coincided with the intensification of efforts to combat Covid-19 in Algeria. This saw the introduction of significant travel restrictions, including the closure of all international airports and the country's land and sea borders, and subsequently, the gradual implementation of increasingly stringent social distancing measures, including the total lockdown of some wilayat and the introduction of a curfew in the capital city Algiers. As a result, many of the key individuals that we had hoped to interview or survey – namely CEOs, business leaders and HR professionals, particularly those with links to international business – were justifiably preoccupied with handling the immediate issues of ensuring the health and wellbeing of their employees, repatriating their non-Algerian employees and/or dealing with remote working or other business continuity challenges during this time. As such, we received substantially fewer responses to our survey than we had hoped at the outset, though extending the timeframe of the study helped to gather more. In addition, some of the interviews we had hoped to conduct in person were ultimately carried out over the phone. To lessen the impact of these events on the results of this study, we have used a variety of additional sources and approaches to look at the way vocational English is being used in Algeria.

Specific industry needs

Throughout our primary research, a recurrent theme was the need to develop teaching programmes and approaches geared towards learners of specific technical language skills. However, given the timeframes involved, it was not possible to meet with multiple HR and training professionals within each industry segment and discuss exactly what this specific training might look like for each industry. *Additional research involving HR and training professionals within companies would be needed to lead to the design of specific teaching courses that are highly adapted to genuine business needs.*

A business landscape in transition

Algeria's business landscape is still very much in transition. Following the resignation of former President Abdelaziz Bouteflika in April 2019, a significant number of businessmen have been imprisoned on corruption charges and a number of key private companies are now facing financial difficulties or even closure. Business leaders' groups are also being completely reorganised. As a result, a substantial portion of the business landscape in Algeria has been effectively dismantled and has not yet been rebuilt or replaced. *It would be informative to look again at the use of English in Algeria in a year to 18 months' time, once the 'new' business landscape has had more time to emerge.*

CNRC records

The Centre National du Registre du Commerce (CNRC) is the Algerian equivalent of Companies House and holds a database of all companies registered in Algeria. We have used data from this source at a number of points throughout the report. Given the tight timeframes involved in this study, it was not possible to carry out manual checks to verify that the companies listed in the CNRC database do indeed exist and are still trading. However, our manual checks of CNRC records for previous studies suggest that as many as 30 per cent of registered companies may in fact be 'ghost entities' i.e. companies that exist on paper but have either never filed accounts or have not done so for several years. Ordinarily, companies such as these should be removed from the registry or marked as 'de-registered'; however, in practice, this may only happen if the company itself files the relevant paperwork with authorities to request that they be de-listed. As such, many companies cease to exist but still appear as active according to official records. The percentage of ghost entities may vary considerably from industry to industry, but it is generally prudent to assume that the actual number of companies is lower that the figures presented in this report. *A further study period would enable manual checks to be carried out to firm up these numbers.*

Literature on English for business in Algeria

The available academic literature relating to the use of vocational English is limited and often takes the form of highly localised case studies and Master's dissertations. *Additional academic research would be needed to gain a full understanding of the regional and industry-specific use, demand and provision of vocational English in Algeria.*

Vocational training tax

Algerian companies are required to spend a portion of their revenues on professional training. *Given a longer timeframe, it could be interesting to examine more closely the extent to which employers do spend the required amount on training, the extent to which non-payment is enforced via taxation, the amount of money currently spent on vocational training and the amount of money currently spent on vocational English language teaching, amongst other questions.*

7

Appendices

7.1 Interviews

7.1.1 Interview 1

Name: Anonymous
Position:

- An official representative of the National Centre for Professional Distance Education (CNEPD)

The CNEPD operates under the aegis of the Ministry for Professional Training, which offers three different kinds of training, namely in-person training, apprenticeships and distance learning. There are approximately 500,000 learners across the whole of the system, with 30,000 learners currently taking training through CNEPD. They start classes in February or September.

There are around 1,200 centres across the country for taking in-person classes. The course options cover a wide range of topics including agriculture, tourism, administrative roles, beauty training, childcare etc. There are also 'a la carte' options.

The CNEPD started in 1984 and offered correspondence classes. In the 1990s the organisation made the switch to offering lessons via telephone, with limited success. Now they offer courses via an online platform and on CD Rom. However, they usually use a mixed format with some in-person teaching because it's what the students want.

The CNEPD has nine of its own regional branch offices and also uses some of the centres that belong to other branches of the Ministry.

The CNEPD's remit is to design the courses in alignment with the priorities set out by the Ministry. They produce content in French and Arabic.

Currently, the CNEPD offers only basic English. They have identified demand for specific technical English language teaching for tourism, industry and pharmaceuticals. However, they believe that they must first teach basic English skills before moving on to more technical English. They suggest that they can't offer this yet because the base level of English is not good enough. They also believe that universities currently don't provide graduates with a sufficiently high level of English for the workplace. People need operational English that is specific to their specialisms. They want to be able to include English on their online platform but they haven't yet been able to do so.

The CNEPD has access to all of those working within the Algerian administration. They believe that there is demand within the administration for English language teaching.

The CNEPD is very keen to see if there are opportunities to work with the British Council. They believe there are opportunities to provide access to certification via the British Council, which is seen as something very valuable.

The CNEPD believes that people in Algeria are still used to working with a teacher in the classroom environment and the best format, even for distance education, is to use a mix of formats.

They believe that people want to learn English as a gateway for working in multinationals, particularly in the south of the country. They also believe that most 'information' in the world is in English and therefore people want to learn English as a tool for self-betterment.

All companies must pay for training or pay the "taxe de formation continue" and language learning counts towards this.

The CNEPD doesn't really offer French lessons regularly because they don't get demand for that. They offer some technical French and Arabic language modules such as 'official correspondence' classes. Whereas for English they offer more basic language and grammar lessons.

The CNEPD has difficulty reaching all of the regions in which it would like to offer training. For example, in the south, the distances are so large and the population is so spread out that it doesn't make sense to run in-person lessons. Also internet speed is a problem. The CNEPD is currently responding to this problem by rolling out pilot programmes in a small number of wilayat and then opening additional pilot programmes once they have been proven to be successful.

Algiers and Tizi Ouzou are the two regions where the demand for English language training is most strongly expressed.

The CNEPD believes that the current generation of Algerian graduates is more Arabic-speaking than French with regard to those coming into the public administration. They also believe that Algerian parents are happy to spend money on their children's education.

7.1.2 Interview 2

Name: Anonymous
Position:

- A member of the Forum (previously known as the Algerian Business Leaders' Forum or FCE)
- CEO a private Algerian IT solutions provider.

At his own company, the technical, sales and management teams all use English but everything related to business support services (administrative roles, security etc.) doesn't require English.

They deal with all of their suppliers – whether over the phone or via email – in English. They previously worked with Austrian and German suppliers and would communicate with them in English. The team also has suppliers in Dubai and the Middle East and they communicate with them in English rather than in Modern Standard Arabic (MSA).

For sales, they use French because they sell exclusively into the Algerian market and they do not find English speakers in the administrative or support roles that they come into contact with through their sales activities.

There is a real divide in the kinds of English speakers he sees in the workplace. There are those that left university six or seven years ago speak English but they aren't comfortable using it. They have difficulty and it's harder for them to express themselves or use it as a tool to improve their technical skills.

By contrast, the new generation of engineers that left university more recently speak great English. In general, they don't graduate out of the elite universities because the elite universities tend to be more French-speaking and rooted in the French way of doing things. The engineers who speak better English tend to have graduated from middle-tier universities that focus on technical training. The best English-speaking candidates come from technical training programmes in wilayat where the impact of arabisation has been more strongly felt. They understand that English is the future rather than being focused on the French-speaking world.

For writing in English, Algerian employees often stick to using Google Translate. They don't really have the opportunity to write and converse with native English speakers so they don't get the practice.

The company does prioritise English language skills when recruiting technical staff. It's obligatory for technical staff, which means it's obligatory for about 60–65 per cent of employees. When recruiting technical staff, if they don't speak English they're eliminated outright. It definitely hinders them.

For sales people, English is less essential.

The company actively looks to recruit English speakers but they usually can't find both the language and the technical skills in the same candidate. They do offer accelerated training courses in English for employees who need English for their job role.

However, the English lessons are not suited to their needs. They find that the lessons are directed towards the general public. They need specific technical language training geared towards their industry segment, not just general language and grammar. The Cervantes Institute provides this for Spanish learners. Their language provision is highly specific and the students that follow courses through the institute progress rapidly. This has not been the case with the English language courses that the employees have followed.

With regard to business in general, Algeria's whole business model today is still based on the French system. The management styles, the management tools, the administration. Everything is based on the

French way of operating. Only a few sectors break this rule, but the IT sector is one of them. He believes that 'depending' on France is a handicap for the business world in Algeria and stops the country taking advantage of all of the opportunities that may be available.

With regard to the Forum (previously known as the Algerian Business Leaders' Forum or FCE), the 'old FCE' was very francophone. Their whole way of functioning and their way of operating were geared towards the French-speaking business community. However, the new generation of business leaders that is now beginning to move up through the existing family companies have generally done the equivalent of a Masters' Degree (Bac+5) and are completely comfortable with English.

Broadly speaking, there are two categories. There are those who studied in French and have come back to Algeria. They tend to remain very focussed on France and doing business with France. Meanwhile, those who stayed in Algeria have mixed with people of all nationalities and have seen the importance of switching to English. English is the language of science and technology today. Their suppliers are in the Middle East or the USA, or in Europe excluding France. They talk with them all in English. They even deal with some suppliers in other parts of Africa in English. Today, Algerian managers are not "hung up" on English; they're comfortable with it. People are becoming trilingual or even quadrilingual.

Today, a British or American ambassador can bring a businessman who only speaks English to meet with the Forum or representatives of Algeria's business community and they'll be able to communicate. They may not be able to speak perfectly but they will be able to make themselves understood. That wasn't the case before.

7.1.3 Interview 3

Name: Anonymous
Position:

- Member of the Women's Entrepreneur Club
- Co-founder of a translation agency with offices in Europe and Algeria.

In her own company, all internal communication via email and over the phone is carried out in English because the company communicates with most of its clients in English and has operational staff of many different nationalities. It is company policy to communicate in English.

With regard to recruiting English speakers, she doesn't recruit Algerians for translating into English because she requires a 'native level' of English language for this. She has not yet found any candidates with native-level English. She finds that people tend to overestimate their competencies. Sometimes a candidate may think they speak English at a native level because they may not have left Algeria and therefore they haven't ever tested their language level against actual native speakers.

Since a lot of candidates acquire much of their English through watching TV series, they often have an excellent accent and level of spoken expression. Their level of spoken English may be much more advanced that you would find in other countries such as France. However, the written language doesn't match the spoken competencies.

Those who speak great English, in her experience, tend to be those who are primarily Arabic-speaking and have a personal aversion to French. She had an employee who spoke excellent English primarily because the employee's family "didn't like the French" and actively encouraged her to speak English. Additionally, having access to digital technologies and an openness to the world seems to predispose candidates to take an interest in English.

Recruiting English speakers is really difficult because the recruitment channels in Algeria don't function well to begin with. This applies across the board but particularly to English. You can't hire someone with a particular qualification from a particular school and expect them to master the skills they need because their certification doesn't guarantee that.

She has found that if she recruits translators who have previously worked for pharmaceuticals companies, the language is better because they tend to work in English on a regular basis.

She is not convinced by the quality of English language teaching and learning in Algeria. Part of this is because she interviews a lot of former teachers who apply for translation positions at her company. In general, she finds that English language teachers in Algeria are often individuals who have studied translation but didn't have the required level to succeed as translators. As a result, sub-standard translators end up as teachers. They do not have an in-depth or nuanced understanding of the language, and they may not have much in the way of teaching skills either.

She finds that younger students, those graduating in the last few years, generally have a better level of English and she has seen this working with other business leaders and entrepreneurs through the Women's Entrepreneur Club.

She believes there will be an increased push towards English with the current government backing. There is demand for the competencies today but the supply of English-speaking graduates won't be available immediately. It also needs to happen in the right way.

She believes that if the economy opens up more to the rest of the world, there will be even more demand in business for English. However, this topic has been on the table for a while and hasn't really progressed. There are no Erasmus programmes with Algeria. Any student exchange programmes that do exist are with France.

She also believes that if there were more cultural events at the British Council, people would get more involved and take a greater interest in the language.

There is a chicken and egg situation with the use of English language in business. There is no high quality English teaching available, therefore people give up and turn towards French as an alternative.

She also notes that she struggles to convince companies in Algeria who approach her for translations that they require native-level English translation. They would often be happier paying less for a text that isn't professionally translated. She believes this is because companies here are used to 'making do' with what there is, rather than applying the same professional standards that might be required elsewhere.

7.1.4 Interview 4

Name: Anonymous
Position:

- Founding member of a new business leaders' organisation currently under development
- CEO of a private Algerian tour agency specialising in business travel.

With regard to his own company, all members of the team should speak English because it would enable them to be more efficient. However, as things currently stand, only four members of the 15-member team speak English because the competencies aren't available on the market. Currently, only company management and the sales team use English.

Both the company's clients and suppliers use English.

Only two of his team members speak good English while the remaining two speak OK English.

Mastering the English language doesn't lead to higher salaries in the tourism industry because salaries are banded according to technical skills and competencies, even though English speakers are harder to recruit. Although English is essential, it's still a secondary consideration after technical skills.

The company does not currently offer English language training to its staff for two main reasons:

1. The candidates themselves are not serious about learning the language. They don't apply themselves and don't take advantage of the training provided to them.
2. Language schools aren't doing their jobs properly. They're more like leisure centres than language centres. They supply a certificate but it's not really worth the paper that it's written on. The only schools that provide genuinely useful language training, in his experience, are those that are directly linked to embassies and consulates.

As a general rule, it's impossible to find both the English language competencies and the technical skills he needs in candidates.

7.1.5 Interview 5

Name: Anonymous
Position:

- CEO of an international telecommunications company with offices in Algeria.

The company needs a lot of people who speak English because telecoms requires English wherever you are in the world. However, they really struggle to find candidates with experience in their given field who also speak English. They can't train people for technical roles overnight, it's a process that takes many years.

The company also requires English language competencies in the sales department and they are unable to find this easily either. They sell to clients within Algeria but the clients are usually multinational corporations within the country, so they communicate in English.

The company does provide language training and courses. In fact they have offered a lot of different English language training courses. However, people tend to follow the courses for a month or two and then give up and this doesn't seem to help them progress. They need ongoing training.

The company relies on emails to be able to get things done and around 80–90 per cent of company emails are in English.

The CEO definitely feels that the company is limited in its growth in Algeria because they can't get English-speaking staff, which means that he has to do much more of the sales and operational work himself. He is unable to delegate large amounts of his work because his staff don't have the English language skills to be able to communicate with clients. He thinks the standard of teaching on the available courses is fine but they need to do it for longer than four or five weeks.

7.1.6 Interview 6

Name: Anonymous
Position:

- Country Head of an international pharmaceuticals company with offices in Algeria.

Almost everyone within the organisation uses English language in the context of their work. All of the leadership team use it; also all those who have to be in contact with people overseas either within the company or externally, including global marketing, regulatory etc. If they don't speak English it becomes a challenge for them.

Most of the people in these roles can speak English to some extent, but not all of them are fluent.

When the company hire new staff in Algeria, they now always make speaking and writing English a mandatory requirement.

At the bottom tier, staff don't really have interactions with colleagues outside of the country or with managers. They don't speak English and it's manageable. But this is only at the very bottom level. The field teams don't need English either because they are in contact with doctors on the ground and the doctors speak French. The lower level employees use French to communicate with each other within the teams, with banks and with the local administration.

Even at senior levels, the level of English language skills varies. Some are really good and some not so good. They use English not only to communicate with colleagues or management overseas, but also when working in Turkey, Dubai and the US amongst others.

Salaries do not tend to be higher for candidates with excellent English language skills because salaries are scaled according to a standardised company grid that takes into account technical skills rather than languages. They wouldn't be offered a higher salary because they have good English language skills, but nor would they be offered a lower salary if their English were not really up to the standard required.

The company does find that it must hire staff with specific skillsets that don't have the required level of English because they are unable to find both at once.

The level of English language skills is a challenge because people's capabilities differ substantially. Communication may take longer and be less efficient. Sometimes people need help and correction. The pharmaceutical company in question is a multinational company. When working in other parts of the world, the interviewee would be more demanding about the use of English. When arriving in Algeria, initially he corrected grammar, full stops, commas etc. But now he has stopped. As long as the message is getting through he doesn't worry too much about the grammar or language being correct. In another country, he would have made this an area of focus. He has learned to be more patient with people at different levels within the organisation.

The company provides training via an internal online tool for all staff globally. This varies from basic online training to instructor-led training. Some training is free whereas some has a cost that must be approved in advance by management. Depending on the person's capabilities, role, needs and level of English, they may be approved for additional training. At the level of top management, they will offer an in-person teacher.

He understands that not everyone has a willingness to learn languages or an aptitude for learning them. On the other hand, some employees really apply themselves to the online learning modules and also make efforts in their spare time such as by watching English movies. HR likes to promote the message that 70 per cent of professional development is down to the individual.

The Country Head himself does not speak French or Arabic, so Algerian staff use English to communicate with him although he is not a native English speaker. In some ways, employees may have more opportunities to progress in this context because if someone has great English skills and is able to chat with him comfortably, they stand out, they catch his eye.

7.1.7 Interview 7

Name: Anonymous
Position:

- CEO of an Algerian consulting firm.

The operations and sales teams are the people that use English most within the company. The reason is that they work with all kinds of clients and if they want to be competitive on the international market, they need English. However, it isn't required for local clients and not for all international clients, so it's not the main priority for the company.

Technical competencies and soft skills have become less important than English language skills because of the need to compromise. The CEO would prioritise someone who doesn't have technical skills but already has good language skills over someone with less good language skills but good technical skills.

The company mainly uses English to produce deliverables and also for sales and marketing.

The CEO finds that he already struggles to find candidates with a high level of written French, so he has had to de-prioritise English. If he were in a more competitive environment where English is the norm, he would make it an essential requirement. But in Algeria he has had to let go of this idea. The CEO needs candidates at a 'native level'. This is because of the nature of the services industry in which native level language skills are important.

The growth of the business is hindered by the lack of language skills and learning skills as a whole and the lack of English language skills specifically. There is business that the company can't take on because it doesn't have access to the right people to work on these projects. This is the main obstacle to the growth of the business. However, this doesn't just relate to English but rather to language skills as a whole.

The company's local staff don't currently use written English for their work but they would if they had the required levels. For the kind of work the company does, he doesn't distinguish between technical and advanced language because when you're at a native level there's no distinction. 'Native-level' English language skills are almost non-existent. No Algerians speak English as a first language and only very

exceptionally as a second language, so at best it will be a third language. They often also struggle with the first two.

It can take over a year to hire candidates with a high level of English language skills. It takes as long as it takes you to make a compromise and lower your standards. You don't want to lower your standards immediately.

With regard to salaries, to attract a candidate with a high level of English language skills, the CEO would offer a salary that was 10–20 per cent higher than for a French speaker. The level of English really does matter to the work so he needs to attract them. The company is happy to offer a premium to attract English-speaking candidates.

Training is only half of the problem. The CEO finds language instruction in Algeria to be a bit old-fashioned, with a focus on learning grammar rules and studying for an hour a week. But this isn't actually how people learn languages. Some of the ingredients are missing. Candidates don't have genuine drive. They may be more interested in sounding like they can speak English than genuinely using it as a business tool. They often don't understand the commitment required to learn the language. The CEO hasn't really come across any candidates over the age of 20 who were really interested in learning.

With regard to the teaching centres, they lack a well-rounded and modern approach that takes into account culture and everything else involved in learning a language.

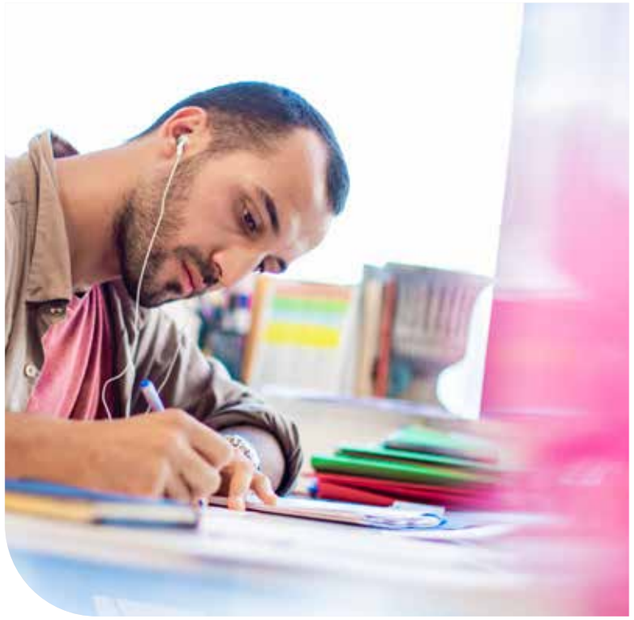
In the job market, there's a lot of "talk" from other employers. They say they care about English but they don't. They'll hire the guy who's cheaper if he's able to string a few words together, rather than the more expensive guy who speaks English. Competency isn't valued.

It's a legal obligation to provide training. Besides that, it's also a marketing tool to attract candidates. Therefore it's more about image and legal obligations than actual needs. The training may not be focussed or required to be delivered on their promises, and therefore it's not good quality. It makes for token learning rather than genuine learning.

The CEO believes that competition will increase within the Algerian economy. New business opportunities will need to be found and English will be needed in order to make the most of them. He doesn't have an idea of how fast that will happen. It could happen in a few months or over several years. The more the economy is required to perform on a global scale, the higher the demand will be for vocational English training.

With regard to training, new methods are needed to meet the challenge and compensate for the lack of understanding of how challenging it is to learn a language, both for employees and employees. It's not about going through the moves. People first need to learn how to learn before they can learn the language itself.

The CEO has seen other countries start out with a much lower level of English, but because the economy created demand for English, there was a positive dynamic and he sees the same thing happening in Algeria. He is hopeful for the future. But he needs these skills today and he thinks they won't be available for at least five years. There is demand for real, concrete solutions.



7.2 Survey results

While online surveys generally provide limited results for business-to-business research questions, given the short timeframe involved in compiling the data for this report, it was decided to gather additional inputs from business leaders and HR professionals using this tool.

A survey was designed on Google Forms and distributed via email. The survey was primarily filled in independently by participants online; however, a Word format version of the survey was sent on request to one recipient facing technical challenges. In addition, four surveys were carried out over the phone and filled in by researchers as a means of encouraging additional participation.

The survey was sent to an initial list of 179 representatives of companies in Algeria that appeared likely to use English as a result of known foreign-ownership, international sales or supply activities, participation in international chambers of commerce or other indicators.

The survey was also sent to a further list of 20 companies who were identified as advertising job roles requiring either written or spoken English during the period of this study.

Finally, the survey was additionally shared by the British Council with its own contact list.

The survey received a total of 16 responses. Of these, at question seven, one respondent replied that no employees at his or her company use English, even rarely. Since the remaining 18 questions of the survey focus on *how* English is used within the workplace in Algeria, this respondent's replies were not included in the analysis, leaving a total of 15 respondents for all except question seven.

Of the respondents who replied to the survey, 60 per cent were CEOs while 33 per cent held other executive roles and seven per cent (one respondent) was a HR professional.

The sample primarily comprises private companies (80 per cent), while two companies (13 per cent) were mixed companies with both state and private capital and one company was described as being entirely state-owned.

A total of 12 companies (80 per cent) in the sample were either partly or entirely foreign-owned, while the remaining three were Algerian companies. All of the Algerian companies were private companies.

Almost half of the companies were described as either micro-enterprises with fewer than ten employees (20 per cent) or small companies with between ten and 49 employees (27 per cent). The largest group of companies was multinationals with more than 250 employees and offices in multiple countries, accounting for a third of responses.

Almost all of the survey respondents (14/15 or 93 per cent) represented companies headquartered in Algiers. A 15th company was based in Annaba in north-eastern Algeria near to the border with Tunisia. A respondent representing a company based in Oran also replied to the questionnaire, however, this was the participant who was filtered out at question seven since English is not used in his or her workplace.

The full results of the survey are presented below:

1. You are...		
A CEO	9	60%
A HR professional	1	7%
Other executive role	5	33%

2. Your company is...		
A state-owned company	1	7%
A privately-owned company	12	80%
A mixed company with state and private capital	2	13%

3. Your company is...		
Entirely Algerian-owned	3	20%
Partly or entirely foreign-owned	12	80%

4. Your company is a...		
A micro-enterprise (fewer than 10 employees)	3	20%
A small company (10–49 employees)	4	27%
A medium-sized company (50–249 employees)	2	13%
A large company (more than 250 employees)	1	7%
A multinational company (more than 250 employees with offices in multiple countries)	5	33%

5. What industry does your company work in? (please specify)		
Services	7	47%
Tourism	1	7%
Pharmaceuticals	1	7%
Other	1	7%
Oil & gas / Energy	4	27%
Banking	1	7%

6. Please state the wilaya of your company's head office in Algeria		
Algiers	14	88%
Annaba	1	6%

7. Do any staff at your company in Algeria use either SPOKEN or WRITTEN English, even rarely?		
Yes	15	
No	(1)	

8. Which of your staff, including local staff and expats, currently use either written or spoken English in your workplace?		
Everybody	7	47%
Mostly senior management	3	20%
Mostly staff in technical roles	2	13%
Other	3	20%

9. How frequently do local staff generally use written or spoken English in the workplace?		
Rarely	0	0%
Sometimes	4	27%
Often	7	47%
Always	4	27%

10. Do local staff use spoken English to... (choose as many answers as apply)		
Chat socially with Algerian colleagues?	3	20%
Chat socially with colleagues of other nationalities?	8	53%
Hold work-related conversations with Algerian colleagues?	5	33%
Hold work-related conversations with colleagues of other nationalities?	12	80%
Make calls to suppliers?	9	60%
Make sales calls?	7	47%
None of the above	0	0%

11. With regard to spoken English, is your local staff's level of language skill appropriate for your company's needs?		
Generally it falls well below our needs	3	20%
Generally it falls slightly below our needs	2	13%
It is generally appropriate for our needs	9	60%
Generally it slightly exceeds our needs	1	7%
Generally it far exceeds our needs	0	0%

12. Do local staff use written English to... (choose as many answers as apply)		
Send emails to colleagues?	8	53%
Send emails to management or overseas offices?	11	73%
Send emails to clients?	10	67%
Send emails to suppliers?	9	60%
Produce reports, deliverables or other written content for internal use?	5	33%
Produce marketing materials or other written content for external use?	2	13%
None of the above	1	7%

13. With regard to written English, is your local staff's level of language skill appropriate for your company's needs?		
Generally it falls well below our needs	2	13%
Generally it falls slightly below our needs	6	40%
It is generally appropriate for our needs	6	40%
Generally it slightly exceeds our needs	1	7%
Generally it far exceeds our needs	0	0%

14. Approximately how many job vacancies does your company advertise in Algeria in a typical year that have written English skills as a mandatory requirement	Redacted

15. Approximately how many job vacancies does your company advertise in Algeria in a typical year that have spoken English skills as a mandatory requirement?	Redacted

16. When you advertise roles that require English language skills in Algeria, what level of skill to you generally require? (select all answers that apply)		
Basic	3	20%
Intermediate	6	40%
Advanced	10	67%
Technical	8	53%

17. When it comes to recruiting candidates in Algeria for roles that require an intermediate, advanced or technical level of English language skills, do you find that...		
It takes much less time than recruiting for a similar role where French is required	0	0%
It takes a little less time than recruiting for a similar role where French is required	0	0%
It takes the same amount time than recruiting for a similar role where French is required	1	7%
It takes a little more time than recruiting for a similar role where French is required	5	33%
It takes a lot more time than recruiting for a similar role where French is required	6	40%
This question does not apply to us	3	20%

18. When it comes to recruiting candidates in Algeria for roles that require an intermediate, advanced or technical level of English language skills, do you find that...		
You can offer much lower salaries than for similar roles where French is required	0	0%
You can offer slightly lower salaries than for similar roles where French is required	0	0%
You can offer the same salaries as for similar roles where French is required	6	40%
You must offer slightly higher salaries than for similar roles where French is required	4	27%
You must offer much higher salaries than for similar roles where French is required	2	13%
This question does not apply to us	3	20%

19. Taking into account your company's plans for its future development in Algeria, do you think you will need to recruit...		
Much fewer English speakers in the next 5 years than in the last 5 years	0	0%
Slightly fewer English speakers in the next 5 years than in the last 5 years	0	0%
The same amount of English speakers in the next 5 years than in the last 5 years	3	20%
Slightly more English speakers in the next 5 years than in the last 5 years	7	47%
Many more English speakers in the next 5 years than in the last 5 years	5	33%

20. Do you routinely offer any language training for your local staff in Algeria as part of your continuing professional development programme?		
Yes, for anyone who asks for it	6	40%
Yes, but only for specific job roles	4	27%
No	5	33%

21. If you do offer language training for your local staff in Algeria, which languages do you currently offer? (select all answers that apply)		
French	2	13%
German	0	0%
Arabic	0	0%
English	10	67%
Spanish	1	7%
Turkish	0	0%
Mandarin Chinese	0	0%
Other	1	7%
We do not offer language training to our staff	5	33%

22. If you do offer English language training for your local staff in Algeria, is the level of teaching provided of an appropriate standard for your needs?		
No, the level of teaching does not meet our needs	4	27%
Yes, the level of teaching does meet our needs	7	47%
We do not offer English language training to our staff	4	27%

23. Is there anything else that you would like to tell us about the use of English in the workplace or the challenges you face recruiting English-speaking staff in Algeria?
It is all difficult!
As an international company, we should focus on developing the ability of our staff to communicate in English. It should be mandatory even if not mentioned as a requirement before joining.
N.A
Translating from French to English is required to inform the management on a daily basis. Skilled people that understand the oil and gas industry is important is that endeavour.
Accuracy of minutes and governance packs are required in English and for these formal documents there is a challenge to get the same quality as seen elsewhere in our Group. This is understanding given it is many people's third language, so often it is acceptable as long as the key messages are conveyed.
No

24. Is there anything else that you would like to tell us about English language teaching in Algeria in general?
Organisations (Schools, institutions..) should invest more on their English teachers by providing them frequent training, monitoring
It should be cost effective and available online
No
conducted by single teacher/consultant, not through company due to little choice

25. If you would be happy to be contacted to discuss your answers in more detail, please leave your name and phone number below
Redacted

Notes

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