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The Language Training Market In Czech Republic

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THE LANGUAGE TRAINING MARKET IN THE CZECH REPUBLIC

EXECUTIVE SUMMARY

The Czech Republic is a stable, democratic state, with an open economy, significant levels of foreign trade and per-capita foreign investment that is among the world's highest. Most of the foreign investment entering the country comes from neighboring Germany, which is its most important business partner. The Czech Republic is a member of the European Union, the OECD and NATO.

Keen interest in the acquisition of foreign languages exists in the Czech Republic. Up until the "Velvet Revolution" occurred in 1989, Russian was the main foreign language taught in Czech schools. Since 1989, however, English has overtaken Russian as the predominant foreign language taught, and is now introduced in the fourth grade of primary school. Learning English is regarded as very important for career advancement as many Czech companies require English proficiency from their rank-and-file employees and fluency from their managers.

Managers in Czech companies are also expected to have some knowledge of another foreign language, usually German, even though many German companies prefer to conduct business in English. In German banking institutions, for example, English is the standard working language. Although English is by far the most popular foreign language within the Czech general population, its use is not widespread among those over the age of 40, whereas those under the age of 40 are more apt to speak it.

The significance of German and French is declining in the face of the rising popularity of English, which is considered a world language by the Czechs. French tends to be spoken more within the public sector as opposed to the private sector.

The Czech language-training market is very liberal, yet fragmented, comprising relatively large language schools (both Czech and international) in along with many smaller entities which charge less but which offer lower quality training.

The importance of European language standards has increased in the Czech Republic since it joined the EU. For example, the Common European Framework of Reference (CEFR) for Languages is among the standards used to compare individual examinations. More importance is also being placed on internationally recognized language examinations.

Since 1990, Canada and the Czech Republic have enjoyed a mutually beneficial relationship, co-operating on more than 270 projects funded by the Canadian

International Development Agency (CIDA). These projects, worth close to \$27 million,¹ have focused on good governance, private-sector development, financial sector reform, and education. Co-operation between the two countries continues through the Official Development Assistance in Central Europe (ODACE), which oversees joint projects shared by Canada and the Czech Republic in third-world countries.

Canada supports major Canadian Studies programs in universities in Prague and Brno. The Canadian Studies Centre at Brno's Masaryk University has co-ordinated Canadian Studies programs throughout the Central European region.

The perception of Anglo-Saxon countries in the Czech Republic is generally positive, particularly among younger Czechs. Canada is viewed somewhat more favorably than the United States, perhaps due to the Czech Republic's experiences with superpowers such as the former Soviet Union.

Given the large number of Czech-based corporations operating throughout Central and Eastern Europe, the Czech Republic could be considered a gateway to these markets.

The private language-training market in the Czech Republic is still emerging, hence the Czech Statistical Office has not yet compiled or published relevant data. Indeed, the Czech Republic Association of Language Schools and the individual language schools themselves must resort to the incomplete statistics published in Stanford's *Book of Lists* to evaluate the market. There is little in the way of state supervision or intervention in the area of private language schools or in any businesses affiliated with language training. This might explain the absence of published data.

The information presented in this report is derived from secondary sources as well as primary research conducted by the Czech research firm, GfK Praha, based on interviews with representatives from leading private language schools operating in the Czech Republic.

¹ All monetary amounts are expressed in Canadian dollars, unless otherwise indicated. Currency conversion is based on Bank of Canada rates.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
MARKET OVERVIEW.....	6
Background.....	6
Czech Internet Usage	8
Czech Education System.....	9
<i>Primary</i>	9
<i>Secondary</i>	10
<i>Tertiary</i>	10
KEY FACTORS SHAPING MARKET GROWTH	11
Language Skills.....	11
European Language Standards	12
Language Certification	13
National Plan for Foreign Language Teaching.....	15
EU Education Programs	17
European Social Fund	18
OPPORTUNITIES.....	18
COMPETITIVE ENVIRONMENT	22
Czech Association of Language Schools.....	23
Lesson Fees	24
Translation Services	24
PRIVATE-SECTOR CUSTOMERS	25
PUBLIC-SECTOR CUSTOMERS.....	27
MARKET LOGISTICS.....	28
Promotion.....	28
Suggested Business Practices	28
Local Standards, Certificates or Regulations.....	29
PROMOTIONAL EVENTS	30
KEY CONTACTS	31
APPENDIX.....	34
BIBLIOGRAPHY	36
OTHER REFERENCE MATERIAL	37
Useful Internet Sites.....	37

THE LANGUAGE TRAINING MARKET IN THE CZECH REPUBLIC

MARKET OVERVIEW

Background

Bordered by Germany, Austria, Poland and Slovakia, the Czech Republic is strategically located in the centre of Europe. It joined the European Union on May 1, 2004, and also belongs to the OECD and NATO. More than 10 million Czech people inhabit a territory approaching 79 000 km². Some 1.2 million people live in Prague, the nation's capital, which plays a key role in the economic, political, educational and cultural affairs of the country. The level of unemployment in Prague is very low.

The Czech economy is very open, export-oriented and liberal, attracting a high proportion of foreign investment. This is largely due to its very well educated populace, strong industrial tradition, dynamic economic development, EU membership and its strategic geographical location. Labour costs remain low relative to other Western countries. In 2006, the Czech GDP grew by an estimated 6%, inflation remained below 3%, and unemployment was estimated at 8%. Over the past few years, the strength of the Czech koruna has been rising, improving significantly against all major world currencies. There has been an on-going discussion about the adoption of the euro, which is slated for 2012.

The Czech Republic is undergoing dynamic changes in an effort to become a strong EU member. The country's continued fast pace of economic growth suggests ample business opportunities for Canadian companies, both now and in the future. Given its strategic location in the centre of Europe, the Czech Republic could also become the gateway to the emerging economies in Central and Eastern Europe.

In the Czech Republic, in particular Prague, a large community of expatriates from developed Western countries has formed, most of whom hold managerial positions. The Czech Republic is also a popular destination for teachers of English from the United States and from Canada. While the pay scales at Czech schools still lag those in other developed countries, this tends to be offset by the lower prices of some goods and services.

Already a centre of attention from Canadian and other foreign investors, the Czech Republic offers major potential for Canadian companies interested in penetrating the markets of the European Union or the markets of Eastern and Central Europe. Some 50 Canadian firms have already invested more than \$1 billion in the country, and many more are involved locally through Czech distributors and vendors.

In both the public and private sectors, the main language of communication is Czech. Knowledge of English is relatively extensive, especially among the younger generation and among managers in the financial services and high-tech sectors. Indeed, the popularity of English is increasing as Czechs realize its global importance. German is commonly used in technical sectors and in tourism, especially in regions bordering Austria and Germany. French is less widespread, and tends to be used more in the public rather than the private sector.

Languages are taught as part of the national education system and can also be learned in private language schools. Legislation governing the establishment of language schools is very liberal, i.e. there are no obstacles for foreign business entities. Given the focus on the Russian language in the Czech Republic prior to 1989, the acquisition of other foreign languages has lagged. Now, however, in this small, very open, export-oriented economy with its large share of foreign investment, demand for foreign language training has risen dramatically.

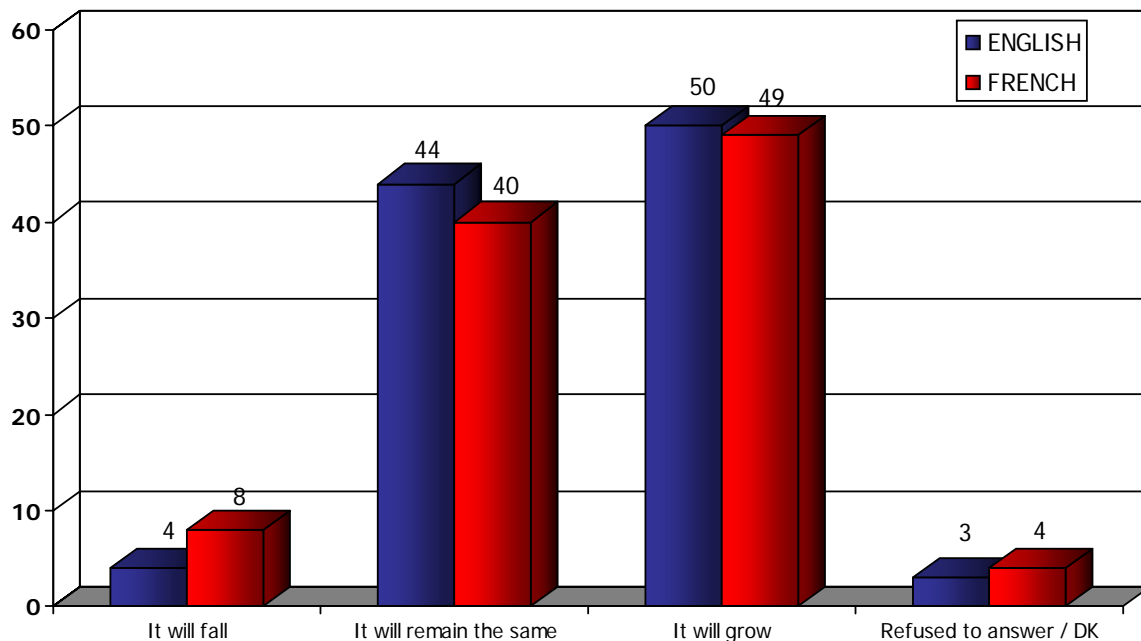
The predominant foreign language taught at Czech schools is English. The population of students learning English comprises 138 000 secondary students and 493 000 primary students. At the secondary school level, German is studied by 85 000 students, French is studied by 26 500 students, 8000 students study Spanish and 5000 study Russian. At the primary level, some 1000 students are taught Spanish and 4000 students are taught Russian. English is taught at 97% of all language schools, German at 88% of language schools, followed by French (83%), Slovakian (76%), Spanish (74%), Russian (68%), Italian (60%), Arabic (24%), Japanese (23%), Chinese (22%) and Swedish (21%).

The Czech language training market is fragmented and fiercely competitive, comprising an abundance of domestic and foreign language schools. Organizations such as the British Council, City & Guilds, and the French Institute are active in the market.

The largest market segment for language services is people between 20 and 45 years of age, primarily individuals who have graduated from secondary school and are either university graduates or university students.

In general, the current preferences for learning English and French are not expected to change significantly in the short-term. Industry analysts are split evenly between predictions that these markets will either grow or will remain the same.

Graph – The anticipated development of English and French learning preferences of language school clients, in % (GfK's quantitative research)



Czech Internet Usage

The number of Czech households with a PC and an Internet connection surged between 2003 and 2006. Some 36% of the Czech households now own a PC (about 1.5 million), while 27% of households have an Internet connection (about 1.12 million), of which 636 000 are broadband. Households with children are more likely to be Internet-enabled than those without. The use of broadband has risen sharply in the past year.

Some 56% of the population over the age of 16 (4.85 million individuals) has used a PC at one time, while 48% of the population in this age group (4.14 million individuals) have used a PC within a three-month period. The number of regular PC users climbed steeply between 2003 and 2006; 86% of the PC user population uses a PC at least once a week. Computers are more often used by Czech men than Czech women; young people between the ages of 16 and 24 (84% of this group) use them more than seniors. Not surprisingly, so do individuals with a higher education (83% of that group).

The number of Internet users climbed significantly between 2003 and 2006. Some 47% of the Czech population (4.07 million individuals) aged 16 or over have used the Internet at some stage in their lives; 41% of the population in this group (3.54 million individuals) have used the Internet within a three-month period; and 81% of Internet users access the Internet at least once a week. The Internet is most often used by people between the ages of 16 and 24 (78% of that group) and by individuals with higher education (78% of that group). Seniors use the Internet less often.

Communication e.g. e-mail is the most commonly cited reason for using the Internet. Some 72% of Internet users searched for information about goods and services in a three-month period, 50% searched for services related to travel and accommodation, and 43% used the Internet for browsing and to download newspapers and magazines. An estimated 59% of Czech students use the Internet for schoolwork i.e., to access information connected with their studies.

In 2005, almost all of the primary schools in the Czech Republic (level one) were equipped with computers, of which 98% had an Internet connection, half of which were broadband. At secondary schools and post-secondary vocational colleges, the share of PCs with broadband connections approaches 90%.

Three quarters of Czech schools maintain their own Web site, 84% offer e-mailboxes to teachers and 45% offer e-mailboxes to students. A LAN is used in 81% of all schools in the Czech Republic, which is above the EU-25 average of approximately 55%. An Intranet is operated by 38.3% of Czech schools, which is about the average for the EU.

The Internet and various forms of Web applications used as sources of information are now the Alpha and Omega of university studies. Over 92% of students at public universities in the Czech Republic regularly use the Internet for their studies; at private institutions 96% of students do.

Czech Education System

The mandate of the Czech Ministry of Education, Youth and Sports is the education of children and youth; nurseries and pre-school education, primary and secondary schools, colleges and universities, and associated educational programs, all fall within the Ministry's mandate. Current and future educational reforms to be undertaken by the Ministry are being conceived and implemented in co-operation with EU institutions aimed at unifying educational systems within the EU. The Framework Programs currently deployed in Czech primary schools that define the content and form of primary school education embody this goal. Language education (primarily English) for all, starting at a very young age, is among the reforms being introduced into public education. The EU is also aiming to unify colleges and universities in its member states to allow European students to study for specified periods at comparable faculties in foreign universities—provided these students master the language of instruction.

In the Czech Republic, both public and private schools are supervised by the Ministry of Education, Youth and Sports. The structure and curriculum for schools in both systems is therefore similar, although teaching styles may differ. Funding is also different for each. While public schools are mostly financed from the state budget or other public sources, e.g. the EU, private schools rely on private resources, including tuition fees.

Primary

In the Czech Republic, primary education is universally accessible and children start school at the age of six or seven. During the first five primary grades, attendance is

almost 100%. In the Czech Republic, children between the ages of 7 to 15 years are required to attend school, which corresponds to nine grades of primary schooling.

Secondary

The proportion of teenagers attending secondary school is very high: during the 2004-05 school year, some 92.4% of all teens between the ages of 15 and 18 attended high school. The figure rises to 96.5 % when students attending vocational schools are factored in.

Tertiary

Non-degree-granting (NDG) Vocational Schools

In 2004, programs were offered by 175 non-degree-granting (NDG) vocational schools in the Czech Republic. Most of these NDG schools have relationships with vocational schools at the secondary school level. Although the courses offered are similar in length and quality to college and university bachelor's degree courses, NDG vocational schools differ from these institutions in several ways. These schools may be subject to state-regulated tuition fees even though university degrees are not awarded and they often provide courses strongly focused on practical applications i.e., in subjects not covered by colleges or universities. NDG vocational school graduates are prepared for real-life applications via practical training that has been integrated into the curricula. They are also relatively well-trained in a foreign language, including the terminology used in their field of study. Foreign language testing is also part of the school leaving exam.

University and College Education

During the 2004-05 school year, some 25 public universities and colleges comprising 117 faculties delivered educational programs in the Czech Republic, including two state-run universities, the Defence University in Brno and the Police Academy of the Czech Republic in Prague. A new element has been added to the Czech education system: as of January 2006, some 39 state authorizations to operate private universities or colleges were issued. Although the number of students attending university and college in the Czech Republic has more than doubled since 1990, the demand for university education by secondary school graduates is still not fully satisfied.

On-the-job Training

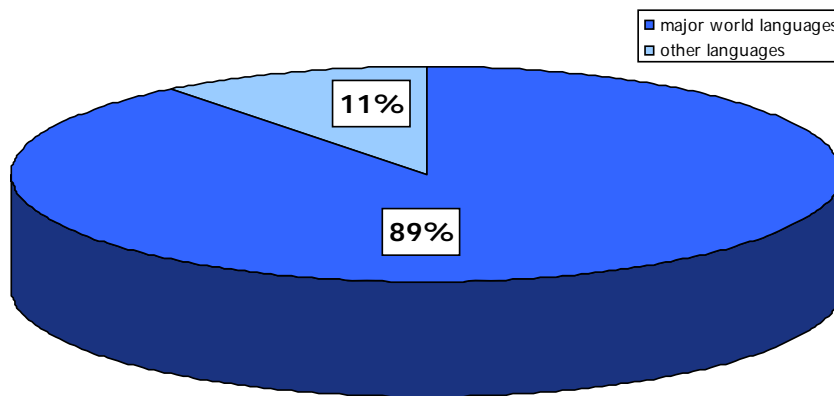
On-the-job training is often provided by employers. Typically larger corporations, rather than small to mid-sized companies, and foreign, rather than domestic, companies tend to offer such training. Companies from more recent EU members such as Slovakia, Slovenia, Estonia, tend to have better records for employee training than Czech companies.

KEY FACTORS SHAPING MARKET GROWTH

Language Skills

English, German, French, Spanish, Russian are considered the major world languages, and as such comprise 89% of all language school lessons offered in the country.

Graph – The share of major world languages (English, German, French, Spanish, Russian) taught at language schools from the aspect of the number of lessons (quantitative research by GfK Praha)



Despite the emphasis on learning English in the Czech Republic, English language skills among Czechs are less developed than among people from other EU member countries. The acquisition of other foreign languages is no better among Czechs, largely due to an insufficient number of experienced language teachers and to outmoded teaching methods.

Efforts are underway to reduce the authoritative nature of conventional language education by placing students, rather than teachers, at the centre of a teaching process. This process involves exercising all language skills and encouraging language learning to take place in the context of real-life situations, with the teacher as a “facilitator” rather than an authoritative figure. The Internet and audiovisual technology are now used more in teaching, which presents students with greater opportunities to experiment with new teaching aids and procedures. This shift from traditional techniques has already occurred in most other Western countries.

Research conducted by Eurobarometer has revealed that countries with small populations whose languages are not considered among the key world languages achieve the best foreign language proficiency.

For example, in addition to their native tongues, some 99% Luxembourg’s citizens, 93% of Maltese and Latvians, 91% of Dutch citizens and 69% of Slovaks can speak a

second language. By contrast, only 60% of Czech citizens and 29% of Hungarians can speak a second language. Czechs are most likely to speak German (31%), followed by English (24%) and Russian (19%). Females are more likely to excel at foreign language learning (i.e., 52% of females versus 47% of males), and urban citizens are more likely to learn a foreign language than those living in rural areas (55% of urban dwellers versus 47% in rural areas). Youth between the ages of 15-24 years of age are more likely to learn a second language (69%) as opposed to 35% of those over 55 years of age.

European Language Standards

The Council of Europe has developed language standards and a European Language Portfolio (ELP) as part of the European Framework of Reference for Languages (EFR), created to evaluate the language skills of EU students. Teaching methods and curricula are now organized with a view to possible integration into the Common European Framework of Reference (CEFR) for Languages; evaluation is based on the ALTE (Association of Language Testers in Europe) international system.

The Czech Ministry of Education, Youth and Sport supports the ELP and will gradually implement it into all schools and public language institutions.

A modern, user-friendly learning tool, the ELP yields many benefits to students of foreign languages: it increases their motivation to study, it highlights the differences between various language competencies, and it helps students set and achieve their learning goals.

ELP comprises the following main components:

- A personalized language portfolio in which students keep records of their language skills, store their work-in-progress and their certificates;
- A language “CV” structured according to European standards which describes the user’s language competency; and,
- A EU language “passport” which may be used to document the user’s language skills in EU countries.

To date, around 40% of the language schools in the Czech Republic base the content and delivery of their language courses on the principles outlined in the Common European Framework of Reference (CEFR) for Languages. These schools are growing in number, and almost half are located in Prague.

Six English language levels defined according to the Common European Framework of Reference (CEFR) for Languages are described below. These are based on the classic definitions of basic, intermediate, and advanced language skills.

A: Basic

- A1: Breakthrough

- A2: Waystage

B: Independent

- B1: Threshold
- B2: Vantage

C: Experienced

- C1 – Effective Operational Proficiency
- C2 – Mastery

Breaking down language proficiency thus makes it easier for the general public to understand the language education system and facilitates lesson planning i.e., the design of teaching units, syllabi, curricula, and learning themes in accordance with student skills.

Language Certification

Preparing students to obtain international language certificates is occupying more of the teaching curricula at Czech language schools. Both domestic and international companies typically require their rank-and-file employees to speak English, and they expect managers to be fluent. For such companies, an internationally recognized certificate assures them that an employee has high-quality language skills.

The following are the most sought-after language certificates in the Czech Republic.

English

Cambridge ESOL (English for Speakers of Other Languages) Examinations: First Certificate in English (FCE), the most popular examination (offered by 78% of language schools) in the Czech Republic, corresponding to CEFR for Language level B2; Preliminary English Test (PET) not on graph; Certificate in Advanced English (CAE), offered by 40% of language schools; Business English Certificate (BEC), offered by 24% of language schools; KET spell out; Certificate of Proficiency in English (CPE) offered by 10% of language schools.

The BEC is designed for anyone obliged to speak English in the workplace. With the advent of trade globalization, many multinational corporations now require their employees to expand their professional portfolios and improve their formal communication skills by becoming BEC-certified. To that end, hundreds of employers now use the BEC tests as part of employee training programs and job screening, which translates into more than 60 000 people from over 50 countries sitting for the BEC examinations each year. Another trend is the merging of linguistic learning with knowledge in a specific field.

The TOEFL examinations, which are widely used in the Czech Republic, are offered in several test centres in Prague and Ostrava. New test centres (e.g. in Brno) are slated to

open soon. Most TOEFL candidates plan to study abroad at universities where instruction is in English. TOEFL is also used by many certification organizations, grant agencies etc. to assess English proficiency in applicants.

TOEIC tests are similar to TOEFL, but focus on the business and management sector rather than the academic sector.

Developed in Australia, the IELTS is an international examination system recognized by most universities in the United Kingdom, Australia, New Zealand, Canada and the United States. IELTS certification, which is valid for one year, is often an entry requirement for study abroad programs. IELTS exams are organized by the British Council in co-operation with the University of Cambridge ESOL Examinations and IDP Education Australia. Students can register for IELTS exams at the Prague branch of the British Council.

TELC certificates, which mirror the European Framework of Reference for Languages (CEFR), are issued by the German institution WBT (Weiterbildungs-Testsysteme, Frankfurt am Main). These examinations, which can be set in many languages, are becoming more popular than the State Language Examinations (Státní jazykové zkoušky). The state English exam is taken by 14% of students.

City & Guilds Pitman Qualifications, a British language training company, has been operating in the Czech Republic since the early 1990s through its expanding network of accredited centres. The company's exams, which have been endorsed by the Czech Ministry of Education, Youth and Sport, include business English (e.g. English for Business Communication and Spoken Test for Business). Established in 1878, the non-profit chartered school City & Guilds of London Institute is one of the most important UK institutions specializing in vocational training. The company issues more than one million certificates annually, covering a multitude of professional fields. The school operates 9000 accredited centres, including universities, colleges and other educational institutions.

Table 1. Comparison of English Language Test Levels

CEFR for Languages	City & Guilds	British Council
A1	Preliminary	No test equivalent
A2	Access	KET
B1	Achiever	PET
B2	Communicator	FCE
C1	Expert	CAE
C2	Mastery	CPE

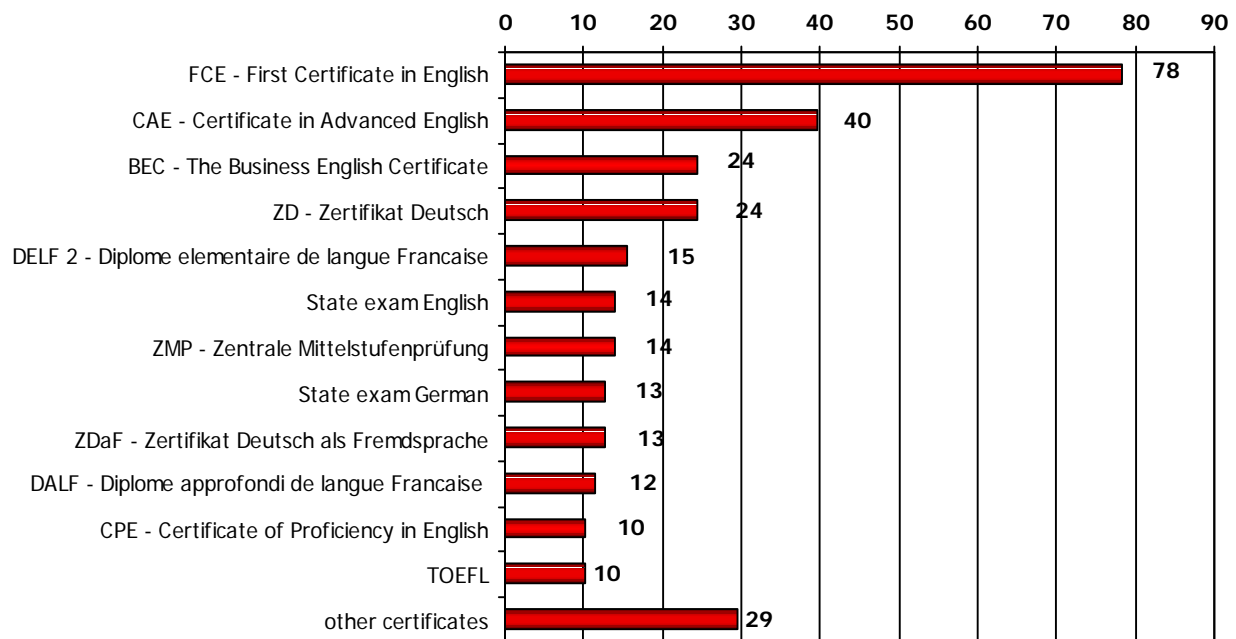
German

The following German language examinations are organized by the Goethe Institute: Zertifikat Deutsch (ZD), offered by 24% of language schools, Zentrale Mittelstufenprüfung (ZMP), offered by 14% of language schools, Zertifikat Deutsch als Fremdsprache (ZDaF), offered by 13% of language schools, and the state German exam, offered by 13% of language schools.

French

French language examinations are organized by the French Institute: Diplôme élémentaire en Langue Française (DEL F B1 and B2), is offered by 15% of language schools, Diplôme Approfondi de Langue Française (DALF), is offered by 12% of language schools.

Graph - The most popular language examinations and certificates and the preparation for them, taken by students, in % (quantitative survey by GfK)



National Plan for Foreign Language Teaching

The Czech school system has had a long history of language education; its proven methodologies have now been harmonized with EU education policies, including those of the Council of Europe. Through seminars and conferences offered by the European Centre for Modern Languages, for example, Czech professionals have been acquainted with the influence Czech pedagogical experts have had in designing many of the Council of Europe's projects.

The National Plan for Foreign Language Teaching supports the improvement of foreign language proficiency, including comprehension and verbal communication, among Czech citizens. Throughout the mandate of the Action Plan 2005–2008, more qualified language teachers will be hired, the latest pedagogical techniques will be explored, and high-quality teaching material in both paper and multimedia format will be created and disseminated. The widespread use of information and communication technologies

(ICT) will be promoted to facilitate e-learning, and subsidies will be available to enable identified groups of Czech citizens to obtain foreign language instruction. An oversight commission will be assigned to ensure the appropriate use of funds.

Several education frameworks have already been proposed aimed at making every European citizen tri-lingual i.e., able to communicate in their native language plus two others. The Framework Educational Program for Pre-school Education and the Framework Educational Program for Primary Education have already been approved, and as a result, all students in primary schools will be taught English. The initial English language teaching will focus on integrating English language education seamlessly from kindergarten through secondary school. In accordance with the CEFR for Languages, A1 has been designated the mandatory skill level to be achieved by the end of grade five, A2 by the end of grade nine and B2 by the end of secondary school. The objective of the Action Plan is to create a language learning environment that will prepare EU citizens to communicate with each other easily.

Second languages will be chosen from among the various languages spoken in EU member countries (e.g. French, Russian, Italian and Spanish). In the case of the Czech Republic, given its geographic location, the second languages will likely be German or Polish. The Slovakian language occupies a special place given its historical connection with the Czech language in a formerly united and bilingual state. Slovakian is so similar to Czech that it can be mastered using the “teach-other-primary-school-content-in-second-language” method, and does not have to be taught as another foreign language.

The National Plan is predicated on obtaining the services of a sufficient number of high-quality foreign-language teachers. Scholarships to take courses abroad will be offered to teachers as will opportunities to obtain on-the-job training in their respective fields, all in accordance with the newly prepared “Framework Plan of a System of Foreign Language Education Courses for Teachers.”

Foreign language education in kindergartens is not compulsory hence language propaedeutics will be introduced for pre-school children instead. Kindergarten language learning may therefore smoothly transition into grade one primary school language education which will utilize the “teach-other-primary-school-content-in-the-second-language” method. From grade three onwards, foreign language learning is compulsory. As part of the new approach, the frequency of foreign language lessons will increase throughout all relevant primary school grades. Primary school language education will serve as a basis for secondary schools where the frequency of foreign language lessons will also increase in certain school types.

CLIL (Content and Language Integrated Learning) will be introduced to help students improve their language skills while learning other subject material. CLIL-type teaching and its accessibility depends on the availability of teachers qualified in both content and a foreign language. In the long-term, CLIL-qualified teachers will require specialized training at colleges and universities.

As mentioned, the European Language Portfolio (ELP) concept will help students plan and meet their language objectives. In the Czech Republic, the Portfolios have been prepared for all age categories.

The National Language Portal is a national on-line system that will allow all Czech citizens to take advantage of e-language learning. Courses will be available for a variety of languages at different skill levels, as defined by the CEFR for Languages, either at no cost or via subsidies in the form of vouchers.

In the short-term, primary schools will provide their students with one extra language lesson each week. Czech children are apparently more interested in learning English than German, French or Russian. Unfortunately, a shortage of teachers could hinder this initiative as most potential teachers who have mastered a language and have graduated from a college or university are not eager to teach primary school.

EU Education Programs

The unified EU education system offers a range of benefits to stakeholders, e.g., students, teachers and schools can obtain grants, funded by the EU budget, to engage in co-operative education ventures in non-EU countries. The EU strongly supports foreign scholarships for EU students.

“Socrates” and “Leonardo” are typical of the EU-sponsored education programs that are designed to improve proficiency in any of the official languages used by EU member countries. Socrates is a general program aimed at all skill levels, including continuing education. Integrated into Socrates is the Lingua program, which supports full spectrum language learning through its language centres and its two main activities, language learning support and learning tools development. Lingua leverages input from a wide range of organizations, including public- and private-sector educational institutions. The program is open to NGOs, television, Web-based and other broadcast media companies, publishing houses and software designers.

By contrast, the Leonardo program is geared towards professional education, incorporating vocational and social aspects as well. The Youth program aims to strengthen co-operation among Europe’s youth.

The European Lifelong Learning Programme (LLP) was recently introduced in 2007 to augment the original Leonardo and Socrates programs. The LLP is a co-operative venture aimed at devising innovative ways to promote language learning using information technology and incorporating the results into continuing education. Projects currently being implemented under the former programs will be merged into the new LLP.

The Lifelong Learning Programme offers programming for four distinct age groups:

- Comenius: preschool through secondary school;
- Erasmus: university education;

- Leonardo: vocational education and work placement; and,
- Gruntvig: adult education.

In addition to implementing the LLP, the National Agency of European Study Programs is currently offering the following programs: Erasmus-Mundus, Tempus, EEA Financial Mechanisms/Norway, e-Learning programs, including the e-Twinning program.

European Social Fund

One of four structural EU funds, the European Social Fund (ESF) is a key financial tool for implementing the European Employment Strategy. The ESF was established to reduce unemployment, support social networks and promote equal opportunities in the labour and human resources markets. Between 2004 and 2006, funding worth \$660 million was available to the Czech Republic from the ESF. The agency responsible for the administration of the ESF program in the Czech Republic is the Ministry of Labour and Social Affairs, supported by other partners such as the Ministry of Education, Youth and Sport, the Ministry for Regional Development, the Ministry of Environment, the Ministry of Industry and Trade, CzechInvest, the Foundation for the Development of Civic Society, Prague City Municipal Council, Labour Offices, and local and regional authorities.

The following programs were eligible to tap into the ESF between 2004 and 2006:

- Human Resources Development Operational Programme (HRD OP);
- Single Programming Document for Objective 3 for Prague (SPD 3);
- Program Initiatives of the EQUAL Association; and,
- Joint Regional Operational Program (JROP).

Any organization that operates in accordance with Czech law and any Czech citizen who submits an acceptable proposal can apply for financial assistance from the ESF.

The Ministry of Labour and Social Affairs publishes calls for proposals in the media and on this Web site <http://www.esfcr.cz/clanek.php?lg=1&id=1> . Proposals must be submitted in both paper and electronic formats.

OPPORTUNITIES

Since joining the EU in 2004, the Czech Republic has begun dismantling both trade and non-trade barriers, thus opening up a market of half a billion consumers. As a result, the interest in studying languages, especially English, has grown considerably. Among Czech language schools, the perception of future business opportunities appears optimistic: 90% predict that business prospects will be somewhat or very good.

Given the highly competitive environment, language schools must increase their appeal to consumers through product differentiation and branding, while emphasizing high-quality learning at lower cost. For example, 70% of language schools in Prague now

offer on-line courses to satisfy the desire by clients to save time and money and to increase the intensity of courses.

Interest in specialized teaching (e.g. business English, specifically in the financial services sector) is increasing as is the popularity of private customized lessons tailored to individual client needs. Classroom instruction still accounts for two thirds of all instruction. At present, just over two thirds of all language courses offered in the country are of a general nature, while the remainder focus on specialized language applications.

At present, there are insufficient language teachers, both foreign and domestic, working in the country. To remedy this situation, Czech language schools, which are familiar with the local market, seek co-operative ventures with prestigious foreign language schools.

Although Czech teachers tend to be more assured teaching grammar than native language speakers, students taking conversational courses prefer native speakers. Where Czech teachers and native English speaking teachers have equal qualifications and skills they can teach both grammar and conversation. At present, two thirds of the instructors teaching in the country are Czech; the remainder are foreign. Conversational courses are preferred over courses that emphasize grammar.

Interest in internationally recognized language certification is rising as well as in the associated preparatory courses. At the same time, interest in language courses ending with a state examination is dwindling as these certificates are not accepted by foreign companies. The various language certificates refer to the standard CEFR for Languages skill levels. Holders of higher level certificates are understandably more valued in the labour market. At present, just over one third of all language courses taught in the Czech Republic are geared towards preparing students to be certified.

The demand for corporate language training is rising faster than that for general language courses, with major companies seeking long-term contracts with suppliers of high-quality language training, i.e. those providing qualified teachers. Language schools promoting their services to corporations are discovering that more clients are demanding clear and measurable objectives i.e., clients are prepared to monitor the school's performance to ensure their investment returns value.

Children begin learning English in nursery school which makes them an important target group for language schools and agencies. Since more parents are enrolling their children in learning situations before they are required to enter the regular school system, language schools now offer their services to children as young as two years old, when accompanied by a parent. In such classes, it is usual for instruction to alternate between Czech teachers and native language speakers. Clarity is important when teaching very young children, hence visual aids such as toys, posters, picture-books and didactic games are used. The lessons are made even more diverse with the use of computer-based teaching programs and songs, games and competitions which incorporate language learning.

More opportunities arise when language teaching is combined with leisure and travel, such as teaching abroad programs i.e., where domestic language schools provide courses in co-operation with foreign language schools. Although living costs are high, England is one of the most popular destinations as Czech clients are attracted by the idea of “pure” English. Ireland is also very popular. In Malta, language courses can be combined with a summer holiday. New Zealand and South Africa are popular because tuition is much lower than in Europe or North America.

Canada is slightly more popular than the United States as a destination for English language study because of the perception of slightly lower living costs. In 2006, Canada and the Czech Republic entered into an agreement on temporary work stays for young people between the ages of 18 and 35 years. The agreement will provide new opportunities of short-term employment to benefit career growth, internships, co-operation programs and working holidays in both countries. Courses which include vacation or “room and board” packages now account for 7% of language school offerings in the Czech Republic. A number of agencies such as the Student Agency, GTS and Alfa Agency facilitate language-related travel for students, e.g. organizing language courses, *au pair* employment.

Given the dearth of domestic publishers willing to invest in the regular release of updates to language publications, there is a growing demand for high-quality, user-tested foreign language textbooks.

Experienced teachers are needed at primary and secondary schools. Most of the teaching positions are at schools in smaller Czech towns; there are fewer teaching positions in Prague.

Professional teachers are preferred. All candidates are required to have a college or university-level degree, preferably in English or in a related field. Additional qualification in teaching English as a foreign language (e.g. RSA TEFL Certificate) is necessary for applicants who are graduates of courses in non-related subjects. Previous experience in teaching English in a classroom setting is greatly welcomed. Priority will be given to applicants who can demonstrate they are highly motivated.

The Academic Information Agency (AIA) helps people who are interested in teaching English in the Czech Republic find teaching positions, mainly at primary and secondary state schools. The AIA cannot offer assistance to those seeking university positions or positions teaching subjects other than English.

Agencies will supply a list of applicants for English teaching positions (including details about teaching experience and contact information) to primary and secondary schools that offer foreign language teaching. Teachers may receive offers from several schools. Most schools will, however, contact more applicants in the first round and then, after receiving more information, will select the person they consider to be the best qualified. Therefore candidates are advised to reply to each of the offers received as soon as possible. The school will then contact the applicant directly to discuss contract details.

Teachers are required to take up their posts for the entire school year, which extends from September 1 to June 30. The Christmas holidays last about 10 days and the Spring holidays in February or March last one week. There are also six individual State holidays during the school year.

A few job openings may also occur during the school year, mainly at the half-term (January / February). Teachers starting to teach during the course of the school year will be expected to stay until the end of the term. There is no possibility to arrange for a short-term teaching position during the school year. It is outside the mandate of the AIA to help teachers obtain positions teaching summer courses. Teachers from abroad are not expected to speak Czech. Most will teach conversational English classes, but at schools lacking a Czech teacher of English, the foreign teacher will also be expected to teach grammar.

Both primary school and secondary school teachers are expected to teach approximately 24 hours per week. Primary school students usually start to learn a foreign language in grade four i.e. at the age of 10, hence most students typically enter secondary school with a basic knowledge of English. Some do not, however, because learning English is not obligatory in primary school. The students are divided into smaller groups according to their level of knowledge.

Foreign teachers receive remuneration according to the same pay scale as Czech teachers: approximately \$663 to \$918 per month before taxes and mandatory medical and social insurance deductions. Teachers will also be provided with the required textbooks. While the salary is sufficient for living in the Czech Republic, it will not be enough, for example, to travel around Western Europe.

Teachers must pay their own travel expenses to and from the Czech Republic. Most schools will, however, provide transportation to their location after the teacher has arrived in the Czech Republic, provided this arrangement is agreed upon in advance. The Czech public transportation system is very good, comprising a wide network of buses and trains connecting almost every town and village.

Arrangements for accommodation, which is generally scarce, will be made by the school. It should either be reasonably priced or free of charge. The housing depends on the local possibilities. It is typically quite simple, suitable mostly for a single person; for example, a small furnished flat, a room with toilet and bath facilities in a dormitory or accommodation with a Czech family. It is impossible to arrange accommodation for the teacher's family in a house. An individual school can usually afford to employ only one teacher from abroad which is why it is very difficult to place two friends or a married couple together at one location.

Schools will help the teacher get acquainted with their new surroundings, and most will offer inexpensive meals in their school canteens.

COMPETITIVE ENVIRONMENT

The Czech language market is highly fragmented, with hundreds of language schools and agencies vying for market share.

Skrivanek, a 100% Czech-owned company founded in 1994, is the largest language services and translation agency operating in the Czech Republic, and among the largest in Central and Eastern Europe. With 133 employees, the firm delivers its services via 51 branches in 19 towns and cities throughout the country, and also serves 140 000 customers in 13 countries.

The Caledonian School is the largest language school (i.e., teaching only) in the Czech Republic. Caledonian School has been serving both public-sector and private-sector language clients throughout the Czech Republic since 1991. The company, which employs 210 foreign and Czech teachers, is based in Prague, where it operates five training centres; it has enrolled more than 7000 students across the country. The school co-operates with more than 230 domestic and foreign companies, and is an approved test centre for TOEIC in the Czech Republic. Caledonian School is a partner with the British International School, Prague. The English school Nessie is part of Caledonian School. Caledonian primarily recruits teachers from the Czech Republic, Canada and the United Kingdom.

The Bell School, a private British language school, launched its Czech operations in 1990 as one of Prague's first private language schools. The sole shareholder is the UK-based non-profit charity organization Bell International. Bell is the only private language school in the Czech Republic to be an accredited test centre for the University of Cambridge ESOL Examinations. It is the first and only language school in the Czech Republic to become a member of EAQUALS, the prestigious international organization of quality language schools. More than 30 000 students from more than 120 countries are currently learning English at Bell language schools throughout the world.

London-based Akcent International House Prague has been operating in the market since 1990 and is now one of the largest private schools in the Czech Republic, with a staff of 120. In 2000, it became a member of the International House World Organization. With more than 122 associate members in more than 42 countries, the IHWO is one of the world's major language school networks. Every year, more than 100 000 students study English and many other languages at IH-affiliated schools.

Operating for 127 years, the Berlitz School of Languages provides courses in 500 language centres in more than 60 countries, including the Czech Republic.

London Institute Praha is one of six language schools affiliated with the London Institute of Technology and English (LITE), which was founded in London in 1993.

Other major players include Glossa, Channel Crossings, Ulrych Language Studio, Amadeus, Elvis Language School, Bohemia Institut, Lingea Centrum, Prague Language

Center, Tutor, Sentia, Threshold Training Associates, St. James Language Center, Polyglot, James Cook Languages, Languages at Work, Cloverleaf, London School of Modern Languages, Rolino and Ars Linguarum.

In 2004, Ars Linguarum entered into an exclusive co-operative agreement with GlobalEnglish, which is a world leader in online English teaching. The company represents GlobalEnglish in the Czech Republic and Slovakia.

Many schools in the Czech Republic continue to function only as intermediaries between clients and freelance teachers. Such schools do not take responsibility for their teachers' qualifications, further professional development, or their pedagogical and language skills. To a great extent, this is possible because language teaching is an unlicensed business activity in the Czech Republic, which means that anyone can freelance as a language teacher. Complaints have arisen about some schools that hire unqualified teachers.

See the **Key Contacts** for a selection of language schools and institutes in the Czech Republic.

Czech Association of Language Schools

The mission of the Czech Association of Language Schools (Asociace jazykových škol České republiky) is to promote the interests of quality language schools and to ensure its members maintain high quality teaching standards, as defined in the Association's "ten commandments". School "size" is determined by the number of lessons taught, including private lessons. Schools that belong to the Association account for 42% of the Czech language market.

A quality school is defined by the Association as follows:

1. Provides accurate and sufficient training.
2. Headquarters, classroom and technical facilities promote good working environments.
3. Employs teachers with appropriate qualifications.
4. Offers introductory skill assessment tests to assign students to suitable classes.
5. Clearly defines study programs, including the syllabus and materials to be used.
6. Issues a final evaluation based on internationally recognized examinations, and issues certifications to graduating students.
7. Publishes fees and fee components.
8. Guarantees professional management and organization of teaching, including logistics, incorporation of feedback from and reporting to corporate clients.
9. Provides references on behalf of students and corporate clients.
10. Resolves complaints and addresses suggestions from students.

High-quality language schools typically belong to the Association, which requires its members to comply with minimum quality requirements as outlined in the Ten Principles

of a Good-quality School presented on the Association's Web site (<http://www.ajscr.cz/desatero>).

Lesson Fees

A typical language lesson last 45 minutes but the duration can vary regionally, and will also depend on the number of students in the class and on language specifics i.e., whether it is a general or a special language course (e.g. medicine, pharmacy, financial services, administration, or sales and marketing).

The better schools tend to charge higher fees. Specialized courses, such as those focusing on technical English, typically cost about 15% more. Prospective students are advised to carefully review the services covered by the fee since entry, mid-term, and final tests, textbooks and other learning resources, and administration services, such as attendance records or reports on language proficiency of employees, may cost extra.

Examples of lesson fees charged by the leading language schools in the Czech Republic are presented in the following table.

Table.2 Sample Language School Fees

School	Fee
British Council	Top-quality English courses for corporate clients, with a focus on general or business/law English: \$102 per lesson regardless of class size. The recommended maximum of students in a group is 12.
Skrivanek	General language fee per lesson is \$20-\$24; specialized courses cost an additional 15%.
Akcent	Standard fees for language courses for corporate clients range between \$28-\$36 per lesson.
Tutor	Average fee per lesson is \$25
Bohemia Institut	Average fee per group lesson (three to six people) is \$24-\$32; costs are higher for specialized courses or for larger groups.
Polyglot	\$20-\$33 per group lesson.
Rolino	\$33 per group lesson (five to six students); learning resources, entry, mid-term and final testing, and course administration are included. Administration services include items such as attendance records.

Translation Services

There are some 42 translation agencies in the Czech Republic, and their combined turnover continues to increase. This is largely due to the rising number of foreign clients and long-term corporate clients and to the ability of these firms to conclude major contracts within short timeframes. Translation rates, however, have not kept pace and as a result translators' salaries are below the EU average.

The translation industry experienced a boom around the time the Czech Republic joined the EU, when thousands of pages of EU legislation required translation. The industry has also benefited from increased foreign investment in the Czech Republic.

Translation services are mostly needed for highly specialized texts; standard texts can usually be translated by clients in-house. English translation is most in demand. The largest Czech translation agency, Skrivanek, also reports an increased interest in Japanese translation, undoubtedly due to Japanese investment in the country.

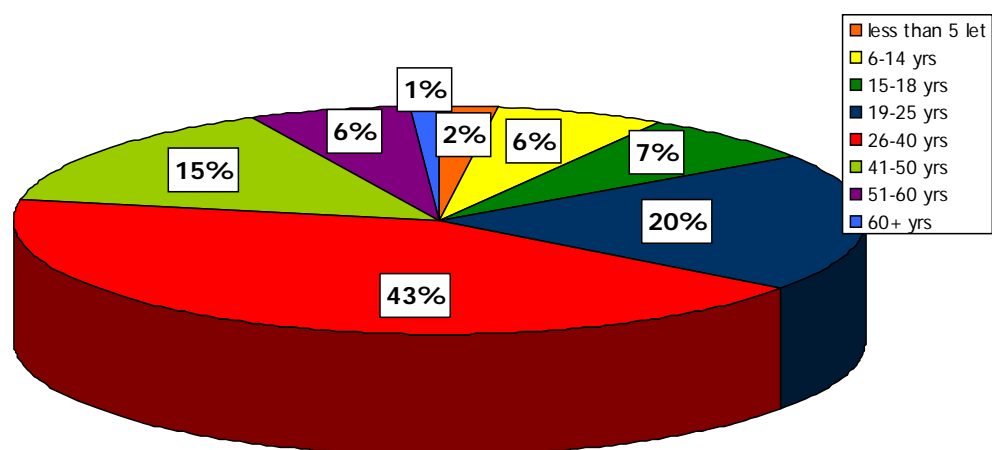
Other major Czech translation agencies include Presto SDL CZ, Artlingua, Agentura SPA, Interlingua, and Moudry preklad.

PRIVATE-SECTOR CUSTOMERS

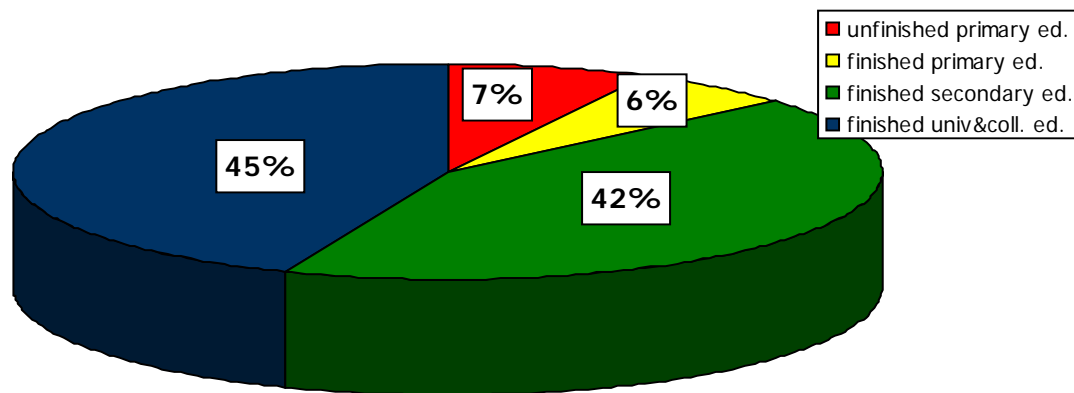
The client structure of the Czech language market has changed fundamentally. In the past, the general public was the key customer group, but following the Czech Republic's admission into the EU, and the ensuing economic growth in the country, the number of corporate customers seeking language services, both language learning and translation, has risen quickly. Corporate clients now account for 44% of all language customers, whereas the general public represents 35% of the customer base. Only 13% of language training customers derive from the public-sector.

The largest group of language students is between 26 and 40 years old (43% of the total), followed by the 19-25 age group (20% of the total) and 15-18 age group (15% of the total). Seniors (aged 50 and older) make up 7% of the total; children between 6-14 years make up 6% of the total, and children less than 5 years old account for 2% of the total. In terms of educational background, 45% of Czech language students are university or college graduates, while 42% have completed high school.

Graph – Age Range of language school students (quantitative research by GfK Praha)



Graph – Education Range of language school students (quantitative research by GfK Praha)



In terms of sectors, the largest groups of language clients derive from the financial services sector (71% use language training), followed by industry (61%), consulting services (50%), and IT (44%). By contrast, 54% of public-sector entities make use language training services.

Companies are increasingly organizing language courses for their staff, both rank-and-file and managers, because the requirement for language proficiency, primarily English, continues to grow. Clients are looking to improve their general communication skills, their business English and their command of the vocabulary used in their specific industry.

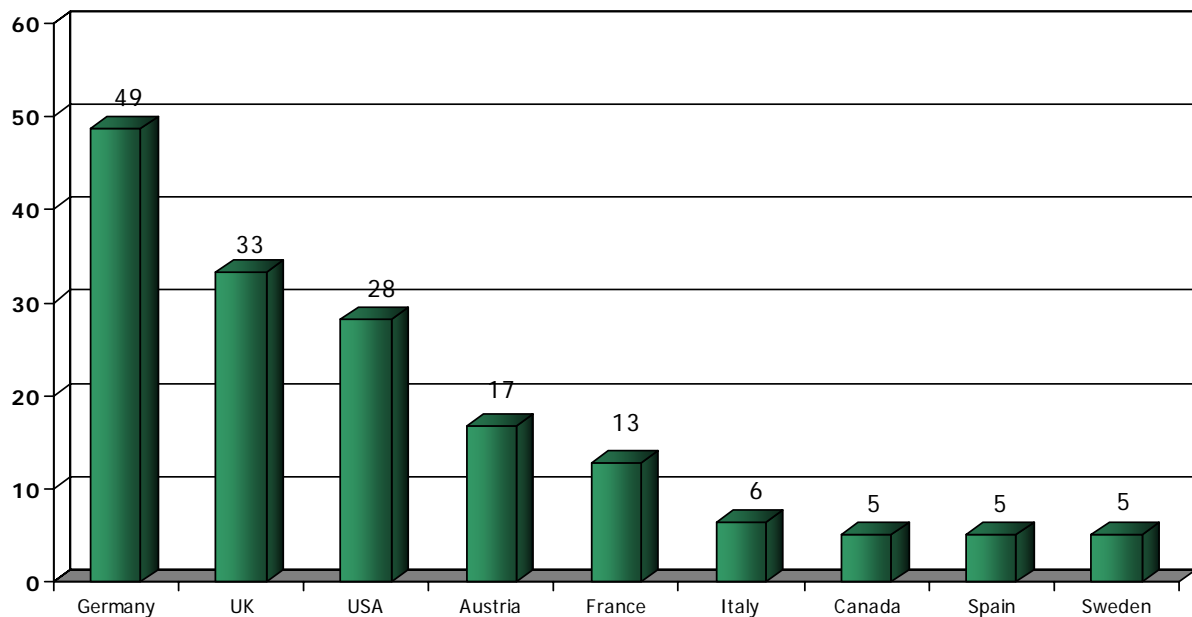
Prior to 1989, Czech schools taught mostly Russian as a foreign language, however, the current competitive business environment has driven up demand for English language skills and, for many positions, knowledge of at least one other foreign language. Older employees are now obliged to improve their language skills to survive under the new economic conditions brought about by the Czech Republic's entry into the EU.

While demand is rising for courses in business and legal English, the demand for German is declining—despite the capital investment by Germany in the Czech Republic.

A number of companies pay for their employees' language education either entirely or in part. Companies may receive EU grants to cover their costs. Training or course costs are also tax deductible, even when the course is organized by a second company. The only condition is that the subject of the training must be related to the employer's business activities. Companies may request that employees continue working for them for a specified period of time after the termination of their language training.

Language schools cite German companies as the most frequent clients for language training services (49% of German companies use language services), followed by UK-based companies (33%), U.S.-based companies (28%), Austrian (17%), French (13%), Italian (6%), Canadian (5%), Spanish (5%) and Swedish (5%).

Graph – The most frequent countries of origin of companies who make use of language school services, in % (quantitative research by GfK; language schools could target more “most frequent countries”; total over 100%)



PUBLIC-SECTOR CUSTOMERS

As a general rule, Czech public administration staff are not yet particularly proficient in foreign languages. EU membership has, however, brought about a sharp increase in the number of public-sector clients who have undertaken language training.

During the second half of 2009, Prague will chair the 27 EU member countries for a six-month term, further motivating language education among Czech public servants. In addition to English, which most of them are already studying, these clients will be required to learn French, the second language in which EU institutions conduct their daily business.

MARKET LOGISTICS

Promotion

Marketing and product positioning are very important, especially for schools specializing in corporate courses. However, there are also a number of other approaches which should be considered. Each language school should spend time deciding on the best way to present their services.

To a large extent, textbook vendors use printed media to advertise, augmented by billboards and broadcast media. The French Institute, for instance, created an advertising spot by itself and booked the production at the radio station of its choice. Tutor Praha books its own advertising space and time. For its outdoor advertising, Skrivanek uses Gratis, an advertising agency. On-line ads are becoming more popular.

School ads have certain limitations in the Czech Republic, in that advertising educational services clashes with the deeply engrained national stereotype that “education is free”. This in turn triggers price-sensitivity among clients and can also limit their perception of differences between schools, i.e., school brand and quality. In an environment where it is increasingly difficult to stand out among the competition, schools emphasize the combination of quality, brand, “user-friendliness” and reasonable cost.

Suggested Business Practices

There is no obligation to penetrate the market via an agent. However, in many cases, Canadian companies entering the Czech market will discover that partnerships with or advice from Czech entities can be very valuable in understanding the local environment (especially in the field of public contracts). The Commercial Code guarantees equal conditions for foreign and domestic investors.

The Association for Foreign Investments (AFI) (<http://www.afi.cz/en>) represents a group of service companies with local experience that facilitates the entry of foreign investors into the Czech Republic, offering them a wide range of professional services.

Consultants from the AFI group are experts in the fields of advisory services, consultancy, project services and inspection, with specializations.

Four thematically focused AFI workshops (Investment Incentives, Industrial Property, Employment and Human Resource Development and Public/Private Partnership) are aimed at streamlining the investment process in the Czech Republic. Assistance comes in the form of targeted suggestions, proposals, or specific solutions leading to improvements in quality of legislation and administrative procedures.

CzechInvest (<http://www.czechinvest.org>), a government organization, has the exclusive responsibility for identifying and supporting investors and negotiating with such investors.

Local Standards, Certificates or Regulations

There are no restrictions limiting foreign ownership of Czech assets. In other words, a company that is fully owned by foreign investors can be established in the country; profits, dividends and capital can be repatriated.

Neither are there barriers to investment from Canada in the Czech Republic. Assistance and advice is available, for example, from the Association for Foreign Investments (<http://www.afi.cz/en>) and from CzechInvest. CzechInvest <http://www.czechinvest.org> has built up a very good reputation: seventh in the world, second in Central Europe. This is the result of a survey of more than a thousand investors, conducted by Ernst & Young in co-operation with CzechInvest.

Foreign citizens seeking any type of employment in the Czech Republic and who are nationals of EU countries can be employed on the same conditions as Czech nationals i.e., they do not need a work permit or a special visa.

Non-EU citizens must obtain a work permit and a Long-Term Visa (visa for a stay over 90 days). These documents must be obtained before arrival in the Czech Republic.

See the **Appendix** for a list of standardized language tests and exams approved by the Ministry of Education, Youth and Sport.

PROMOTIONAL EVENTS

Event / Description	Organizer
<p data-bbox="188 338 464 365">EXPOLINGUA Prague</p> <p data-bbox="188 369 704 457">November 9-10, 2007 Národní dům at Vinohrady, Náměstí Míru 9, 120 53 Prague 2</p> <p data-bbox="188 489 792 699">EXPOLINGUA is an international language, education and culture trade fair aimed at promoting the value of foreign language learning and informing visitors about the cultures and educational systems in other countries. The program includes seminars, workshops, and lectures.</p> <p data-bbox="188 730 721 877">This year's theme is Language Teaching and Mobility. Visitors include students, teachers, interpreters and translators, embassy and consulate employees, as well as the general public.</p>	<p data-bbox="824 338 1435 485">EXPOLINGUA is organized under the auspices of the Ministry of Education, Youth and Sport of the Czech Republic and supported by the European Commission, the General Directorate for Education and Culture.</p> <p data-bbox="824 516 1435 852">Exhibitors include domestic and foreign language schools, universities and colleges, cultural institutions and embassies, education-related publishers, bookshops specializing in foreign languages, computer software companies, companies specializing in on-line language courses and translations, student-exchange organizations, international media and specialty magazines, organizations offering scholarships and language courses abroad, language test providers, and organizations offering au-pair services.</p>

KEY CONTACTS

Canada-Czech Republic Chamber of Commerce

909 Bay St., Suite 1006
 Toronto ON M5S 3G2
 Contact: Lubomír Notný
 Tel./Fax: 416-929-3432
 E-mail: Inovotný@ccrcc.net
 Internet: <http://www.ccrcc.net>

Canadian Chamber of Commerce

Praha City Center
 Klimentůva 46
 110 02 Praha 1
 Czech Republic
 Tel./Fax: 420 225 000 345
 Internet: <http://www.gocanada.cz>

Contact: Peter P. Formanek, President
 Tel.: 420 225 000 509

E-mail: formanek@gocanada.cz
 or

Contact: Alexandra Brabcova, Executive Director
 Tel.: 420 225 000 510

E-mail: brabcova@gocanada.cz

For general inquiries:

E-mail: info@gocanada.cz

For information about upcoming events:

E-mail: events@gocanada.cz

Canadian Embassy in Prague

Muchova 6
 160 00 Prague 6, Czech Republic
 Tel.: 420 27210 1800
 Fax: 420 27210 1890
 E-mail: canada@canada.cz
 Internet: <http://www.canada.cz>

(Office hours:

8:30 AM - 12:30 PM and 1:30 PM - 4:30 PM

Consular Section

Czech Invest

Head Office
 Štěpánská 15
 120 00 Praha 2, Czech Republic
 Tel.: 420 296 342 500
 Fax: 420 296 342 502
 E-mail: info@czechinvest.org
 Internet: <http://www.czechinvest.org>

U.S. Office

Contact: Bohuslav Frelich
 222 Merchandise Mart Plaza
 Suite 938
 IL 60 Chicago
 Tel.: 1 312 245 0180
 Fax: 1 312 245 0183
 E-mail: chicago@czechinvest.org Opening hours to public: 8:30 AM - 12:30 PM)

Foreign Affairs and International Trade Canada (DFAIT)

125 Sussex Dr.
 Ottawa, ON K1A 0G2

Business Sectors Division (BMM)

Contact: Ian Williams, Trade Commissioner,
 Services and Education

Tel.: 613-996-1893

Fax: 613-943-1103

E-mail: ian.williams@international.gc.ca

International Education and Youth Division (PCE)

Contact: Jean-Philippe Tachdjian, Deputy Director
 and Trade Commissioner

Tel.: 613-944-2341

Fax: 613-995-3238

E-mail: jean-philippe.tachdjian@international.gc.ca

Industry Canada (IC)

Service Industries and Consumer Products Branch

Contact: Geneviève McNicoll
 235 Queen St
 Ottawa ON K1A 0H5
 Tel.: 613-948-8011
 Fax: 613-995-3238
 E-mail: mcnicoll.genevieve@ic.gc.ca

Service Industries and Consumer Products Branch

Contact: Morris Krymalowski
 5 Place Ville Marie, 7th Floor
 Montreal, QC H3H 2G2
 Tel.: 514-283-7828
 Fax: 514-283-8916
 E-mail: morris.krymalowski@ic.gc.ca

Language Industry Association (AILIA)

Association de l'industrie de la langue
 283, boul. Alexandre-Taché, office F0240
 C.P. 1250, Hull Station
 Gatineau (Québec) J8X 3X7
 E-mail : communication@ailia.ca

Language Schools and Institutes in the Czech Republic

The Bell School a.s.

Nedvěžská 29
100 00 Praha 10
Czech Republic
Contact: Irena Dominiková, Director
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E-mail: info@bellschool.cz
Internet: <http://www.bellschool.cz>

British Council

Politických vězňů 13
110 00 Praha 1
Czech Republic
Contact: Duncan Lambe,
Director of Teaching Center
Tel.: 420 221 991 162
Fax: 420 224 933 847
E-mail: Duncan.lambe@britishcouncil.cz
E-mail: English.courses@britishcouncil.cz
Internet: <http://www.britishcouncil.cz>

Caledonian School

(P.Y.S., a.s.)
Vltavská 24
150 00 Praha 5
Czech Republic
Contact: Radek Janata, Jan Bébr
Directors
Tel.: 420 257 313 650
Fax: 420 251 512 528
E-mail: info@caledonianschool.com
Internet: <http://www.caledonianschool.cz>

City of Prague Language School

Školská 15
110 00 Praha 1
Czech Republic
Contact: Mgr. Hana Riedlová, Director
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Fax: 420 222 232 236
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Internet: <http://www.sjs.cz>

Charles University

Institute for language and preparatory studies
Vratislavova 10
128 00 Praha 2
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Contact: Mgr. Jan Podroužek, Director
Tel.: 420 224 990 411
Fax: 420 224 990 440
E-mail: Jan.podrouzek@ujop.cuni.cz
E-mail: ujop@ujop.cuni.cz

DZS MSMT

(Academic Information Agency)

Senovazne nam. 26
P.O. Box 8
110 06 Praha 1
Czech Republic
Tel.: 420 224 229 698
Fax: 420 224 229 697
E-mail: aia@dzs.cz

James Cook Languages s.r.o.

Rybná 682/14
110 00 Praha 1
Czech Republic
Contact: Ondřej Kuchař, Jakub Štefeček
Directors
Tel.: 420 221 832 600
Fax: 420 221 832 613
E-mail: kuchar@j-c-l.cz
E-mail: stefeczek@j-c-l.cz
E-mail: jazyky@j-c-l.cz
Internet: <http://www.j-c-l.cz>

Mgr. Pavel Pospíšil - Lingua Centrum

U Stadionu 10
772 00 Olomouc
Czech Republic
Contact: Lenka Hájková, Director
Tel.: 420 585 224 359
Fax: 420 585 221 265
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E-mail: info@lingua-centrum.cz
Internet: <http://www.lingua-centrum.cz>

Language Schools and Institutes in the Czech Republic (continued)

Polyglot, spol.s.r.o.

Mečislavova 8
140 00 Praha 4
Czech Republic
Contact: Ing. Marek Dusil, Director
Tel.: 420 241 742 092
Fax: 420 261 225 851
E-mail: Marek.dusil@polyglot.cz
E-mail: polyglot@polyglot.cz
Internet: <http://www.polyglot.cz>

Slůně – svět jazyků

Kotkova 6
703 00 Ostrava – Vítkovice
Czech Republic
Contact: Ing. Petr Pasek, Director
Tel.: 420 595 957 059
or 420 595 954 104
Fax: 420 595 954 104
E-mail: Petr.pasek@slune.cz
Internet: <http://www.slune.cz>

APPENDIX

Standardized language tests approved by the Ministry of Education, Youth and Sport, Czech Republic (used only for qualification of chosen state administration clerks)

Skill Level	Name of Test
1. (approx.CEFR A1, A2)	KET – Key English Test
	PET – Preliminary English Test
	Certificate in English Stage One Elementary
	English Elementary Level
	BEC 1 – The Business English Certificate 1
	BEC Preliminary - The Business English Certificate Preliminary
	STANAG 6001 – level 1 (exam by the Ministry of Defence, hereinafter only as MO)
	Certification about Basic English Language Skills*
	Secondary school leaving exam – English Language
	TOEFL 400-479
	TOEFL CB 97-156
	Exam of the Ministry of Foreign Affairs (hereinafter only as MZV) – level 2
	Interior Ministry Exam (hereinafter only as MV) – level 1
	JASPEX 200
	City & Guilds Pitman Qualifications ESOL and SPOKEN ESOL Elementary**
	Exam 1 by the Institute of Language and Professional Preparation of Charles University: English Language – Exam ÚJOP UK 1: English Language (hereinafter only as “ÚJOP UK English Language Exam”)
	2. (approx.CEFR B1, B2)
FCE – First Certificate in English	
IELTS 4,5 – 6	
BEC 2 – The Business English Certificate 2	
BEC Vantage – The Business English Certificate Vantage	
STANAG 6001 – level 2 (MO exam)	
ÚJOP UK Exam Level 2: English Language	
English for Europe	
State Language Exam – Basic	
TOEFL 480-549	
TOEFL CB 157-212	
MZV Exam – level 3	
MZV Exam – level 4***	
MV Exam – level 2	
JASPEX 400	
Certificate in English for Business Purposes	
English language exam undertaken as a part of an accredited doctoral degree course (Ph.D., or Th.D.)	
English language exam undertaken as a part of the CSc. degree course (CSc.)	
City & Guilds Pitman Qualifications ESOL and SPOKEN ESOL Intermediate**	
3. (approx. CEFR C1, C2)	
	CAE – Certificate in Advanced English
	CPE – Certificate of Proficiency in English
	BEC 3 – The Business English Certificate 3
	BEC Higher – The Business English Certificate Higher

Skill Level	Name of Test
	CEIBT – Certificate in English for International Business and Trade
	STANAG 6001 – level 3 (MO exam)
	TOEFL 550-677
	TOEFL CB 213-300
	JASPEX Final English Exam
	MZV Exam – level 4****
	MV Exam – level 3
	City & Guilds Pitman Qualifications ESOL and SPOKEN ESOL Higher Intermediate**
	City & Guilds Pitman Qualifications ESOL and SPOKEN ESOL Advanced**
	State Language Exam – general
	State Language Exam – special*****
	Secondary school leaving exam – English language (schools with Content and Language Integrated Learning specialized in English)
	Philosophical or Pedagogical Faculty Major in English

Notes:

* Certificate about basic language proficiency issued by a language school certified to conduct State Language Exams after demonstrating language skills corresponding to a 420-lesson course.

** Oral and written exam; to acknowledge the qualification, it is necessary to present two certificates, one of them for the oral exam (SPOKEN ESOL), and one of them for the written exam (ESOL).

*** Exam conducted prior to September 1, 2005.

**** Exam conducted prior to September 1, 2005.

***** State Language Exam – special level may be conducted for the field of translation and for the field of interpretation (see Article 4, Par 1 of the Regulation 33/2005 Coll., On State Language Schools Approved for State Language Testing and on State Language Testing).

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Canada – BusinessInfo: <http://www.businessinfo.cz/cz/rubrika/kanada/1000849/>

Czech education: http://www.lipa.cz/case_lipa_VII_skolstvi_Steffl.doc

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Czechs speak better German than English:

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Foreign Languages in Czech Schools: <http://www.sochorek.cz/cz/pr/blog/1132173515-cizi-jazyky-na-ceskych-skolach.htm> in Czech only

Industry Canada (commercial education and training): <http://strategis.ic.gc.ca/epic/site/cet-ecf.nsf/en/Home>

Infrastructure in education system: http://www.czso.cz/csu/redakce.nsf/i/ict_infrastruktura_ve_skolstvi

International co-operation in education:

http://www.vse.cz/obecne/vz2005h/vz2005_mezinarodni_spoluprace_vzdelavani.pdf

Language Learning Strategies: http://www.jazyky.com/images/stories/LLS_Forum.pdf

Language learning in kindergarten: http://ihned.cz/3-19905200-jazykov%E9+%9Akoly-000000_d-40
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Language audit – the way for effectivity in language education: <http://www.educity.cz/skoleni-kurzy/article/id/432341> in Czech only

Language Education and European Union: <http://www.rvp.cz/clanek/85/73> in Czech only

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100 Top Language Schools: <http://www.100-top-jazykove-skoly.cz/skoleni-kurzy> in Czech only

Language information in Czech only

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Student Agency: <http://www.studentagency.cz/mainpage.php?switch=310> in Czech only

OTHER REFERENCE MATERIAL

Useful Internet Sites

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Association of Teachers of English of the British Council: <http://www.britishcouncil.org/czechrepublic>

The Bell School a.s.: <http://www.bellschool.cz>

Business Angels Czech: http://www.bacz.cz/www/index.php?sekce=akce_program&id=2 In Czech only

Canadian Association of Private Language Schools: <http://www.capls.com>

Caledonian School: <http://www.caledonianschool.cz>

Charles University, Institute for language and preparatory studies: <http://www.ujop.cuni.cz>

City and Guilds: <http://www.cityandguilds.hu/czechrepublic>

City of Prague Language School: <http://www.sjs.cz>

Czech Association of Language Schools: <http://www.ajscr.cz>

Association of Language Schools and Agencies: <http://www.ajsa.cz> In Czech only

Czech Invest: <http://www.czechinvest.org>

Czech Republic: <http://www.atecr.cz>

Education Atlas: <http://www.atlasskolstvi.cz> In Czech only

Educity: <http://www.educity.cz> In Czech only

English College in Prague: <http://www.englishcollege.cz>

English online: <http://www.english-online.cz> In Czech only

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European Social Fund in Czech Republic: <http://www.esfcr.cz> In Czech only

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The New Anglo-American College in Prague: <http://www.aac.edu>

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Research Institute in Prague: <http://www.vuppraha.cz> In Czech only

Slunce – World of languages: <http://www.slune.cz>

Union of Interpreters and Translators: <http://www.jtpunion.org/spip>

The University of New York in Prague: <http://www.unyp.cz>