

Development of Foreign Languages in the Business Services Sector

Report by Accent for Professionals





Report prepared by Accent for Professionals (AfP)
in cooperation with ABSL

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FOREWORD



In 2016 three Polish cities (Kraków, Warszawa and Wrocław) reappeared on the Tholons Top 100 Outsourcing Destinations list. Kraków, out of the 100 best destinations for outsourcing in the world, held its position in 9th place which means that the capital of the Małopolska region has continuously been the best place in Europe for this kind of investment since 2014. Language competency, among many other reasons, is why so many companies decide to set up their centres here.

The scarcity of foreign language users is becoming a growing challenge for business service centres, and is about to get more severe. While there are a number of ways to resolve the issue at hand, businesses need to start thinking about how to address it from a long-term perspective.

The report which you hold in your hands presents language learning policies in the sector today, and provides recommendations for the future in the face of increasing language needs.

We believe that our report will give you some food for thought and help your organizations understand the importance of growing the pool of language users.

I wish you an enjoyable and thought-provoking read.

Agata Ziolo
Managing Director and Co-Owner of Accent for Professionals

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ABOUT THE REPORT



The aim of this report is to present language learning policies in the Business Services Sector and to provide recommendations for the future in the face of the growing language need.

The report was prepared on the basis of online survey results and in-depth interviews conducted among ABSL members. The online questionnaire consisted of three main areas: Languages in the Business Services Sector, Language Training Policies in the Sector and Languages in Recruitment. The survey was completed by 66 respondents. The data gathered was used to prepare the statistics included here. The representatives of 17 companies, who filled in the questionnaire, agreed to take part in an in-depth interview and answered additional questions which aided interpretation of the survey results. Out of 66 received responses, 7 were anonymous. Respondents' companies are located in 11 cities in Poland (Figure 1, p. 5). The majority of respondents are big companies which have over 500 employees or between 100 and 500 employees (Figure 2, p. 5).

Inside the report you will find graphs and pie charts presenting statistical results of the survey. Apart from them, we have provided experts' comments which combine information from the in-depth interviews and Accent for Professionals experience. At the end of the report we have placed our recommendations regarding language training policies.

We would like to thank all the companies who took the time to complete the survey and talk to us.

We would also like to thank ABSL for their support, especially to Mr Janusz Górecki, PhD.

*Aleksandra Skworzec
Project Manager at Accent for Professionals*

FIGURE 1 Respondents' location

Source: AFP's own study based on a survey addressed to business services sector centers (N=66 companies)

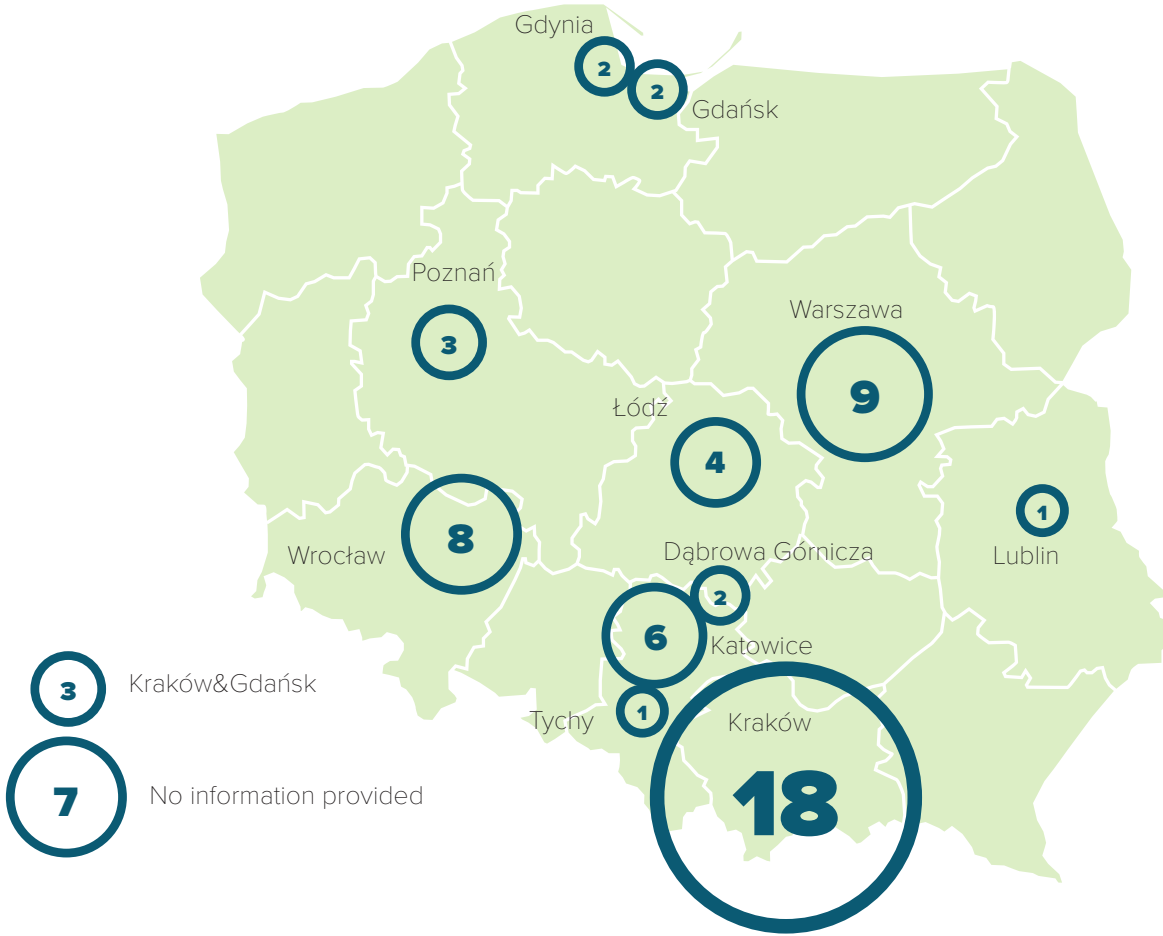
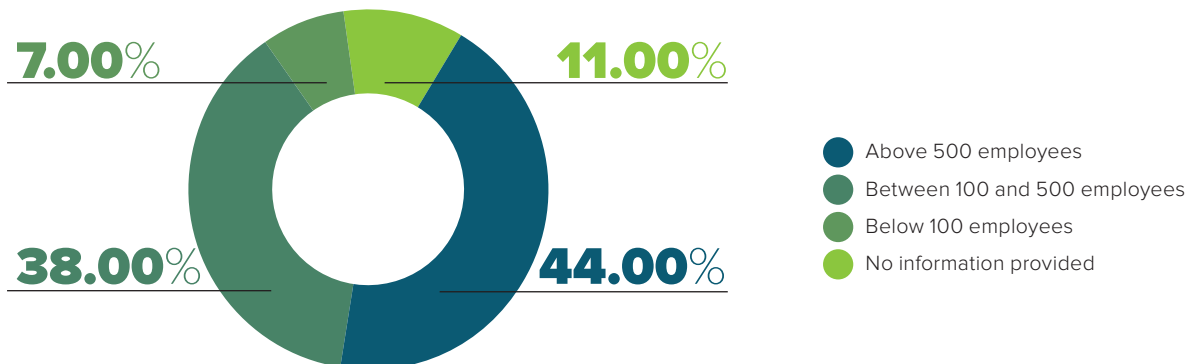


FIGURE 2 Respondents' company headcount

Source: AFP's own study based on a survey addressed to business services sector centers (N=66 companies)



3 LANGUAGES IN THE BUSINESS SERVICES SECTOR

FIGURE 3 Foreign languages used in companies to work with external clients

Source: AfP's own study based on a survey addressed to business services sector centers (N=66 companies)

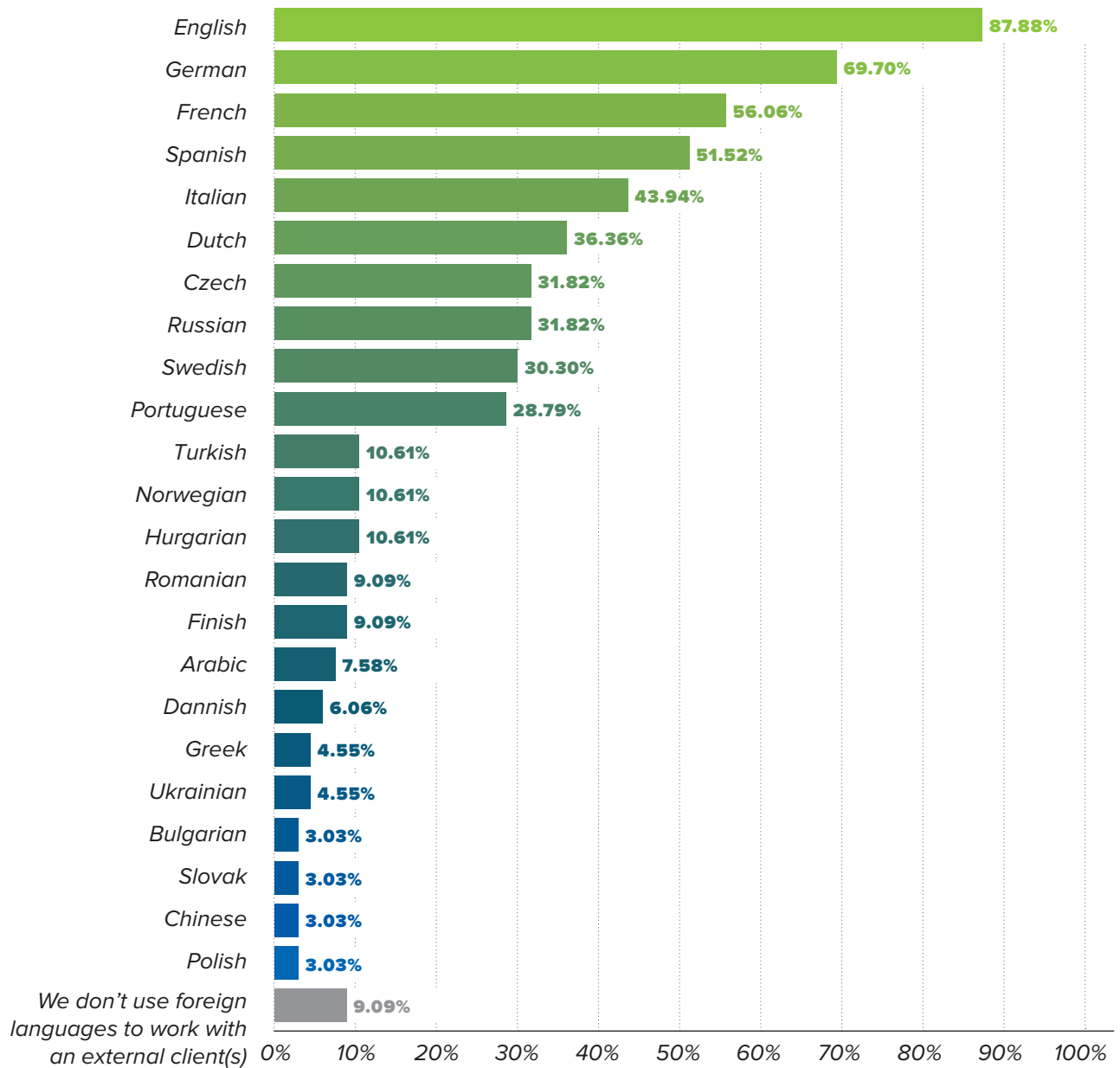
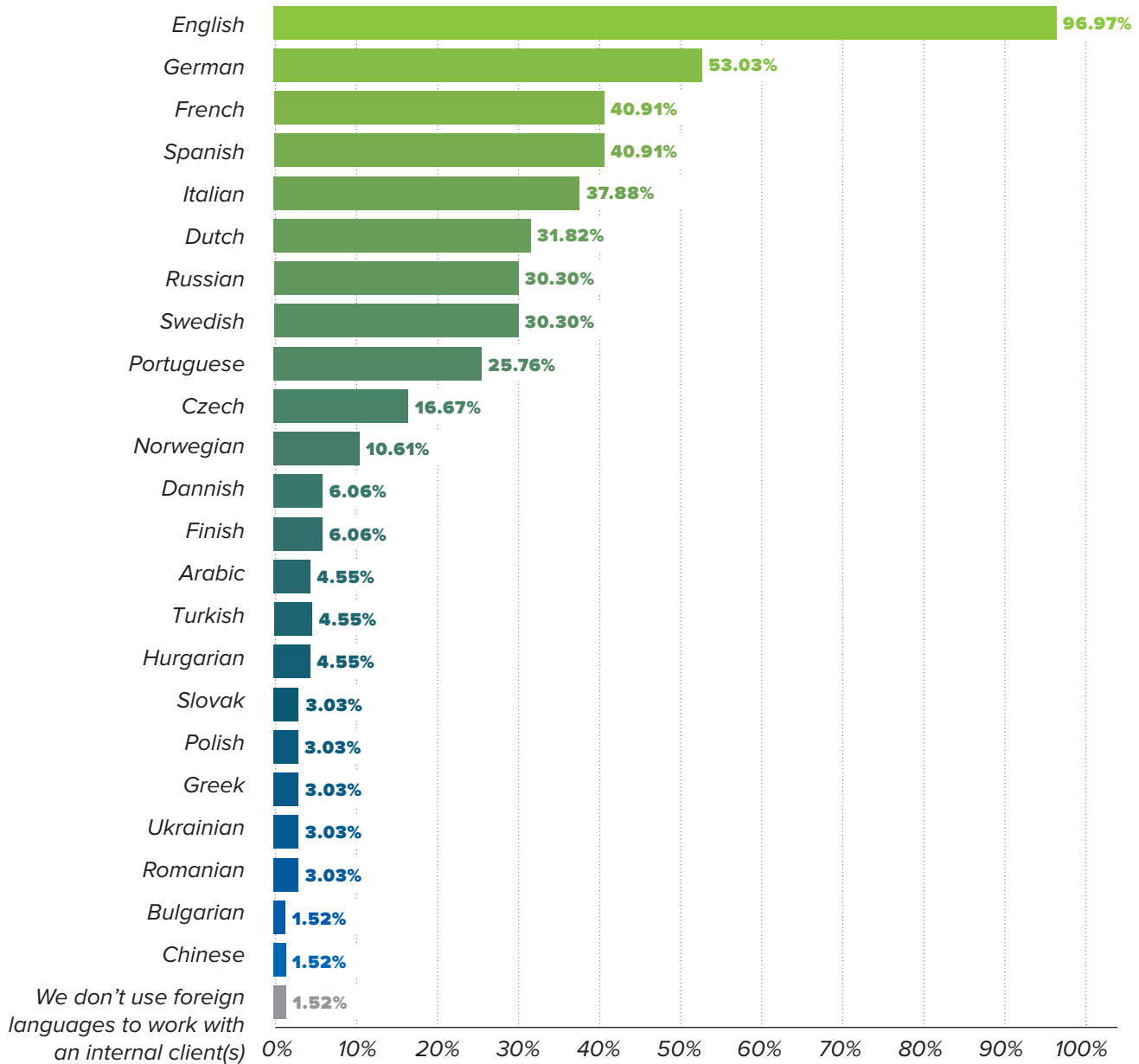


FIGURE 4 Foreign languages used in companies to work with internal clients

Source: AFP's own study based on a survey addressed to business services sector centers (N=66 companies)



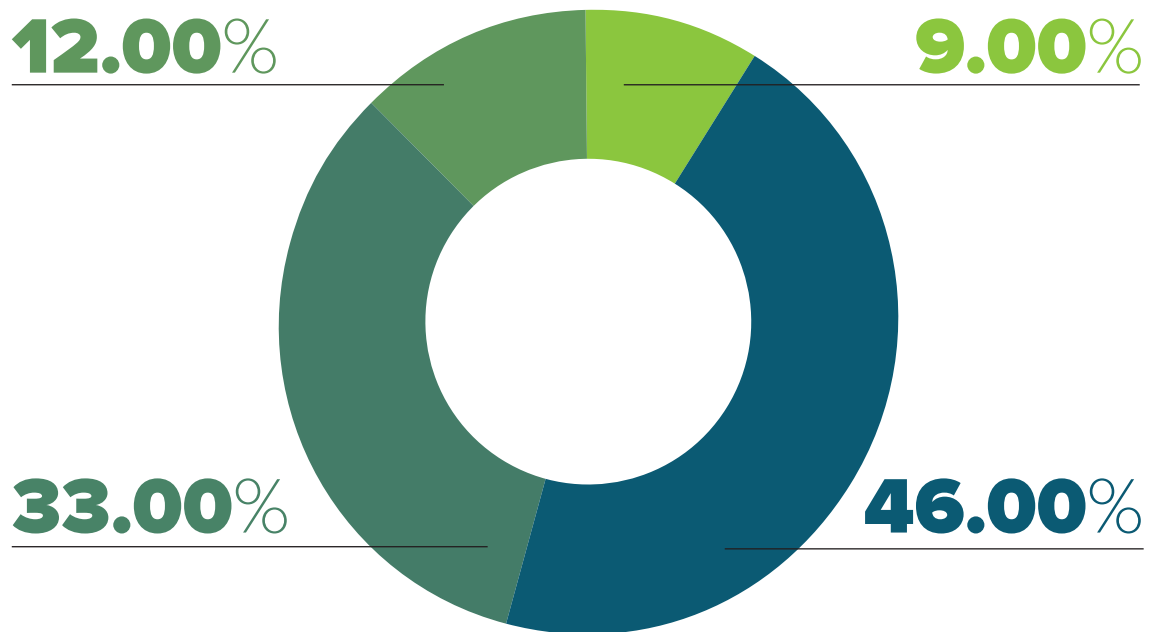
English is still the number one language used when communicating with internal and external clients. The three other top languages are German, French

and Spanish. As respondents stated in interviews, there will be bigger demand for German and French users in the near future.

4 LANGUAGE TRAINING POLICIES IN THE BUSINESS SERVICES SECTOR

FIGURE 5 | Language trainings vs. training plans

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)



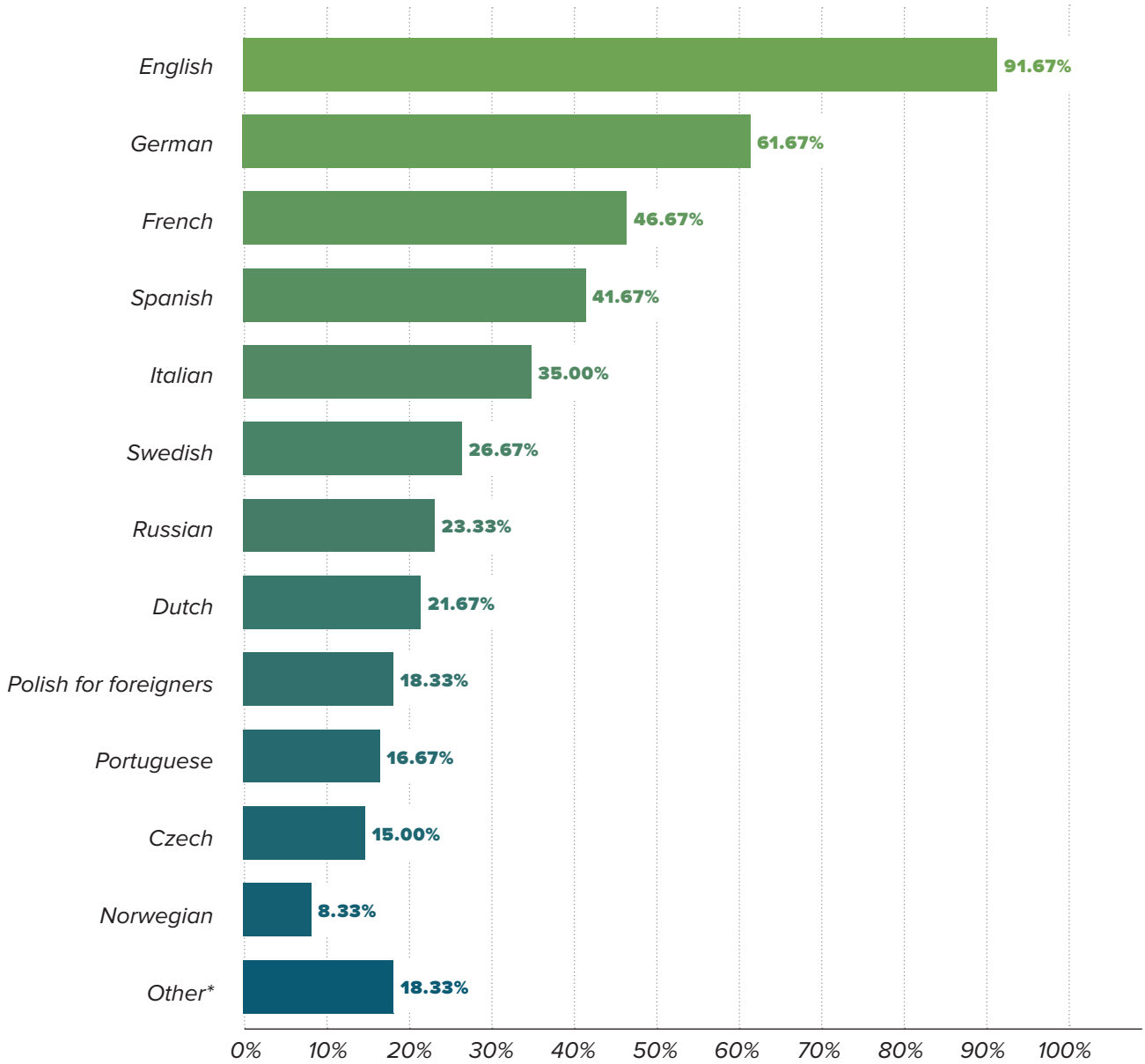
- BOTH - language courses included & not included in the employees' training plan
- Only language courses included in the employees' training plan
- Only language courses NOT included in the employees' training plan
- We don't offer any language courses

The biggest number of companies (46%) offer a combination of language trainings; both included and not included in the training plan. The respondents who included language trainings in employee training plans account for 33%. Companies which do not include language trainings in the training plans comprise 12% of respondents.

Experts' comment: In situations when language training is included in a training plan, employees usually must prove their progress, and very often the trainings focus on language that relates to the company's business. Thus, the employer may definitely count on a higher ROI. On the contrary, the situation with benefit courses, which are not included in the development plan, is that participants quite often treat them as something they do not necessarily have to commit to, and as a result these trainings do not bring much value to the business.

FIGURE 6 | Languages that are offered to employees to learn

Source: AFP's own study based on a survey addressed to business services sector centers (N=60 companies)

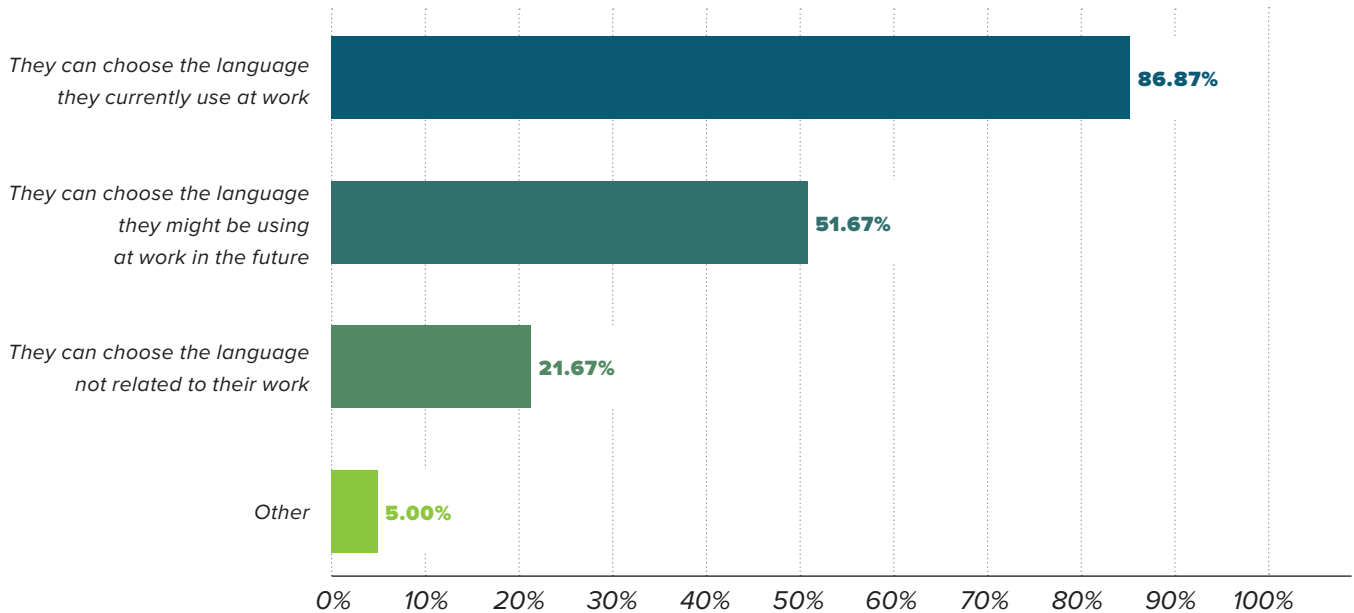


*Other languages:

Romanian, Turkish, Bulgarian, Serbian, Croatian, Hungarian, Chinese, Greek, Danish, Finnish

FIGURE 7 | Languages offered to employees in relation to their work

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)

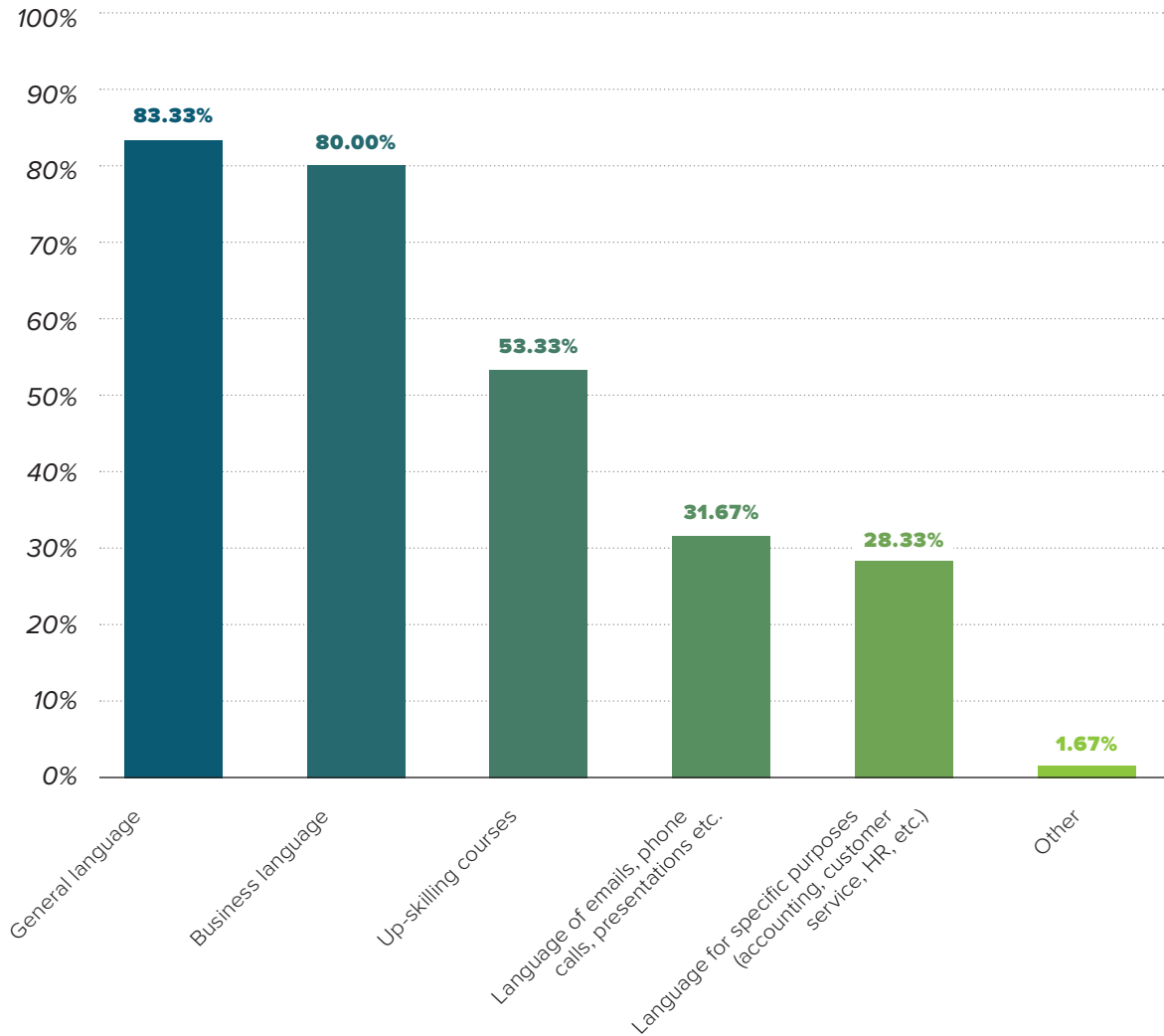


As shown in Figure 6, the most popular languages offered for employees are English (91.67%), German (61.67%), French (46.67%) and Italian (41.67%). Among the less popular languages it is worth noting that over 18% of the respondents offer their employees Polish for foreigners courses. Figure 7 shows that in the majority of the companies, employees can choose a course of language related to their work: the one they currently use (86.67%) or the one they might be using in the future (51.67%). The percentage of organizations in which employees can choose a language other than one which is work related is about 20%.

Experts' comment: Almost all companies offer English trainings to their employees. From our experience and interviews with respondents, most of these courses are in General English. Keeping in mind that most companies declare they employ candidates at a communicative level allowing them to work, investment in specific courses seems a bit more valuable as that would better relate to their business needs. As the respondents shared in the interviews, the tendency to offer German, French and Spanish courses is a way of dealing with recruitment challenges in these languages. The companies invest in developing the current language level of the employees speaking the language so they have a pool of speakers inside their organization. Polish for foreigners in language trainings portfolio indicates that more and more foreigners are being employed in the sector. In the interviews, the respondents stated that the employees are offered these courses to give them a chance to feel more comfortable in the country.

FIGURE 8 | **Types of language trainings offered by companies**

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)



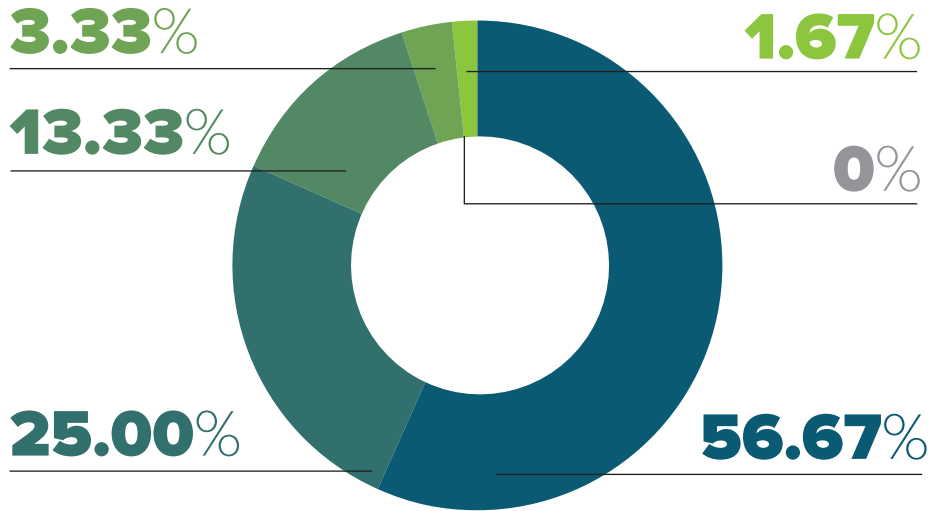
The majority of the respondents offer two types of the language trainings: general (83.33%) and business language (80%). About half of the companies also have up-skilling courses in their training portfolio. Around 30% also offer more specific courses: skills-focused or language for specific purposes.

Experts' Comment: The most popular course type, which is still general language, does not guarantee the highest ROI.

Diversifying the courses into more specific ones can influence the ROI to a greater extent (up-skilling, skills courses, courses for specific purposes). It's a promising tendency that over 50% of the respondents' companies are investing in the growth of the pool of language users and have up-skilling courses. The nature of such courses is intensity and the short period over which a person boosts their language level, or learns a new language from an elementary level. It's important to remember that it's more rewarding if these trainings focus on the language used by the participants in their work.

FIGURE 9 | Employees participation in the language trainings costs

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)



- Employees don't participate in the language trainings costs
- Employees cover up to 30% of the costs
- Employees cover 30% - 50% of the costs
- Employees cover 51% - 70% of the costs
- Employees cover more than 70% of the costs
- Other

More than half of the companies cover all costs of the language trainings. In almost 40% of the companies, employees need to cover up to 50% of the training cost.

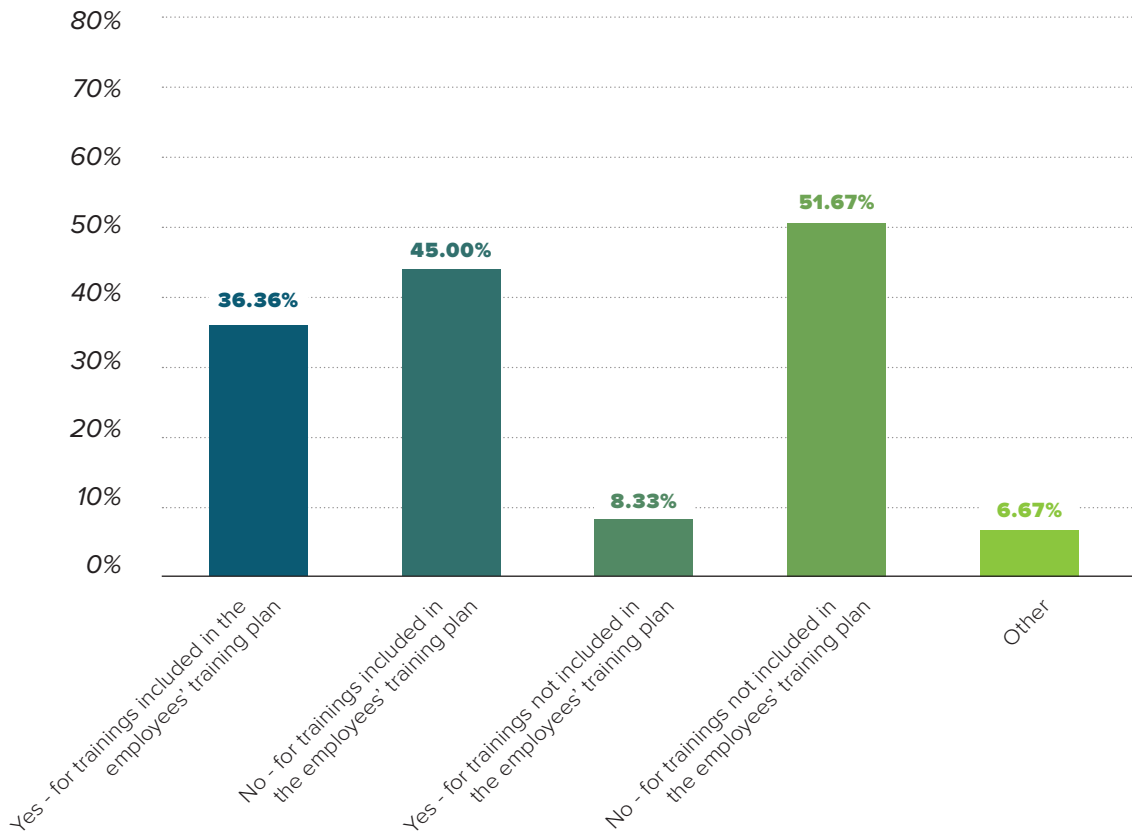
Experts' Comment: The majority of companies cover the language trainings costs. This seems to meet the candidates and employees' expectation of getting such trainings for free, as benefit courses. Very often such courses are treated as something with no strings attached and in the end companies spend money on something that is not really appreciated. On the other hand, almost 40% of the surveyed companies

share the language trainings cost with their employees. As the respondents confirmed in interviews this solution motivates employees more and the business results are more visible.

It is common practice that in the case of trainings for which costs are covered by the employer, participants need to sign loyalty agreements. Some companies require certain attendance and test results from the employees; if the requirements are not met, the participants need to return either some part or the full cost of the training, or can't take part in any language trainings for a certain period.

FIGURE 10 | Language trainings in relation to employee work hours

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)



In the majority of the surveyed companies, language trainings are not allowed during the employees' work hours; this applies to both kinds of courses - included and not included in the training plan.

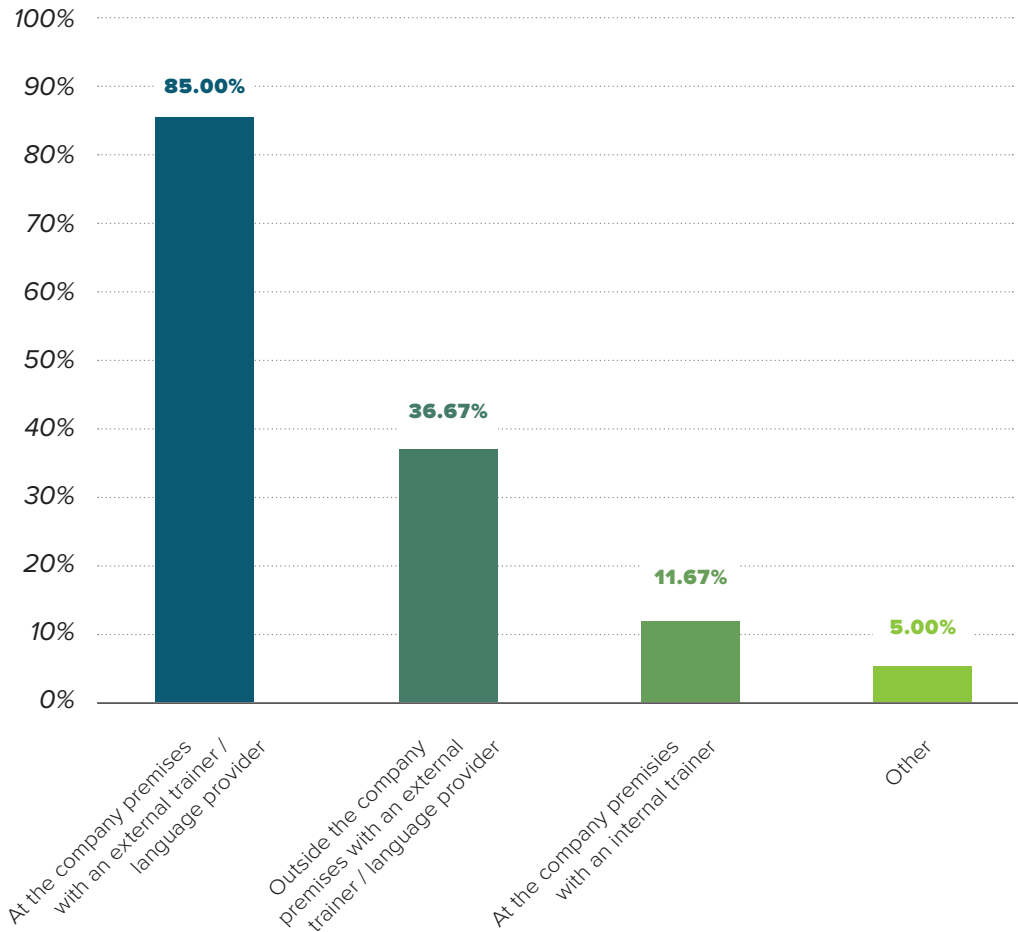
On the other hand, of language trainings that are part of a development plan or a training plan, 36.6% of respondents allow them during work hours.

Experts' comment: Employers are often worried that having language classes during work hours will affect employee performance and availability for clients.

This is understandable in the case of pure benefit courses which are a privilege for employees. It is different when it comes to courses included in a training/development plan. These are usually recommended by the managers and there is a business need behind it. In this case, a course is essential for business and it is good to include it during the work day. Sometimes even benefit courses take place during working hours. A common solution in this situation is that employees have to work this time off later during the week or at least half of this time.

FIGURE 11 | Place of language trainings

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)



The majority of companies choose an external language trainings provider. When it comes to organization, the most popular option is to have the trainings on the company's premises (85% of responses). The second option (over 36% of responses) is to have the trainings off the company premises with an external trainer/language provider.

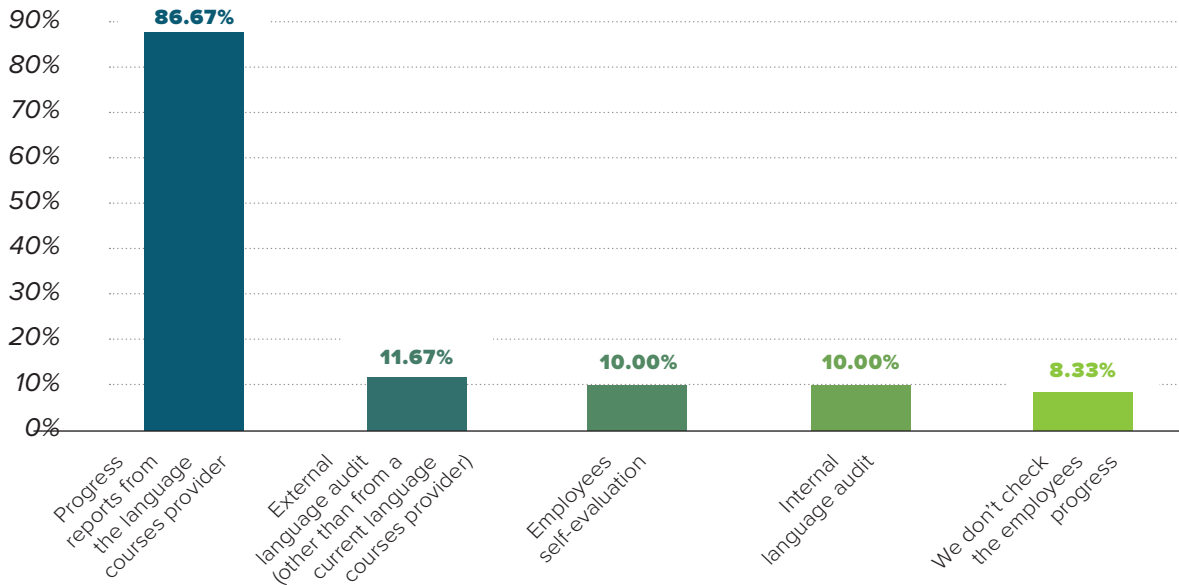
Experts' Comment: The advantage of the first option is having one language provider to deal with, which may

result in simplifying of the administration of the courses - one invoice, consistent reporting, seamless administrative and methodological support. The main challenge of such a solution might be room booking.

It might seem that having language trainings outside the company causes less work for L&D or HR Departments, but in fact you have to cooperate with many language provides, you have less control over such trainings, and you receive numerous invoices. In the end it's hard to assess if the budget is being spent appropriately.

FIGURE 12 | The ways of checking employee progress

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)



The great majority of respondents (over 86%) stated that they use reports from the language providers to check employee progress.

Experts' Comment: As progress reports from language providers are the most common option, the basic

components one can expect are: language level, attendance and test results. Depending on your needs, reports may include recommendation for future language development, a detailed attendance report, comparison with the previous semester, data summary etc.

FIGURE 13 | Challenges with language trainings

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)

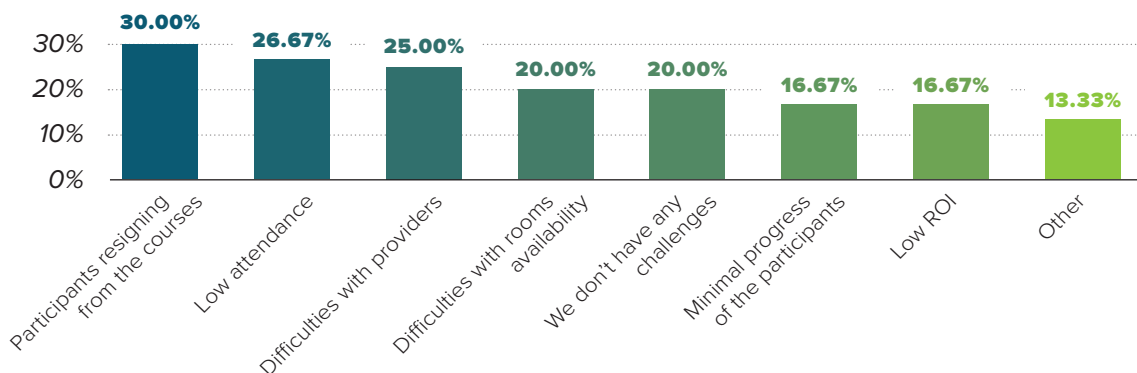


FIGURE 14 | **Reasons for employees resigning from language trainings**

Source: AfP's own study based on a survey addressed to business services sector centers (N=60 companies)

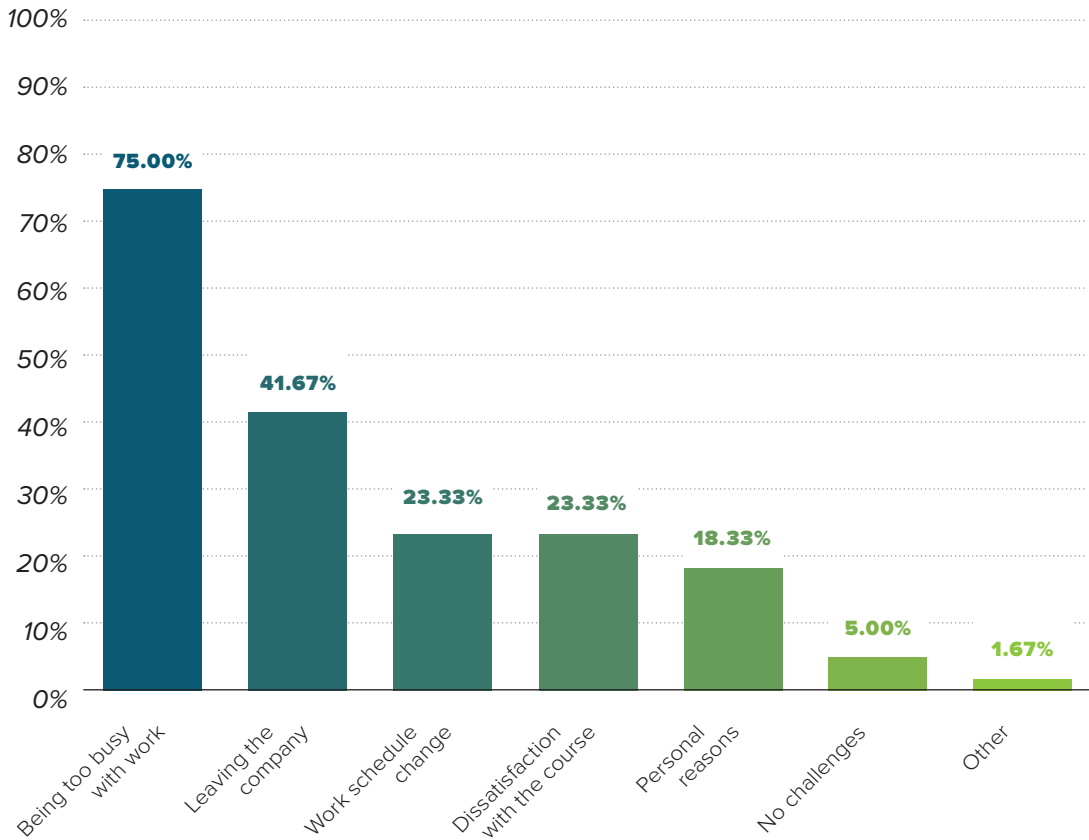


Figure 13 shows that the most frequently mentioned challenges with language courses are participant resignations (30%), low attendance (26.67%) and difficulties with providers (25%). In Figure 13 we can see that 75% of language training participants resign from the trainings because they are too busy with work. The three other most common reasons of resignation are leaving the company, work schedule change and dissatisfaction with the course.

Experts' Comment: As the respondents stated, the main challenges they face with language trainings is participant

resignation and low attendance. The main reasons for this situation are not directly connected with the language training as such (being too busy with work 75%, leaving the company 42% or work schedule change 23%). Experience shows that having classes before or after working hours doesn't resolve attendance issues; whether due to overtime or other reasons, employees miss classes. Dissatisfaction with the course (23%) is also mentioned, alongside personal reasons (18%). Various difficulties with language training providers were mentioned in interviews, e.g. problems with scheduling, unprofessional trainers, keeping deadlines, etc.

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LANGUAGES IN RECRUITMENT

FIGURE 15 | Share of new hires that need foreign language trainings

Source: AfP's own study based on a survey addressed to business services sector centers (N=66 companies)

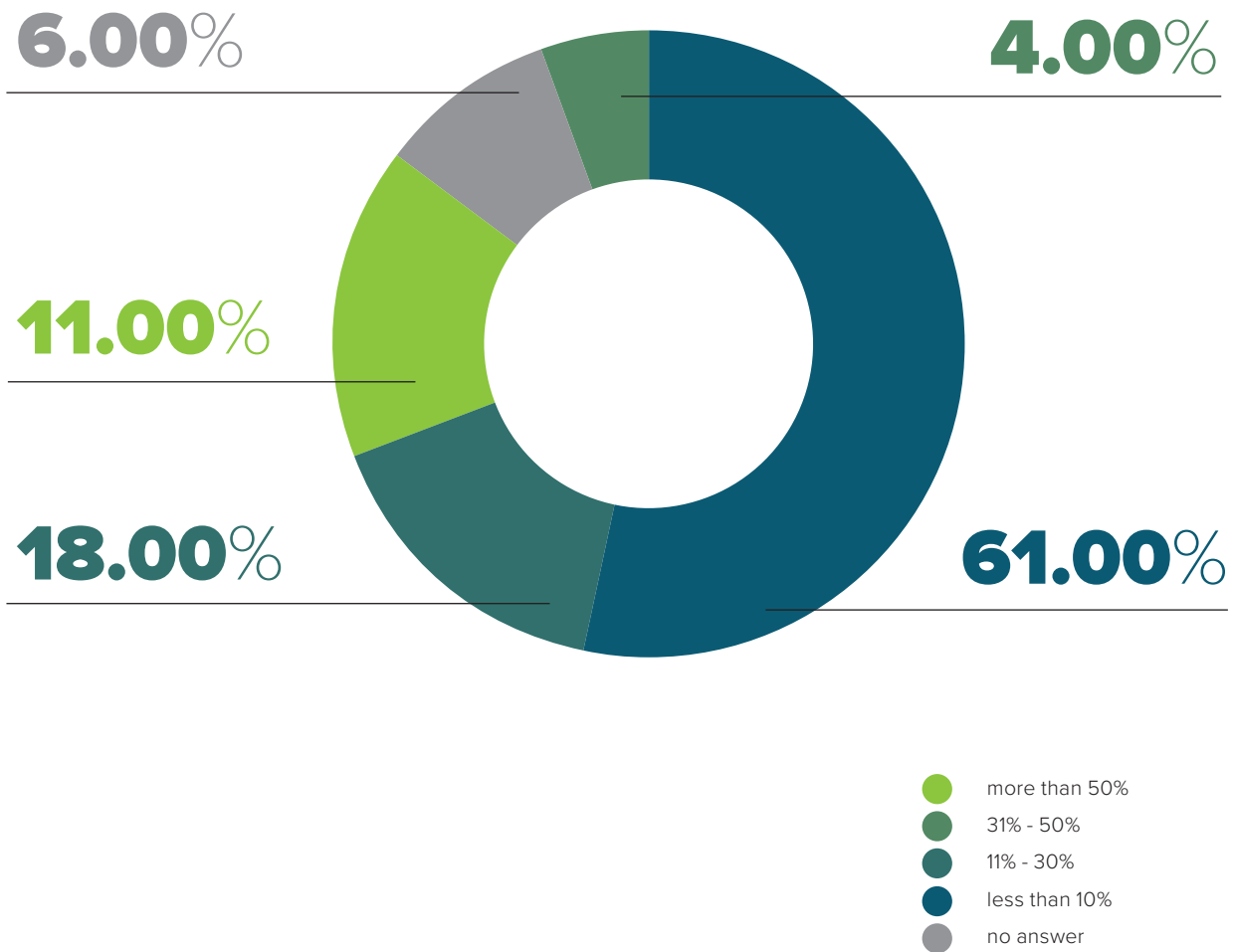
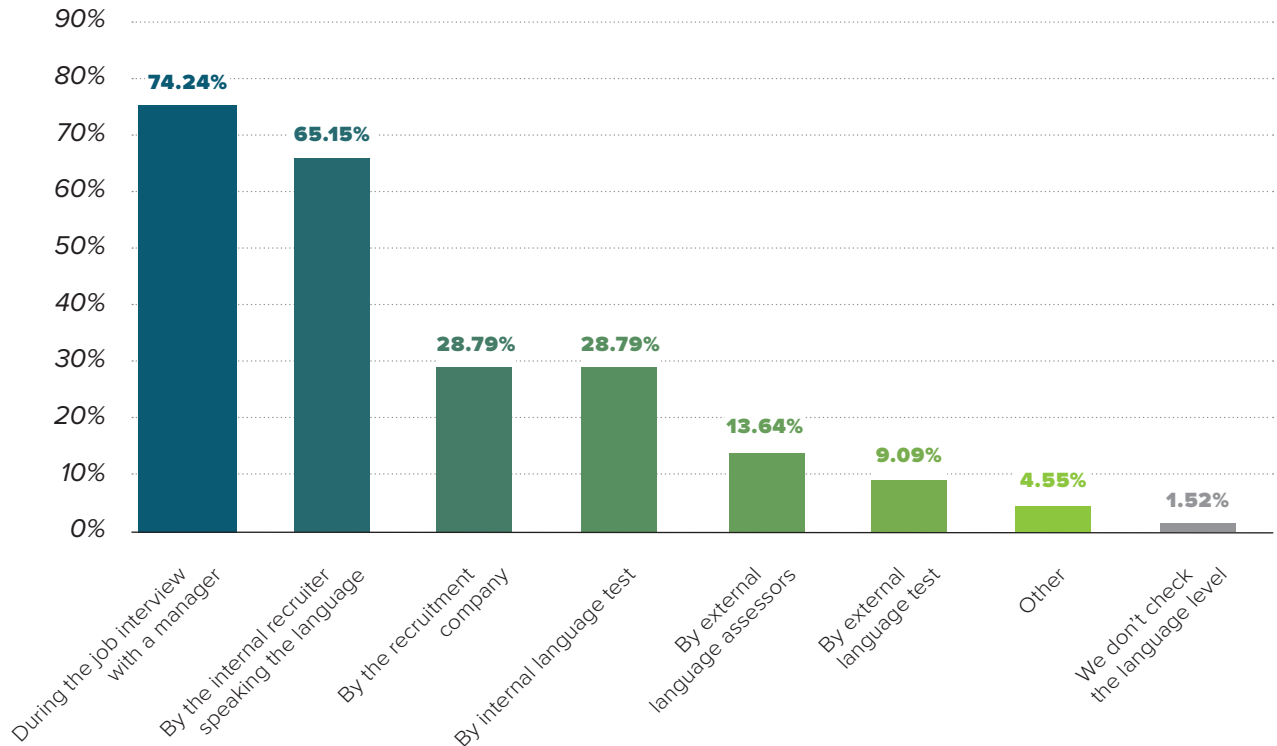


FIGURE 16 | Language check in the recruitment process

Source: AfP's own study based on a survey addressed to business services sector centers (N=66 companies)



In Figure 15 we can see that over 60% of respondents stated that less than 10% of their new hires require language training. Figure 16 shows that the most common ways of checking the candidates' foreign language level is during the job interview with a manager (74.24%) or a conversation with an internal recruiter (65.15%) speaking the language. Only 15% of the respondents' companies use either external language assessors or an external language test.

Experts' Comment: It is surprising that almost 75% of the respondents claim that the language level of a candidate is most often determined by the managers, who very often are not experts in the given language, during the interview. Such a solution might have its drawbacks, as sometimes a candidate who has language potential that can be activated in an intensive course can be rejected. As the respondents mentioned, the methods of conducting

the language check vary from specially prepared tests (usually a text to translate) to random verification. A very high percentage of language checks are delivered by an internal recruiter, often a native speaker. Only 13% of language checks in the business sector are run by external language assessors, which can be an effective and professional solution for international and multinational centres as the language level assessors are trained in delivering the most objective and calibrated evaluations of the language level.

Respondents in interviews mentioned two ways of rewarding employees who know a second language, apart from English. Some companies offer a higher monthly base wage, and some add a "language bonus". Both solutions have their advantages and disadvantages. Definitely it may be problematic when a person is moved to another department and stops working in a given language.

FIGURE 17 | Employment of specialists without expected level of a foreign language

Source: AfP's own study based on a survey addressed to business services sector centers (N=66 companies)

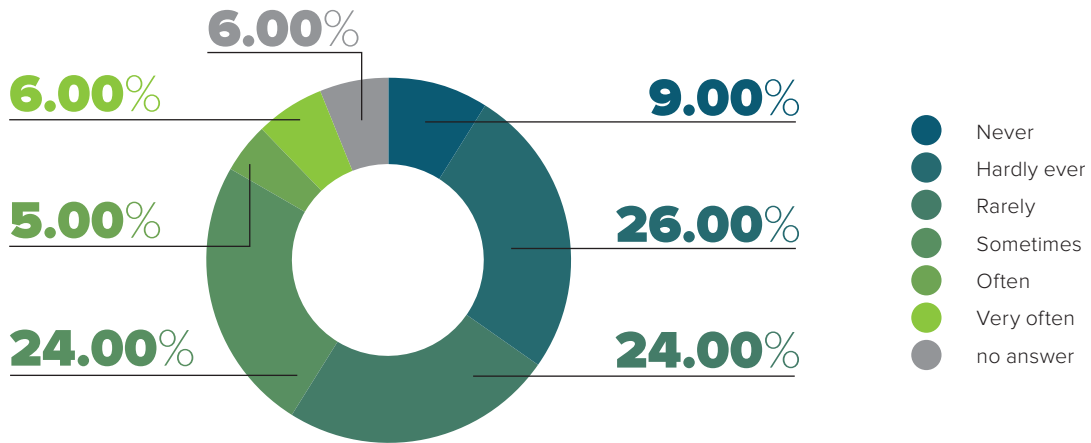
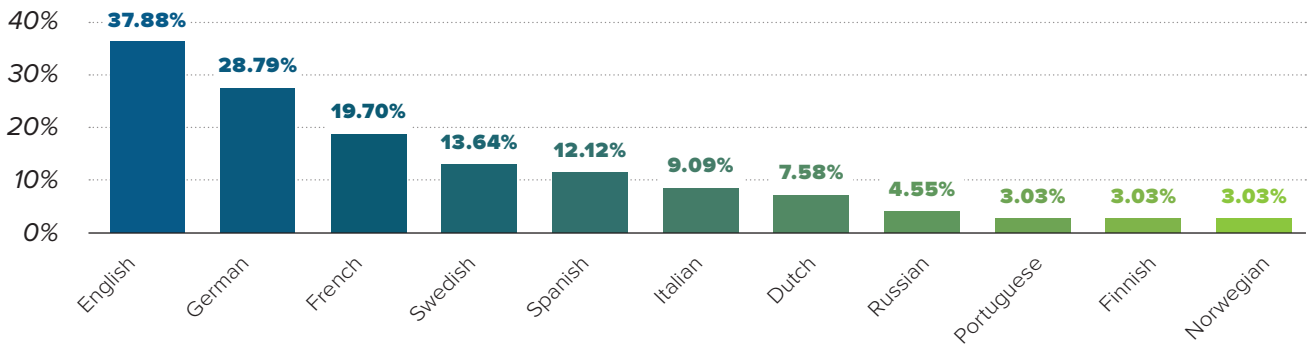


FIGURE 18 | The most popular languages of specialists employed without the expected foreign language level

Source: AfP's own study based on a survey addressed to business services sector centers (N=66 companies)



Among the respondents, 24% of them indicated that they sometimes employ specialists without the expected level of a foreign language; the same percentage stated that they do that rarely. See Figure 17. The above situation most often applies to English (37.88%), German (28.79%) and French (19.70%). See Figure 18.

Experts' comment: When recruiting, companies have established requirements regarding the minimum level of foreign language of a candidate. For some languages, which are in higher demand in the labour market, they struggle more to find a suitable candidate and sometimes they have to go for a compromise and employ a specialist with a lower level of language. In such instances, companies sometimes invest in upskilling courses, which help them deal with the low language level of new hires.

FIGURE 19 | Employment of experts in the given language without relevant business experience
Source: AfP's own study based on a survey addressed to business services sector centers (N=66 companies)

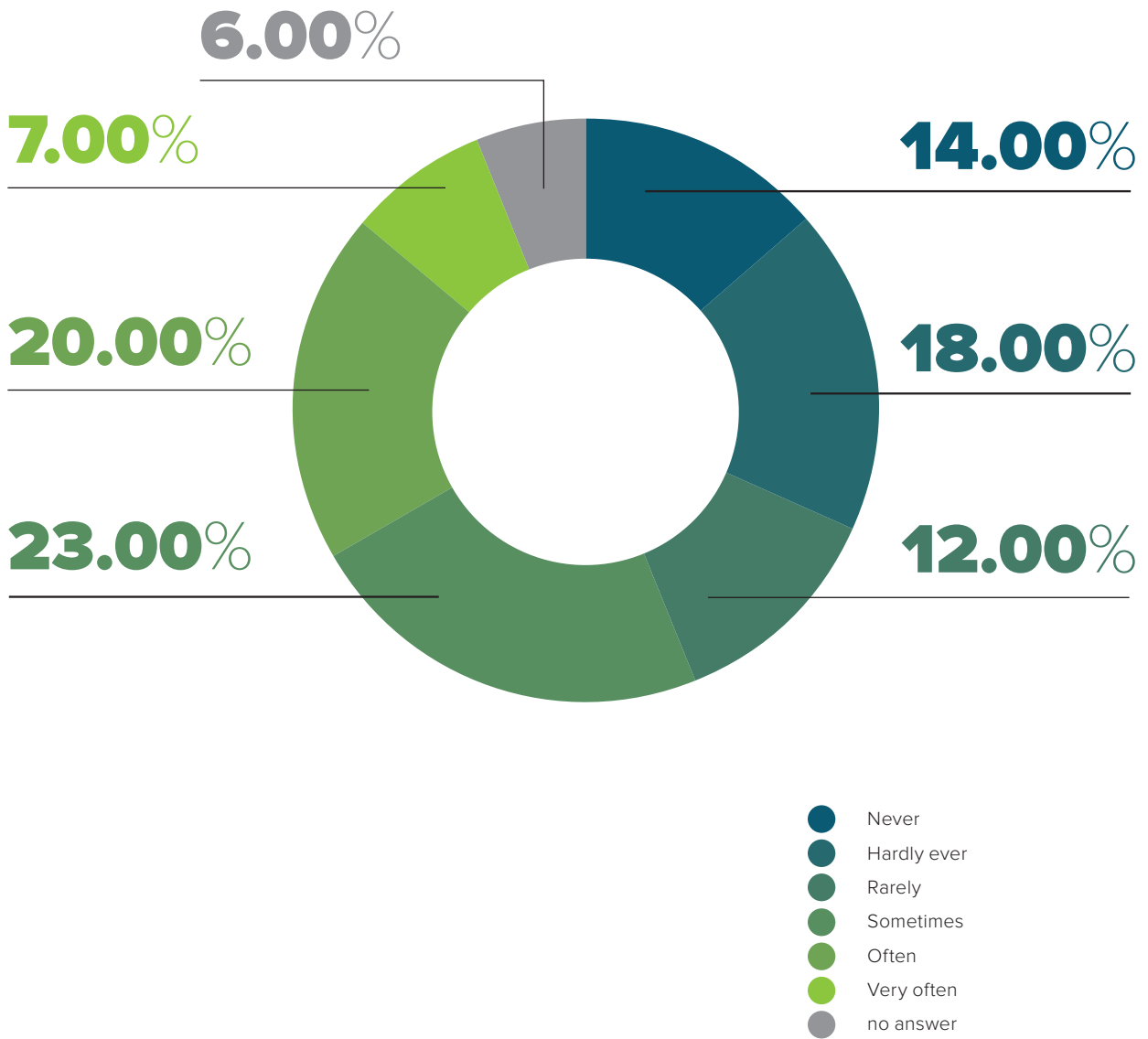
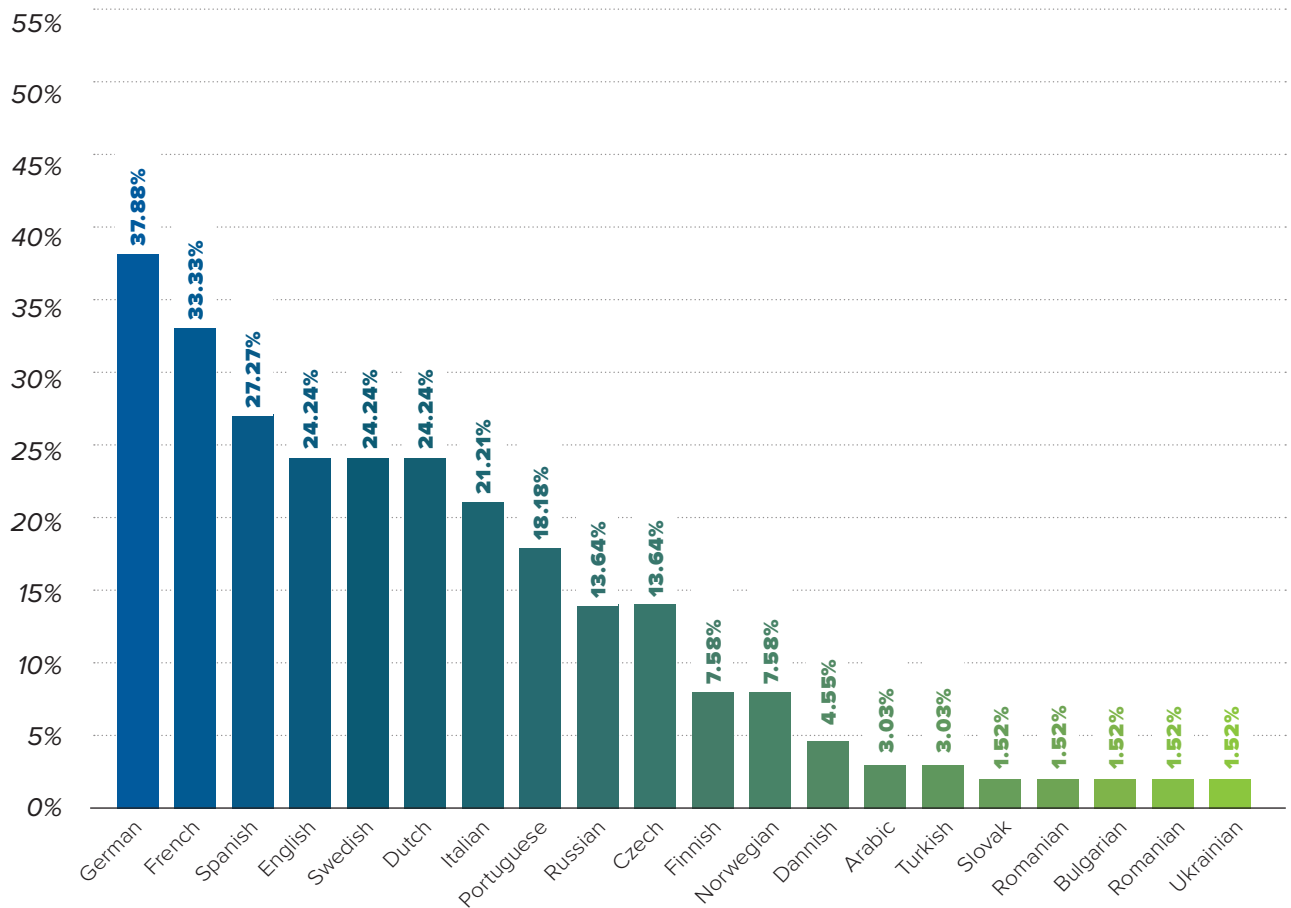


FIGURE 20 | **The most popular languages of experts in the given language employed without relevant business experience**

Source: AFP's own study based on a survey addressed to business services sector centers (N=66 companies)



Among the respondents, 23% of them indicated that they sometimes employ experts in the given without relevant business experience, and 22% of the companies stated that they do that often. See Figure 19. The above situation most often applies to German (37.88%), French (33.33%) and Spanish (27.27%). See Figure 20.

Experts' comment: In some business centres knowledge of foreign language is the most important requirement for employing a candidate. Business processes can be learnt in a relatively short time, so experts in the given language without business experience are willingly employed. Sometimes they require only a course related to business realities, e.g. business writing, call handling, etc.

6 CONCLUSIONS & EXPERT RECOMMENDATIONS

1. Language Training Policies

Accent for Professionals has been supporting Business Services Sector for almost 13 years. Our experience shows that companies receive higher ROI when they offer specialized language training for their employees rather than organizing semester benefit courses.

BENEFIT LANGUAGE COURSES	LANGUAGE TRAININGS
1. Offered to all employees, so many people may benefit from the language courses	1. Offered to employees who need language development
2. Usually not included in training plans or personal development plans	2. Focusing on specific language skills that are necessary at work
3. Before or after work time	3. Included in training plans and/or personal development plans
4. Once a week, 60 or 90 minutes classes	4. More intense and bringing results in a short time
5. Low participants' motivation	5. Included in the employee's work hours, hence lower or no absences
6. People resigning after a couple of lessons because of overtime, personal reasons, etc.	6. Higher participant motivation
7. Very often working with a course book not related to the language used at work	7. Courses based on a tailored syllabus and authentic materials
8. Low ROI	8. High ROI

During the interviews, the respondents mentioned various challenges they experience with the language trainings providers. Here's what you should expect from companies providing language trainings:

1. To be a business partner who is willing to learn what your business and business needs are and help your company grow. It very often means e.g. engaging a company's manager/team leaders in contributing to the trainings syllabus.
2. Professionals administration and methodological consultancy.
3. Professional language trainers with corporate teaching experience
4. Language trainings provider tasks should include, among others, the following: - organising placement tests - grouping and scheduling - communication with HR or L&D - supporting and supervising trainers team - regular trainings observations and feedback - running satisfaction surveys and reporting their results - communication with the courses participants - reporting - suggesting new solutions.

2. How to Grow the Pool of Language Users Today

LANGUAGE ASSESSMENTS

A relevant recruitment process should be the first step here. When assessing candidate's language level, it's crucial to focus on assessing business skills e.g. email writing or how the person handles phone calls. Traditional multiple choice tests may not show the real level of a candidate. Language assessments should be conducted by professional assessors, either external auditors or specially trained internal recruiters.

DEVELOPING INTERNAL LANGUAGE SPEAKERS POOL

While there's little hope for the immediate change of the public education system to answer the needs of the fastest growing business sector, there are other solutions that the Business Services Sector companies can implement, to guarantee the highest level of business delivery.

Taking into account the fact that there is a constant demand for specialists with second languages and that recruiting them is a great challenge, it seems that developing the language user pool in the organization might be a solution. One of the ways to do this is to conduct upskilling trainings.

Upskilling is an intensive language training in the context of a specific job: Transition Process, Customer Service, Procure to Pay, Record to Report, Order to Cash, General Ledger and others.

The main aim is equipping new-hires or current employees with a required language level in 1–4 months.

Such courses focus on developing business communication skills required on the job. It's much faster to learn the language than to educate somebody in a specific business area.

However, there are crucial things to remember and take into consideration when organizing such trainings: choose the right people, focus on the business language and sign loyalty agreements with the participants.

We hope that our report was an interesting and useful read, which will give ideas and provoke discussion.

If you would like to share your thoughts or comments with us, please contact Agata Ziolo,

at agata.ziolo@4professionals.pl.



www.4professionals.pl