

INVESTIGATING THE EFFECTIVENESS OF  
*ENGLISH FOR OCCUPATIONAL PURPOSES (EOP)*  
TRAINING: CORPORATE PROGRAMS IN CHINA

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Training: Corporate Programs in China

by

XIE, Qing

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## **STATEMENT OF ORIGINALITY**

I, XIE, Qing, hereby declare that I am the sole author of the thesis and the material presented in this thesis is my original work except those indicated in the acknowledgement. I further declare that I have followed the Institute's policies and regulations on Academic Honesty, Copy Right and Plagiarism in writing the Thesis and no material in this thesis has been published or submitted for a degree in this or other universities.

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## ABSTRACT

Investigating the Effectiveness of *English for Occupational Purposes (EOP)*  
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### Abstract

Workplace programs for *English for Occupational Purposes (EOP)* training represent a corporate investment in language skills enhancement and human capital development. However, there is a lack of empirical research on the effectiveness of these programs in the Chinese context.

This thesis investigates the training effectiveness of *EOP* programs in Chinese workplaces. The key research questions are “How effective are *EOP* training programs in preparing employees for global business communication in the workplace context?” and “What factors contribute to or hinder the effectiveness of *EOP* training programs in the workplace context?”.

The thesis examines a range of training effectiveness variables such as intended outcomes, unintended outcomes, difficulties in learning/workplace English use, sustainability of learner autonomy, international business communication performance, and sustainable livelihoods. The study also identifies the factors that facilitate or hinder effective learning outcomes for workplace *EOP* training programs and explores the potential benefits of these programs.

This investigation makes use of theories from a range of fields including *ESP* (*English for Specific Purposes*), TESOL, Technical and Vocational Education and Training (TVET), lifelong learning, adult education, employability skills development, communicative competence development, workplace language and literacy training, workplace training and learning, and training program evaluation. Based on the synthesized theories and the evaluation models, an evaluation framework of *EOP* programs in the workplace is constructed for the first time.

The research methods used in this study include qualitative interviews with representatives of multinationals in China, i.e. Hong Kong and mainland China, surveys with working adults and business background study in stage one, and case studies in mainland China in stage two. The case studies employ research instruments such as qualitative interviews, learner surveys, learner self-assessments, participant observation, workplace observation, trainer reflection, material evaluation and document study to answer the research questions from varied perspectives.

The first stage findings show that the challenges faced by workplace *EOP* training programs include irregular use of workplace English use, uneven training demand, difficulties with program implementation in the workplace, problems in meeting business specific learning needs or performance goals, and inadequate qualifications of workplace *EOP* trainers. The characteristics of effective workplace *EOP* training courses are summarized under three themes, the identification of workplace English learning needs, the development of effective training programs based on those needs and the provision of adequate resources and support.

The second stage of the study further applies the evaluation framework to investigate the effectiveness of three corporate *EOP* programs in mainland China. The findings show that these *EOP* training programs have effectively prepared employees to engage in international business communication upon completion of the courses. The self-assessment results show that all three programs enabled the participants to reach an intermediate level of language ability. Substantial long-term progress is difficult to identify as there are many factors which influence the training participants' success in developing workplace communicative competence development. These factors include class size, language environment and the learner's commitment to the learning process. There have been individual successful cases in which the training participants excelled in international business communication performance. In addition, a model for workplace *EOP* training program development and implementation in the Chinese context has been constructed. This model is replicable for use in future studies.



## **ACKNOWLEDGEMENTS**

This dissertation marks a stage in my professional career and is dedicated to a decade of hard work and persistence in English language learning, teaching and personal development. It particularly owes thanks to my experience of five years' working as workplace English trainer and university lecturer.

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XIE, Qing

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The Hong Kong Institute of Education

## LIST OF ABBREVIATIONS

*BEC Business English Certificate*

*CEF Continuing Education Fund*

*CET College English Test*

*EAP English for Academic Purposes*

*EBP English for Business Purposes*

*EFL English as a Foreign Language*

*E4W English for Work*

*E4WP English for the Workplace*

*EGP English for General Purposes*

*EMI English Medium Instruction*

*EMP English for Medical Purposes*

*EOP English for Occupational Purposes*

*EPP English for Professional Purposes*

*EVP English for Vocational Purposes*

*EPQ Eysenck Personality Questionnaire*

*ERB Employee Retraining Board*

*ESL English as a Second Language*

*ESP English for Specific Purposes*

*ETS English Test Service*

*GRE General Record Examination*

*LCCIEB London Chamber of Commerce and Industry Examinations Board*

*LEP Limited English Proficient*

*LLN Literacy, Language and Numeracy*

*LSP Language for Specific Purposes*

*OECD Organization of Economic Cooperation and Development*

*OJT On-the-job Training*

*PPP Present Practice Perform*

*PSA Present Situation Analysis*

*SAS Style Analysis Survey*

*SILL Strategy Inventory for Language Learning*

*SL Sustainable Livelihoods*

*TESOL Teaching English as a Second Language*

*TOEFL Test of English as a Foreign Language*

*TOEIC Test of English for International Communication*

*TNA Training Needs Analysis*

*TSA Target Situation Analysis*

*TVET Technical and Vocational Education and Training*

*VESL Vocational English as a Second Language*

*WEC Workplace English Campaign*

*WELL Workplace English Language and Literacy*

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## DEFINITIONS OF TERMS IN THE STUDY

### ***English for Occupational Purposes (EOP)***

*EOP* is a type of *English for specific purposes (ESP)*. *EOP* can be further divided into *English for professional purposes (EPP)* and *English for vocational purposes (EVP)*. *EOP* also includes *English for medical purposes (EMP)* and *English for banking industry*. *EOP* is used both in the university context by students preparing for future careers and in the business context (Dudley-Evans and St. John, 1998).

### **Communicative Competence**

Communicative competence is derived from the behavioral study of communicative skills. Effectiveness and appropriateness are two key measurements for communicative competence (Rickheit, Strohner, and Vorwerg, 2008, p. 24).

### **Workplace Learning**

Workplace learning comprises of formal, non-formal, self-directed and informal learning activities, which is an important part of the current management literature (Solomon, 1999).

## **Program Evaluation**

Program evaluation follows a process of systematic data collection of necessary information, assessment of program effectiveness and efficiency and gathering of participants' perceptions of the program in the particular context (Brown, 1989, p. 235).

## **Learner Autonomy**

Learner autonomy refers to the learners' competence in managing their own learning processes, and it can be replaced by such terms as learning independence, self-direction, autonomous learning and independent learning. Technically, learner autonomy denotes the skills needed for unguided learning. Psychologically, it denotes the attitudes and cognitive abilities that learners possess in the self-management of learning. Politically, it denotes the empowerment of learners in controlling the learning process themselves (Palfreyman, 2003, p. 1-3).

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## CHAPTER 1

### INTRODUCTION

#### 1.1. Study introduction

##### 1.1.1 The status of English use in the global and Chinese context

This research investigates the worldwide trend of enabling corporate employees to embrace workplace English communication challenges arising from economic globalization. Twenty-first century workplaces such as McDonald's and Citigroup have introduced new requirements to their workforces in the midst of a globalized economy, the industrial shift from manufacturing to service industries, and the increasing use of technology in business according to international organization reports.

Globalization can have a significant impact on a country's businesses, which in turn influences the labor market (Wessel, 2011). It specifically brings challenges to talent employability as the international setting demands strong global communicative competence. According to a World Bank report, Indian engineering employers require communication skills in the workplace, which include "designing and conducting experiments, analyzing and interpreting data, reading, communication in English, verbal communication, written communication and listening skills". "Communication in English" effectively

has been ranked as the most important skill for Indian engineers in the workplace (Blom and Saeki, 2011, p. 15).

EF Education First, a Sweden-based global language service provider, released a report (2012a) indicating that English has become increasingly important for employees working in the international companies, as they must use it every day at work (p. 11). English learning is driven by globalization, economic development, the Internet and international scientific research activities. Corporations choose English as their business language “to minimize productivity loss” and the report explained that “many companies, both large and small, are taking the logical next step by asking their employees to use and improve their English every day in the workplace” (p. 16). This English learning initiative can enhance not only employability skills development but also quality of life as an important part of human development (p. 20). The Global English Business English index report (2013) indicated that employees have career advancement with business English skills and employers would like to see their improvement in English.

The global quest for English communication skills is also gathering strength in Chinese businesses. The 2013 EF Education First report (2013, p. 12) indicated that there is a strong motivation towards English learning in Chinese companies

when investment is made to “sharpen workforce’s English skills” and more overseas businesses are requiring Chinese managers to communicate in English with foreign colleagues. In the Chinese context, English is also linked with career development. Nevertheless, a Chinese media survey reported that English communicative competence of Chinese employees is still inadequate. It can be difficult for young staff in Chinese companies to answer telephone calls from overseas and reply emails without consulting a dictionary (Lu, 2007). This inadequacy could lead to communication ineffectiveness in the corporate internationalization process.

The current status of English use in the Chinese workplaces in a global environment is described by recent surveys of global language providers. EF Education First, in its 2013 EF English Proficiency Index, gave “mainland China 50.77 in low proficiency, 34th of 40 countries worldwide” (p. 7) and Hong Kong “53.54, ranking 22nd” (p. 6). The report stated that China has progressed in its English proficiency, but its adult English proficiency is “still low” (p. 13). In another worldwide study on business English communication proficiency conducted by Global English (2011), a California-based language training service company, the Business English Index (BEI) was developed “to measure Business English communication competence (in the context of real-life business situations and business communication vehicles)” (p. 7). In

the 2013 BEI report, the global average BEI increased to “4.75”. By country, China’s average was “5.03”, which is considered far from adequate (p. 8). These report results indicated a gap between the required English communication standards and the actual English proficiency of Chinese English users.

#### 1.1.2 Issues and challenges in workplace English language training in the global and Chinese context

The 2012 Global English BEI report interpreted the status quo of global business English communication training as follows:

“Traditional training cannot address the gap (in business English communication skills with the workplace needs), as it lacks both scale and context - the ability to be deployed easily across an entire organization and the ability for employees to learn while they work.”

(Global English, 2012, p. 12)

This 2012 Global English BEI report calls for companies to invest in establishing customized workplace English training platform to meet the diverse employee learning needs which may be “a comprehensive curriculum or an instant request for English language support” so that these improved business English communication skills can be translated directly into job

performance and business growth. It also means the construction of a workplace environment conducive for business English communication competence development (Global English, 2012, p. 12).

Nevertheless, previous research in different areas of the globe has also emphasized the challenges in developing and implementing workplace English training programs. In the U.S. context, Vitello (2013, p. 1) indicated that workplace ESOL programs were becoming a “challenging but rewarding business” as a considerable “amount of company time and resources are required to plan, implement, monitor and sustain a strong workplace ESOL program. Workplace ESOL is a long-term commitment and company officials sometimes mistakenly underestimate the time and in-kind costs that operating a quality on-site basic skill training program requires”.

In the provision of Australia’s Workplace English and Literacy (WELL) program, the challenges encountered have included tiredness linked with lower literacy levels, as employees are embarrassed to concentrate on targeted WELL training programs and the decreased provision of WELL programs to smaller organizations due to cost constraints (UNESCO, UIL, 2013).

In Malaysia, according to the study of Yunus et al (2012, p. 402), in order to ensure the efficiency of English language training programs for employees of public and private sectors, the continuing education provider must cope with the challenges of “providing infrastructure for training, training of teaching staff, implementing effective and intensive marketing approaches, employing a competent workforce, providing adequate facilities and offering quality, attractive and accommodating programs that fulfill customer requirements”.

In South Africa, the study of Nchindila (2011, p. 51) has explained why teaching English in the workplace of Africa is difficult. The pressure could be increased by lack of professional English trainers for the workplace context and “effective teaching resources”, adult learners’ attitude to English learning and the pressure from the job, the minor role of English as a second language in Africa. In Botswana, Alimi (2011) indicated the challenges of workplace English language curriculum are derived from the concerns of roles of English, the variety of English being used in the multicultural workplaces and the difficulties in implementing thorough needs analysis.

In the Chinese companies, the English language training has also been problematic. Ipsos MORI (2009), a market research company was commissioned by British Council, also an influential corporate language



training service provider, to conduct a market research report in the Chinese context. The report indicated there was “a low access to in-company English training” though English was seen by employers as an important job skill. It has been reported that in “large organizations” where employees’ English skills are especially important, more workplace English training programs would be provided. These programs adopted various approaches such as “regular internal training on written and oral English, English corners, overseas immersion programs and combined management/business and English training programs”. It has been predicted that in the long term, “work-related English training” in the Chinese context will become more “practical”.

In summary, in the Chinese context, companies have invested in employee *EOP* programs to facilitate the business globalization, in the form of onsite classroom-based training, offsite institution-based training, and alternative methods such as E-learning and blended learning modes identified by global language training providers’ surveys. Are these workplace *EOP* training programs in the Chinese context fully effective? Which training approaches suit contemporary workplaces in the Chinese context? What are the short-term and long-term benefits of *EOP* training in Chinese workplaces? Have they made contributions to business and economic globalization? What other costs and benefits can *EOP* training in the workplace bring? Currently, little is known

about the effectiveness of these workplace *EOP* training programs, especially in the Chinese context. Thus, this study is to address this research gap to contribute to the understanding of training effectiveness in the corporate English training programs of in various sectors and the influencing factors. More specifically, this study aims to:

- Evaluate the effectiveness of *EOP* training programs in Chinese workplaces and explore their benefits to employees' global communicative competence development and business globalization;
- Distinguish the factors that facilitate and hinder effective learning outcomes of workplace *EOP* training programs

## 1.2. Key features of the research

This study synthesizes theories from the fields of *EOP* (business English and vocational English), TESOL, TVET, lifelong learning, adult education, skills development for employability and employment, communicative competence development, workplace training and learning, human capital investment, sustainable livelihoods, and training program implementation and evaluation. It uses a synthesized theoretical framework to interpret *EOP* training and learning activities in the workplace. In particular, the study integrates program evaluation theories and models, based on which a comprehensive evaluation

framework suited to *EOP* programs in the workplace has been constructed for the first time.

More specifically, the effectiveness of workplace *EOP* programs is examined through variables identified from extensive literature review. They include training effectiveness indicators from the short-term and long-term perspectives, factors in program design stage, program implementation stage and vocational context which have been distinguished and analyzed in different workplace *EOP* training programs crossing various sectors in Hong Kong and mainland China contexts. This study consults the practices of effective training programs of multinationals in Hong Kong and mainland China. A model for developing and implementing workplace *EOP* training programs in the Chinese context has also been constructed for the first time.

### 1.3. Significance of the research

In terms of contributions to theory, this study expands the research scope of workplace *EOP* training program evaluation by developing a multidisciplinary framework rather than simply relying on the theories behind *ESP* practice. This approach leads to the development, application and further modification of an evaluation framework for workplace *EOP* training programs. This study also contributes to theory by developing a model of effective workplace *EOP*

training program development and implementation for the Chinese context. This model is replicable in other cultural environments or industrial sectors. These theoretical contributions are both significant and unique.

This study should inform the actual practice of workplace business English communication skills development. The findings of the study include an overview of current *EOP* training program practice and a program development and implementation model in workplace *EOP* training, a comprehensive review of the training approaches suited to Chinese workplaces, and a professional evaluation of corporate *EOP* training programs.

The findings benefit both companies that are developing their training and development strategies and private training organizations that are developing training programs for particular industry and business needs. The study also benefits learners who are seeking business English communication skills opportunities and trainers who are refining their teaching practice in the workplace. The findings in the China context are also comparable with practice in other countries such as the U.S., the U.K. and Australia.

The study reiterates the significance of employee business English communication skills development programs in terms of the benefits to

economic globalization, human capital development, employability, sustainable livelihoods, and lifelong learning in China.

As a policy evaluation at both the national and local levels has been conducted, the findings also inform policy stipulation for corporate employee language training schemes, with the understanding that government, industrial bodies, employer associations, and companies in the private sector should work together to promote workplace language skills development activity.

#### 1.4. Research questions

The study centers on the following two main research questions:

- 1) How effective are *EOP* training programs in preparing employees for global business communication in the workplace?
- 2) What factors contribute to and hinder the effectiveness of *EOP* training programs in the workplace?

#### 1.5. Methodology

Based on the synthesized theories, and the evaluation models of Adamson and Morris (2007, p. 277), Diamantidis and Chatzoglou (2012, p. 890), Hubball and

Burt (2004, p. 54), theories of Kirkpatrick (1950), and Hutchinson and Waters (1987), an evaluation framework for *EOP* programs in the workplace is constructed and applied in analyzing different workplace *EOP* programs in Hong Kong and mainland China.

This study comprises two stages. In the first stage, semi-structured qualitative interviews were conducted with representatives of multinationals from different industrial sectors in mainland China and Hong Kong. Four sets of interview questions relevant to *EOP* training program design, implementation and evaluation based on the evaluation framework were developed to elicit practitioner responses from policymakers, training providers, employers and working adults. This process was chosen because rich information on *EOP* training program effectiveness can be gathered from a variety of workplaces. These have provided contextual information and practical guidelines for workplace *EOP* training program practice. In addition, the workplace *EOP* training programs from diverse Hong Kong and mainland China's businesses are compared in relation to the evaluation framework. Through this comparison, the successful examples from Hong Kong's businesses and the good practices or weaknesses in mainland China's businesses inform the evaluation of particular cases of corporate *EOP* programs in the second stage of this study.

In the second stage study, case studies from three international companies in Wuxi, mainland China were analyzed. The case study research process combined qualitative interviews, surveys, learner assessments, trainer's reflection, documentary study and participant observation. The effectiveness of the programs was examined and the factors that contribute to or hinder the training effectiveness were identified while the benefits of workplace *EOP* training programs in training participants, sponsors and the company were explored. The advantage of using case studies is that they provide quality in-depth information to understand about the issue of training effectiveness and the factors that influence it based on the evaluation framework applied in the workplace *EOP* program context.

#### 1.6. Researcher's credentials

As a PhD candidate, I have hands-on experiences in designing and delivering *EOP* training in the workplace. This practical experience has given me a better understanding of the context and environment surrounding workplace English training. In addition to workplace training, I have experience in and an understanding of tertiary-level business English teaching that has placed me in direct contact with adult students with different disciplinary and industrial backgrounds. My accumulated teaching hours exceed 3000 and they have

proven beneficial in understanding the training effectiveness of workplace *EOP* programs in different but specific contexts.

Academically, my M.Sc. in Management of Training and Development has equipped me with vital workforce training and development knowledge, and human resources development experience which bridge the gap between language training experts and industrial practitioners. I have also participated in conferences, seminars and workshops on Technical and Vocational Education and Training (TVET) in addition to extensive reading, which have provided great channels for TVET theories and enabled a cross-disciplinary study of workplace *EOP* training from the evaluation perspective. My academic background facilitates this comprehensive study of the area, the first of its kind in the field.

### 1.7. Overview of chapters

This thesis has 13 chapters. In Chapter 1, the Introduction provides the study background, its significance and the central research questions. In Chapter 2, the theoretical framework synthesizes theories from *ESP*, individual differences in second language acquisition, TVET, adult education, sustainable livelihoods, human capital investment, lifelong learning etc. This forms the foundation of



the conceptual framework, which guides further research. In Chapter 3, the major theories and methodologies of training program evaluation are outlined to develop the workplace *EOP* training program evaluation framework. Chapter 4 explains the cultural and socioeconomic context of the study, raising such topics as English in Hong Kong and mainland China, English in TVET in mainland China, the strategic importance of English learning to Chinese adults, Hong Kong and mainland China's English language, TVET and continuing education policies, and workplace *EOP* training and learning research in Hong Kong and mainland China, which serve as a comprehensive overview of previous research in workplace *EOP* training and learning in the Chinese context. In Chapter 5, the two stage study and the comprehensive research instruments adopted in the study are introduced and the theoretical principles of data analysis, including findings of pilot studies, are presented. Chapter 6 presents the results of the first stage study on the challenges of workplace *EOP* training programs and proposes solutions. Chapter 7, 8 and 9 present the findings of case study 1, 2 and 3 using the evaluation framework as the analytical map to answer the research questions. In Chapter 10, the findings are discussed in relation to the theories studied and the two stages are compared. Chapter 11 concludes by summarizing the findings, discussing the strengths and weaknesses of the evaluation framework, proposing guidelines for developing

workplace *EOP* training programs, raising the limitations and implications of the research and suggesting areas for further study.

#### 1.8. Chapter summary

This chapter provides the context in which China's current workplace English proficiency level is evaluated. Workplace *EOP* training is in great demand, but is not sufficiently effective in solving the international communication problems. The aims of this thesis, as previously stated, are to evaluate the workplace *EOP* training programs, identify the factors that facilitate or hinder their training effectiveness and explore their benefits. The significance and key features of this study are to construct an evaluation framework, bridge the gap in professional practice and facilitate policies promoting workplace *EOP* training and learning. This chapter provides two clearly focused research questions and researcher's credentials are presented along with an overview of the chapters.

## CHAPTER 2

### THEORETICAL FRAMEWORK

In this chapter, a multidisciplinary theoretical framework relevant to workplace *EOP* training program development and implementation that serves as the foundation for this study is constructed. The issues of workplace *EOP* training program evaluation would be informed by theories from the relevant fields of *ESP* program development and implementation, teaching job-related ESL in the workplace, second language learning, second language teaching, learner autonomy, business management training, communicative competence development, technical and vocational education and training, workplace language and literacy development, skills development for employment and employability, adult education, lifelong learning, human capital development and sustainable livelihoods. This is the first study of its kind to construct a theoretical framework on a comprehensive theoretical basis, which is multi-disciplinary. This theoretical framework can inform the development of evaluation framework in Chapter 3 and serve as foundation for result interpretation in the chapters onwards.

## 2.1. Defining *EOP* training programs

2.1.1 Features and categorization of *EOP* To evaluate the effectiveness of workplace *EOP* training programs, the specific nature of English use in workplaces should be defined. The characteristics of *EOP* are first discussed under the umbrella of *ESP*, *LSP* and *VESL*, which are relevant to *EOP* and bear similar curriculum features. As little research has been done that directly uses the term *EOP*, this thesis also reviews the literature from previous studies that use these other relevant terms.

*English for specific purposes (ESP)* can be defined as “English as a second or foreign language where the goal of the learners is to use English in a particular domain” (Paltridge, 2012, p. 179). According to Basturkmen (2010, p. 55), *ESP* courses range from “low to high specificity”. It can be as wide as the title “Business English” indicates or as narrow as “English for Financial Auditors at Xco.” As a branch of *ESP*, *EOP* serves English language needs related to workplace occupations and can be further classified into *English for business purposes (EBP or business English)*, and *English for vocational purposes (EVP)*, or *vocational English as a second language (VESL)* (including *pre-vocational English* and *vocational English*). The emphasis is on the nature of English learning as direct preparation for the world of work, meeting “specific vocational needs such as [for] airline pilots, police, and bank clerks”

(Dudley-Evans and St John, 1998; Hutchinson and Waters, 2002; Robinson, 2000; Basturkmen and Catherine, 2005; Savignon, 1983, p. 125). Moreover, the most recent review of *ESP* teaching as an area of study by Basturkmen (2010, p. 6) further classified *EOP* into *English for general occupational purposes* such as “English for hospitality industry” and *English for specific occupational purposes* such as “English for hotel receptionists”.

Meanwhile, in the U.S. context of teaching VESL to limited English proficient (LEP) learners, VESL can be classified into “general employment VESL”, “occupational or job-specific VESL” and “occupational cluster VESL”, with differentiated learning purposes and proficiency levels (Lopez-Valadez, 1991, p. 16). Moreover, Smith (1986) indicated regarding teaching job-related English as a second language, there are 15 areas in which a foreign language plays an important role, including “banking, communications, construction, food service, health care, hotel, nursing, office, recreation, retail and wholesale, social service, transportation, travel and tourism” (p.8).

According to Boiarsky (1997), the U.S. workplace has been transforming since 1990s into a “communication intensive” environment in the manufacturing industry and medical and banking services. Employees have been required to conduct more communication tasks in meetings and team activities. This has

generated demands for workplace English teaching and learning to meet the new workforce communication requirements. “Workplace English” is thus defined as “the form of communication used outside the academic classroom” (p. 17). The purpose of workplace English curriculum is to transcend the conventional English by “providing the literacy skills necessary for reading and writing the documents”. Moreover, it has also been stated that workplace English covers much broader areas than business English including for “reading, understanding, interpreting, evaluating and communicating information in technical and scientific fields as well as in journalism and public relations”. Workplace communication activities require employees to possess the ability to use English in “context-specific environments” in all kinds of written and oral communication activities and across modern telecommunication channels (p. 18). More specifically, written and oral communication in the workplace produces business and technical communication documents of different genres, compared with traditional English and academic English. In addition to the required language skills, Global English (2011) invented a term “enterprise fluency”, defined as “the communication, collaboration, and operational proficiency companies must have” in the international business context, of which “the ability to communicate effectively in English in any business situation” is an important

element (p. 2). These definitions add depth to our understanding of *EOP* in the workplace context.

Moreover, *EOP* can be also replaced with the terms “E4W (English for Work)” and “E4WP (English for the Workplace)”. However there is differentiation in the use of the terms in different geographical areas. In the U.K. context, “ESOL for work” is associated with “less skilled professions, such as drivers, catering staff or tourist workers” while “E4W” is linked with “highly skilled professions such as bankers, lawyers, engineers”. In other geographical context, there may not be such clear distinction in the use of the terms (Krzanowski, 2011, p. 1).

In this study, *EOP* is selectively focused on *EBP* and *EVP* or *VESL* training in the workplace context. Different businesses adapt training programs to meet employees’ levels of English use in both business (sales, human resources, accounting, international trade, management functions) and vocational (technical, engineering, product design functions) contexts.

### 2.1.2 Nature of *EOP* programs

Understanding the nature of *EOP* programs is critical for this evaluative study. In terms of historical developments, *EOP* course trends involving writing (such as commercial correspondence) can be traced back to the 1960s. In the 1970s

and 1980s, the focus shifted to “spoken interactions” (including skills such as “active listening, questioning, one-on-one spoken interactions, multi-person spoken interactions, oral presentations”) related to “commerce, secretarial, and business” areas. In 1972, four skills were given full attention: listening, reading, writing, and speaking. In the 1980s, the “business studies approach of case studies and project work” were introduced in teaching *EOP*, and since 1987, *EOP* publications have covered “business communication skills” including socializing, telephoning, meeting, presentation, and negotiation extensively. Since the mid-1980s, the teaching of *EOP* has been broadened from teaching language to the business world, to incorporate perspectives of “behavioral skills” and “management training approaches and methods integrated with language training techniques”. Consideration should also be given to the evolution of workplace with more advanced communication technologies such as “telecommunications, computer network, email and videoconferencing” (Dudley-Evans and St John, 1998, p. 28).

As a large proportion of learners are adults at work, some *EOP* courses conducted at workplaces combined language and job training (Robinson, 2000). In light of this tendency, researchers tend to introduce the context of language use and see the programs as an approach to dealing with the needs of specific occupational contexts, including those for hotels, offices, insurance agencies,



industrial bases and banks. The *EOP* programs target occupational settings, such as English for pilots, nurses, economists, lawyers, restaurant managers, automobile mechanics and tourists (Savignon, 1983, p. 124); English communication at open-plan offices, assembly lines, construction sites, design studios (Michler and Welt, 2009); customer service, order processing, financial, sales, merchandizing and software development departments (Smith, Towara and Frendo, 2009); insurance companies (Bartoszak, Fensel, Krabbe, Mordant, Purvis, 2009); and participation and performance in international business meetings in the European context (Rogerson-Revell, 2008).

In the broad field of *Language for specific purposes (LSP)*, which also informs workplace *EOP* training programs, teaching English courses has generated a variety of practical cases which aim to improve “communicative needs of speakers of a second language in the particular workplace, academic, or professional context”. Typical examples include the language courses offered at universities or those for “engineers” or “nurse” either before or after their job commencement (Basturkmen and Catherine, 2005, p. 672). Basturkmen (2012) suggested compared with research of *English for Academic Purposes (EAP)* in the university context, workplace related *LSP* studies are limited with a few highlighted projects in New Zealand and Germany, due to the issues of restriction on access to the research sites and corporate confidentiality. The

focus of workplace related *LSP* studies should be on the “features of the course, learners’ contribution to the *LSP* programs with their professional knowledge and experience, the change of teacher’s roles and course content” (p. 68).

Hyland (2009) summarized that the teaching of specific programs is based on an understanding of the “language and discourse features of the target groups, the communication skills used and knowledge about learners” (p. 201). The development of *LSP* Programs also follows existing theories such as those discussed in Mackay and Palmer (1981). The *LSP* program development process can be divided into the following stages: “pre-program development stage” mainly in “educational decision-making”, “program development stage” including stages of “information gathering, goal specification, production, teacher training, trial, program maintenance and quality assurance” (Mackay, 1981, p. 3-4). According to Mackay (1981), *LSP* programs focus on the teaching of “language skills, specialized content and functional skills” (p. 13). The specific information is gathered in the needs assessment stage. The program design (Bachman and Strick, 1981), methodology selection (Phillips, 1981) and formative program evaluation (Bachman, 1981) hinge on the information gathered in the needs assessment stage so that the *LSP* programs satisfy employees’ needs. The theoretical and practical development in *LSP*, *EBP*, *VESL* and workplace English courses all have implications for the

workplace *EOP* curriculum. *EOP* training in the workplace context provides wider coverage of the communication skills needed in specific 21st century businesses and industries.

## 2.2. Course design of *EOP* training in the workplace

### 2.2.1 Course design principles

*ESP* course design incorporates factors which influence the training process.

Hutchinson and Waters (1987) indicated that the factors included “what (language descriptions and syllabus), how (learning theories and methodology), who, why, where and when (needs analysis and nature of particular target and learning situation)” (p. 22). Relevant theories underpin the *ESP* course design.

For example, Dudley-Evans and St John (1998) raised the issues of “parameters of course design” on the following questions in the specific course context.

They are:

“Should the course be intensive or extensive?

Should the learners’ performance be assessed or non-assessed?

Should the course have a broad or narrow focus?

Should the material be common-core or specific to learners study or work?” (p.

145)

*ESP* course designers make decisions while designing the course themselves, or consult students and program stakeholders. Teachers can play the role of facilitators or instructors in different contexts.

To answer these parameter questions, *ESP* course design issues must be addressed. According to Basturkmen (2006), these include the variety of language taught in *ESP* programs, depending on needs analysis results and course objectives; whether it should be general content or specific to context; whether it should be “narrow- or wide-angled course design”, depending on the information gathered from the needs analysis; and whether the training needs are limited or more general (p. 15).

Cheng (2011) indicated that due to the influence of “language and context specificity”, the basic considerations for teaching and learning of *ESP* should include “learning objectives, input materials and output activities, methodologies, social milieu and assessing student learning” (p. 63). All of these elements interact within the overall program design process.

Relevant research on evaluating the course design has covered various aspects of the area. In Chostelidou’s (2011) latest study, needs-based course design is used effectively, implying that specific workplace situation and learner

characteristics including language aptitude and English proficiency can guide a trainer's selection of content, materials, activities, and training methods. In the Hong Kong context, the syllabus design has indicated an "integrated approach" to course planning which combines "needs-based, task-based, content-based and text-based" approaches that encourage pedagogical change by raising awareness of "workplace practice" (Flowerdew, 2005, p. 137). The theoretical work on course design has provided the foundation for evaluating workplace *EOP* program design effectiveness.

#### 2.2.2 The importance of training needs analysis for *EOP* programs in the workplace

Training needs analysis is a key element for workplace course design. In *EOP* courses, needs analysis which includes "description of language use in the target situation" is generally considered a key feature. The information gathered through such analysis includes "language use of professional or vocational groups", "the linguistic skills required" and the "difficulties" in learning. A thorough needs analysis enables the *LSP* course instruction to be "efficient, effective and motivating to learners" (Basturkmen and Catherine, 2005, p. 673).

Regarding corporate training, the literature indicates the necessity of needs assessment and re-assessment models to identify “training deficiencies” and “training excesses” in conditions such as “performance problems, introduction of new technologies, habitual training with no need in mind and needs assessment in ongoing training programs”. The assessment and reassessment of training needs are also important to “upgrade the existing training program” and meet the assessed needs through “instructional and non-instructional interventions” (Tessmer, McCann and Ludvigsen, 1999, p. 86). For workplace training programs, training needs analysis is usually the first step of data gathering. In light of the recognized characteristics of *EOP* teaching and course design, the needs analysis can start with questions such as: Why does the student need to learn? Who is to be involved? Where does the learning take place? and What does the student need to learn? (Hutchinson and Waters, 2002).

Dating back to the 1970s, needs analysis (NA) in *ESP* has been used to identify the target language needs by asking questions about communication variables such as the topic, the participants and the media. The target needs are then developed into an analysis framework by probing further, with questions such as: Why is the language needed? How will the language be used? (channel, medium, text type) and Where will the language be used? (Cowling, 2007;

Hutchinson and Waters, 2002) Robinson (2000) described needs analysis in terms of target situation analysis (*TSA*) and present situation analysis (*PSA*) to highlight the differences between the learners' pre-training capabilities and post-training results. As *ESP* courses are closely targeting language learning needs, *TNA* is crucial in deciding the course content and linguistic features of the language for specific needs. More recently, Paltridge (2012) further identified needs analysis as an important part of course design in that it triangulates information such as "necessities, what the learner needs to know and can do to function effectively in the target situation, lacks, the gap between target and existing efficiency and wants, learners' views of what they need". Various methods such as "surveys, interviews, questionnaires and assessment" can be used to validate the needs analysis findings (p. 180).

In *EOP* needs analysis, in which the training is directly targeting occupations and workplaces, the 'where' questions are critical, as they relate to the language context and setting such as office, hotel, workshop, meetings, telephones, or the linguistic context (Hutchinson and Waters, 2002). In business English training, most of the courses are preceded by needs analysis which includes "interview with in-company course coordinator", managers, students and "placement testing", to gather information about learning needs, corporate development goals and managerial expectation (Donna, 2000, p. 12). A comprehensive needs

analysis for workplace English training program also involves implementing job analysis for managers, technical staff and secretaries, and department analysis for production, finance, information technology and human resources, which have different communication needs. Performance scales are defined before training and information gathering can ensure that the training suits targeted needs (Ellis and Johnson, 2002). NA can also be called “linguistic auditing” in which systematic methods are used to understand the organizational communication needs related to different tasks conducted by various post holders. A communication needs map can be drawn for a better understanding of the *EOP* learning needs (Reeves and Wright, 1996). NA for workplace training programs is well-rounded, with learners’ learning styles, trainers’ teaching needs, business needs and organizational communication needs (Frendo, 2008) gathered to form a big picture of workplace *EOP* training objectives. This type of NA combines both “objective assessment of communicative demands” and “subjective views” from both “language and non-language professionals”. The latter offers different perspectives for *EOP* practitioners to reconcile (Basturkmen and Catherine, 2005, p. 676).

Needs analysis research is also getting international. It is indicated that the frequent focus is on the areas of “business communication, legal English and healthcare”, which depends on the data accessibility. A few relevant case and



comparative studies of various workplace English training programs in Europe (Rogerson-Revell, 2007) and Japan (Cowling, 2007) have revealed that workplace *EOP* training needs, which consist of course content, schedule, learners' learning styles and the available resources are critical in helping trainers decide on appropriate *EOP* training approaches. Case studies identifying the communication patterns and skills needed were conducted earlier in relation to "domestic aides in West Asia" through conducting systematic job, situation and communicative activities analysis for *EOP* curriculum design (Cumaranatunge, 1988), and later in connection with interpreting business communication in interactions between mainland Chinese and Western firms through Hong Kong Chinese intermediaries (Trimarchi and Liesch, 2006).

Meanwhile, "description of language use" is another important feature for *LSP* (Basturkmen and Catherine, 2005, p. 674). The central theme describing *LSP* relates to the "discursive complexity and variation in different language groups" and the specificity of language use in various contexts (Hyland, 2002 in Basturkmen and Catherine, 2005, p. 675). Applied linguists have been productive in generating discourse landscapes for the use of English in different occupations, industries and cultures such as "corporate culture and the use of written English within British subsidiaries in the Netherlands" (Nickerson,

1998), land surveyors in Hong Kong (Cheng and Mok, 2008), international construction industry with Japanese and Hong Kongese onsite communication (Handford and Matous, 2011), textile clothing industry in Hong Kong (Li and Mead, 2000), information technology service companies in Brazil (Ramos, 2011), English use in the workplace survey in Finland (Kankaanranta, Louhiala-Salminen, 2010), in Hong Kong (Evans, 2010; Chew, 2005; Forey and Nunan, 2002; Forey, 2004), creative English use in the public relations industry in Hong Kong (Peirson-Smith, Bhatia, Bremner and Jones, 2010). These studies have provided important references in specifying general training needs in certain occupations and industries, at both the entry and senior levels, which can inform workplace English curriculum design and teaching practices. For instance, in the Philippines, a recent language audit and needs analysis of call center business for a global financial services company has informed the design and implementation of the *ESP* curriculum. The research-based approach is recommended for designing syllabi and tailoring programs to industrial needs (Lockwood, 2012).

*EOP* programs in the workplace feature a curriculum that is more learning centered than learner centered. The latter has been discussed in the works of *Focus on the language learner* (Tarone and Yule, 2000) and *Learner-centered curriculum* (Nunan, 1988; Hutchinson and

Waters, 2002; Donesch-Jezo, 2011). The learning-centered approach to *EOP* is designed to meet learners' special needs, with "ways of describing language, models of learning and needs analysis" forming a foundation for course design. It has also been recognized that materials, syllabi, methodologies and the role of trainers as "resources or orientations" all contribute to the effectiveness of the *EOP* training program. Moreover, the teaching of *EOP* fits into the principles of second language learning, which can assist teachers and training program designers in better tailoring the program to learner's individual differences and specific learning context (Hutchinson and Waters, 2002, p. 3). The following section 2.3 particularly reviews previous studies from the perspective of teaching job-related English as a second language.

### 2.3. The perspective of teaching job-related English as a second language in the workplace context

Adult second language acquisition in U.S. and Australia has provided successful implementation guidelines that can be applied to teaching *EOP* in China's workplace training programs. These guidelines are based on second language development theories and principles.

In the U.S. context, in the 1990s, a large proportion of adult ESL teaching is conducted in the workplace, which reflects the increasing needs of English training for employability, whereby employers organized English training in order to “maintain productivity and the health and safety of the workforce on the job” (Orem, 2000, p. 444).

In the Australian context, Nunan and Burton (1989) proposed a “curriculum framework for adult second language learners for teaching English in the workplace”. The curriculum design process involves steps of “needs analysis of learners and the workplace, setting goals, developing course outline, selecting materials and activities, ongoing assessment and evaluation” (p. 6). This forms a consistent whole when developing spoken or written communication programs for employees. Baylis and Thomas (1994) developed a competency framework for English in the workplace training by systematic assessment of workplace language proficiency and identification of training needs. Competency-based workplace English training is proposed. This study indicated that “language background, educational background, experiences of language and literacy training and work experience” would have impact on employees’ job performance (p. 43).

For adult ESL learners with limited English proficiency (*LEP*), to give an example, a sequence of training programs linking “beginning/intermediate ESL, pre-employment VESL, and job” has been designed to enhance learner job readiness in an English-speaking workplace, while vocational training in other subjects has provided support services to aid job preparation (Gillespie, 1996, p. 69). Workplace communication topics in these programs have centered on specific occupational settings in which effective literacy skills are required, such as “job-specific terminology, cross-cultural factors, following directions and instructions, and company organization and culture” (Gillespie, 1996, p. 123).

In Friedenbergs (1995) study on “vocational and language development of limited English proficient adults” in the context of the U.S. employment and labor market, workplace education programs were categorized as private business and industry-based training. Three types of “workplace education programs” were mentioned: “low intensity programs, quick fix programs and lifelong learning” (p. 34), which aimed at developing work-related English skills. Friedenbergs (1995) stated on the issues of “instructional delivery system” for *LEP* adults in the workplace. “Bilingual education, multilingual instruction” using strategies of “bilingual peer tutor, interpreting oral instruction and translating written instruction” were used (p. 44). Language development for

*LEP* adults should follow second language acquisition theories and take into account “actors influencing language acquisition”. “Second language development techniques”, including traditional approaches (“audio-lingual method, grammar-translation method”) and “communicative approaches” (“community language learning, natural approach, total physical response”), formed the theoretical basis for the instructional delivery model for *LEP* adults in the workplace (p. 51).

Lopez-Valadez (1991) emphasized the role played by Vocational English as a Second Language (*VESL*) in vocational services for *LEP* adults in TVET programs, which specifically “addresses the occupational-related language needs of *LEP* persons”. In this context, “vocational or employability concepts” are reinforced and it is still recognized that the goal of learning is English (p. 16). In addition, in the program context of teaching job-related ESL to *LEP* learners (Sally, 1994), a standard procedure was devised to gather student information and job descriptions before program implementation. Performance objectives were drawn based on the specific tasks required for each job, which required related ESL proficiency on *LEP*. Job specific terms and language functions were also drawn in a systematic process.

In a study conducted by the U.S. National Literacy Program and Lake County College, workplace ESL competencies were identified and specified in particular corporate training programs (1994), including “describing products and materials orally, summarizing or repeating oral instructions, asking and answering simple questions”, in conjunction with the competencies of math and reading (p. 27).

Furthermore, Grognet (1997) proposed the integration of employment skills preparation and adult *ESL* instruction. The linguistic skills required for workplace instruction, such as verbal communication (expressing opinions both in writing and speaking), were placed in a broader framework of workplace skills including “resource management, information management, social interaction, technology utilization” (p. 4) on the basis of three foundation skills i.e. “basic skills, higher order intellectual skills and motivational or character traits” (p. 5). Workplace ESL instructors then have to address the skills by integrating related project activities based on their understanding of workplace communities.

Moreover, Gillespie (1996) linked adult second language acquisition in the workplace business and industry to the theoretical fields of “vocational services for *LEP* adults, collaboration of instruction in the ESL context, studies of

linguistic demands at the workplace and studies of problem solving at the workplace” (p.50). Issues regarding “new approaches to instruction” were raised, including the “exploration of communicative competence development, communicative language teaching, *ESP* teaching approach and new understanding of language proficiency” (p.61).

Newer directions of workplace *ESL* training from U.S. have continued to address the “complexity and community” by identifying good workplace *ESL* training practice patterns which use different approaches such as “reflective communities, meetings, forums”, and onsite English language coaches to achieve the learning outcome which effectively “integrate *ESL* learners with the community of work” (Brooks, 2009, p. 71).

The principles and theories in the previous studies of teaching job-related *ESL* in the workplace can inform the effective *EOP* program delivery for business and industry. The value of studying theories in related fields has also been indicated in the previous studies in various cultural contexts to inform the study on the effectiveness of *EOP* training programs in the workplace.



## 2.4. The perspectives of second language learning in the context of workplace

### *EOP training*

Second language learning theories play important foundational role for this study. For example, Hyland (2009) suggested that *LSP* program development is supported by second language learning theories. The goal in classical second language learning theories is to “acquire various aspects of communicative competence” including “linguistic, discursive, pragmatic, sociolinguistic, and sociocultural competence” (Littlewood, 2004, p. 503). In addition, second language learning theories on “communication in competence” emphasized that communicative competence is “dynamic”, with both “written and spoken language, context specific” which requires “appropriate choice of register and style”, different from “performance” and depends on the “cooperation of all the participants” (Savignon, 1983, p. 8).

In the context of workplace, communicative competence is viewed from both verbal and non-verbal perspectives as well as in the cross-cultural context, as demonstrated in the studies on “the process of marketing negotiations” (Graham, 1990) and “interethnic communication” (Gumperz, 1990). In TVET, the global business communicative competence can be translated into “technical and professional competencies” such as “negotiation skills, problem-solving

and inter-cultural competencies” (Maclean and Wilson, 2009, p. xcix). In workplace *EOP* learning, the goal is for learners to acquire linguistic knowledge, including vocabulary, grammar, semantics and phonology in English business communication, generate professional communication discourse, and use language appropriately in business situation and in cross-cultural business communication such as international negotiation, telephoning, and presentation.

The second language acquisition literature has identified various factors which influence the effectiveness of second language instruction including the “types of second language instruction, such as form-focused instruction versus meaning-focused instruction, different types of learners and different types of language features” (Graaff and Housen, 2009, p. 726). The type of second language instruction is reviewed in section 2.6. The language feature is defined mainly in section 2.1 and after as the special kind of communicative skill used in international communication contexts. This section 2.5 on individual difference factors in second language acquisition reviews different types of learner factors assessed by specific research instruments. These factors have been categorized into “abilities” (“language aptitude”), “propensity” (“learning style, motivation, personality”), and “learning strategies”. Obviously, these factors also influence the learning outcomes of workplace *EOP* training

programs. Whether to include “age” as a factor to differentiate young learner and adult learner which could influence the second language learning outcomes remains controversy in the field (Ellis, 2004, p. 528). Factors which can influence adult students’ English learning outcomes also include language aptitude, personality, attitude, motivation and gender (Hou, 2008). The following subsections focus on the factors that boast closer links with individual differences in mature-adult *EOP* learning methods in the workplace.

#### 2.4.1. Learning strategies

Broadly, as instructional resources, learning strategies are categorized into “supportive strategies” which improve learner’s “motivation, attitudes” and “affect” (emotional factors such as anxiety), “acquisition or process strategies” including the “selection strategy, organization strategy, elaboration strategy, repeating strategies, personalization and control strategies” (including planning, self-control and assessment) and “meta-cognitive strategies”, which require corresponding teaching strategies (González-Pienda, Bernarido and Roces, 2008, p. 91).

Oxford (1989a) developed the *Strategy Inventory for Language Learning (SILL)* as an instrument to analyze the strategic use of learners from different

backgrounds. Since then, *SILL* has been adapted for *EFL/ESL* learners and adult learners of different cultures. Oxford (1989b) indicated that “language learning strategies can be assessed in a variety of ways, such as diaries, think-aloud procedures, observations, and surveys.” Research “frequently shows that the most successful learners tend to use learning strategies that are appropriate to the material, task, their own goals, needs, and stage of learning”. Language learning strategies can be categorized into “direct strategies” that include memory, cognitive, and compensation strategies and indirect strategies that include “meta-cognitive, affective, and social strategies”. In the intensive English learning program in the U.S., Hong-Nam and Leavell’s (2006) study on 55 *ESL* students coming from different cultural backgrounds found that intermediate level of learners prefer to use second language learning strategies, more with meta-cognitive strategies and less with affective and memory strategies. Language learners with more use of learning strategies progress are faster in improving language proficiency. In the Chinese context, Jiang and Smith (2009) found through “cross-generation interview based study” that Chinese way of learning *ESL* is through “repetition and memorization of vocabulary, word association and use of Chinese pronunciation and memorization” (p. 286). Learner strategy training is becoming important for teachers and policymakers to pass language learning strategy information on to students.

Later, Oxford and Ehrma (1995) studied the relationship between “language learning strategies” and “proficiency, teacher perceptions, gender, aptitude, learning style, personality type, ego boundaries, motivation, and anxiety” in an adult “intensive foreign language program in the U.S.” (p. 359). Liyanage and Bartlett’s (2013) recent study found the predictive relationship between personality and language learning strategy. Liyanage and Bartlett (2011) also found that language learning strategy preferences differed between male and female learners. Oxford and Ehrma (1995) emphasized that “successful language learners” select a range of language learning strategies to meet their own “learning style and personality” needs and to meet “the demands of the task (in the context of cultural influences).” They further stated that “optimal learners find ways to tailor their strategy use to their individual needs and requirements; they develop combinations of strategies that work for them” (p. 362). The findings of second language learning strategies are applicable to the workplace *EOP* training context.

#### 2.4.2. Learning styles

The second language learning styles are also important factors that affect the outcomes of workplace *EOP* learning. Trainers in language programs should

have a full knowledge of learning style issues. In second/foreign language literature, Oxford (1989b) particularly indicated the importance of “learning style” in deciding the success of language learning. Categories of learning style can take the form of the classic “field independence versus dependence, analytic versus global processing, cooperation versus competition, and tolerance for ambiguity”. There could also be learning-style inputs from psychology, including “extraversion versus introversion, sensing versus intuition, thinking versus feeling and judging versus perceiving”.

Learning styles can be scientifically assessed using various instruments such as the *Learning Style Profile* of Keefe et al. (1989) for secondary school principals, the *Perceptual Learning Style Preference Questionnaire* of Reid (1987 in Davies and Elder, 2004, p. 528), which evaluates both “perceptual learning styles (visual, auditory, kinesthetic, tactile) and social styles (group and individual)” in the second language learning process, and Oxford’s (1993) *Style Analysis Survey* for assessing foreign language learners’ learning and working styles in terms of their approach to the dimensions of “study, work, people, tasks, possibilities, and ideas”.

Meanwhile, as a basis of workplace training and learning, Kolb and Kolb’s (2005) learning style inventory contributed to the understanding of

learner-centered approaches. It is grounded on the concepts that “learning is best conceived as a process, not in terms of outcomes and learning results from synergetic transactions between the person and the environment” (p. 2). Kolb and Kolb (2005) indicated that there are individual differences in the learning styles, i.e. “diverging, assimilating, converging, and accommodating”. This is in line with the experiential learning cycle, which includes “concrete experience, observation and reflections, formation of abstract concepts and generalization and testing implications of concepts in new situation”. The selection of learning styles is affected by variables such as “educational specialization, professional career, current job role and adaptive competencies” (p. 3).

A group of recent studies have applied language learning strategies and style theories to studying effective language learners at the university level (Wong and Nunan, 2011) or university students’ major learning style preferences (Psaltou-Joycey and Kantaridou, 2011), which have empirical statistical findings. In the workplace *EOP* training program context, it is important to examine whether the trainer’s teaching strategies match the learner’s learning style and strategies and whether an understanding of students’ learning styles and strategies contribute to the effectiveness of the training programs (Kim, 2008). Second language learning style of learners would be an important area for empirical investigation for workplace *EOP* training programs.

### 2.4.3. Motivation

The second language learner motivation belongs to the “affective factors” which are more “adaptable than learning style” and can influence the learning outcomes (Ellis, 2004, p. 536). Affective factors in second language learning also include "self-efficacy, tolerance of ambiguity and anxiety" (Ehrman, Leaver, and Oxford, 2003, p. 319). Motivational factors in second language learning are often associated with learner attitudes. Gan Z. D. (2011) and Gan Z.D., Humphreys and Hamp-Lyons (2004) indicated that successful adult language learners are “active in the task of language learning, use the language for communication and interaction, and manage their own affective difficulties with language learning” (Naiman, Fröhlich, Stern, and Todesco, 1978 in Gan Z. D., 2011, p. 68).

For adult learners in the workplace, the motivational factor which explains why they join an *EOP* training program is especially important. Here, relevant definition of motivation for second language learning includes “extrinsic and intrinsic motivation”. Extrinsic motivation is related to “factors external to the individuals that motivate them to respond, such as high grades, praise or money” while intrinsic motivation is related to “factors internal to the



individuals that are rewarding in themselves without the need for incentives, e.g. self-esteem” (Jordan, Carlile, and Stack, 2008, p. 157). In the area of second language learning, motivation is categorized into “integrative (positive attitude toward the foreign culture and a desire to participate as a member of it)” and “instrumental (goal of acquiring language in order to use it for a specific purpose, such as career advancement)” (Ehrman, Leaver, and Oxford, 2003, p. 319).

Empirical experiences from workplace *EOP* training programs indicate that workplace adult learners are highly motivated intrinsically by professional development and career growth and extrinsically by financial incentive and promotion within the organization. They are positive toward foreign-language learning and instrumental as learning *EOP* in the workplace can help them work more effectively in the medium of English when they interact by telephone, face-to-face, or in a meeting.

#### 2.4.4. Personality

Personality, one of the affective variables, is considered a key factor in explaining individual differences in second language learning. There are a number of personality variables under investigation, including “risk-taking,

empathy, and inhibition”. The personality variables that have received the greatest attention are extraversion and introversion, which are considered to have positive effects on second language learners’ interpersonal skills (Ellis, 2004, p. 541).

Personality, as it relates to language learning, can be measured by *Eysenck Personality Questionnaire* (EPQ) (Eysenck and Eysenck, 1964). Gan Z. D. (2008) studied the relationship between extraversion and students’ oral performances using EPQ to assess the degree of students’ extraversion. The finding is extroverted learners tend to “play an important role in initiating and sustaining the conversation” (Gan Z. D., 2008, p. 36).

In a study on second language learning strategy use, Oxford and Ehrman (1995) indicated that adult learners with different personality types tend to adopt different learning strategies. Extraverts use “affective and visualization strategies” and introverts use “strategies to communicate meanings” (p. 362). For *EOP* training in the workplace, individual adult learner personality types clearly affect their learning strategy selection, learning styles, and autonomous learning readiness.

#### 2.4.5. Language aptitude

Language aptitude is synthesized by “phonemic coding ability, grammatical sensitivity, inductive learning ability, and rote learning ability”. It is associated with “intelligence and memory”, often evaluated in the language aptitude test (Ellis, 2004, p. 530).

Learners’ pre-course language aptitude levels can influence their learning outcomes. Robinson (2002) in his study discussed the effects of individual differences in “intelligence, aptitude and working memory” on adult incidental second language learning, including both implicit and explicit learning. “Explicit learning has greater variance than implicit learning” while “incidental learning is unaffected by individual differences in aptitude and awareness” (p. 259).

For workplace *EOP* training programs, participant language aptitude in the international business communication context is an important variable for consideration in the curriculum design. Trainers have to design workplace *EOP* programs based on their knowledge of the learner’s second language aptitude, which can be assessed by context-specific language aptitude tests.

#### 2.4.6. Occupational specialization and work experiences

Various *EOP* studies suggest that workplace *EOP* trainers should consider that a learner's professional knowledge is an important source of information. A strand of research has focused on a "subject specific approach" for teaching people in engineering and science (Dlaska, 1999), aviation (Wang, 2007), and nursing (Suliman and Tadros, 2011).

To guarantee that workplace *EOP* training targets occupation-related needs, occupational analysis is recommended (Duenk, 1993). Workplace *EOP* trainers can then gain better knowledge of the specific industry and occupation in need of language training.

In addition, workplace *EOP* learners are often differentiated and grouped into categories of "pre-experience, low-experience, and job-experienced" learners. Job-experienced learners are vividly depicted as having "precise objectives", "being highly aware of time", being experienced in "the world of business", and having a different level of aptitude. In practice, this requires trainers to be "flexible" and pragmatic in order to overcome learner characteristic barriers (Ellis and Johnson, 2002, p. 15). As this study focuses on *EOP* training in the

workplace context, most of the learners are adults who have work experience.

They belong to the category of job-experienced learners.

## 2.5. The roles of teachers in workplace *EOP* training programs

### 2.5.1. Teacher planning and course objectives

The role of the *EOP* trainer in the workplace is to “work with highly motivated, disciplined, intelligent and dynamic learners”. To meet specific goals and objectives, teachers need to have “a tight control of the course plan and careful selection of materials and activities” (Ellis and Johnson, 2002, p. 25). In this context, teachers are expected to have the knowledge of the target language setting and attend teacher training where possible (Paltridge, 2012).

The teacher planning for the course is usually explained through the syllabus or outline. They are designed to communicate to training participants the “plan of action for the course and the cognitive map shared with students” (Tokatlı and Kesli, 2009, p. 1491). Teacher plans for *EOP* training programs are usually based on needs analyses, occupational analyses and employer interviews. The course objectives are then devised, targeted at specific learner needs for business communicative competence development (Edwards, 2000).

Broadly, the objectives in teaching *ESP* courses can be described as “to reveal subject specific language use, to develop target performance competencies, to teach underlying knowledge, to develop strategic competence and to foster critical awareness” (Basturkmen, 2006, p. 133). For *English for business purposes* courses, performance objectives are particularly important which include “an awareness of appropriate language and behavior for the cultures and situations, confidence and fluency, language accuracy and clarifying and checking information”. The course plan for teaching Business English as a type of *EOP* program incorporates “language (vocabulary, grammar, functions), content (marketing, management), communication skills (telephone, meeting, presentations), and cultural awareness of social and business behaviors” (Nicoleta, 2008, p. 574; Ellis and Johnson, 2002, p. 35). Unlike the course plan in the university context, which is “fixed and unchanged focusing on command of structure and functions” in business English (Zagan- Zelter et al, 2010, p. 249), the workplace context presents more flexible and tailor-made course syllabi and objectives.

### 2.5.2. Material

Course material is an important component of workplace *EOP* training programs. Guiding principles for the selection and evaluation of course

materials have been identified in the literature. For example, regarding the types of materials being evaluated and adopted in *English for Business Purposes* programs, Ellis and Johnson (2002) included “published materials (general business course book, supplementary materials, job-specific materials, self-access materials, video materials, business skills training materials and business simulation games) and authentic materials specific to different companies and industries (books, media and company specific materials, such as product information, annual reports etc.)” (p. 117). More recently, there has been a trend of using corpus to present students with authentic materials that are closely related to their daily work samples, drawn from computer databases (Paltridge, 2012, p. 180). For example, in teaching turn-taking in business meetings, Angouri (2010) found that the textbooks were not adequate and authentic business meeting examples needed to be drawn from the corpus to supplement the published materials. In the project of New Zealand’s Victoria University of Wellington on developing “sociopragmatic skills” of immigrants for working in the companies, authentic workplace interactions from the corpus are used for compiling course materials for the program, which prove useful for improving migrants’ workplace communication performance and success rates in job application (Marra, Holmes and Riddiford, 2011, p. 91; Marra, 2013, p. 175).

When evaluating the materials, it is important to look at the course objective, the target student groups and whether the materials suit the student group. Hutchinson and Waters (1987) developed a four-step evaluation process that includes “defining criteria, subjective analysis, objective analysis and matching”. A “checklist” of material evaluation was then presented (p. 97). Chan (2009) developed a “holistic” model for evaluating business English materials to bridge the gap between research and pedagogy so that the teaching materials can be more effective. In the case of Nchindila (2011) in using report texts to teach report writing in South Africa, it is emphasized that the materials should be “easy to administer, easy to follow, lively to the learners, capable of producing useful outcomes and based on a research context” (p. 52). Paltridge (2012) indicated that teacher can alter the content and sequence of the materials to suit student needs.

The selection of materials suited to the courses for developing communicative competence is dependent on syllabi, which can be notional-functional or situational, incorporating such experiences and activities as problem solving or communication. There can be both “textbook and no-textbook” approaches in deciding the selection of course materials, but it has been specified theoretically that the “non-textbook approach” is more widely used for “advanced learners” (Savignon, 1983, p. 137).



In the context of language learning, authentic texts reflect the second language learning rationale, which meets the characteristics of language learners in motivation, learning style and language processing. The design of authentic tasks should meet the guidelines of “consistency with communicative purpose, approximate real life tasks, exploiting learners’ existing knowledge, promoting purposeful communication, corresponding to different communicative skills and task typologies” (Mishan, 2005, p. 75). In the second language learning context, the authenticity of materials and tasks can be developed by using published multimedia resources from the Internet and newspaper. Authentic tasks can then be designed consistent with communicative purpose (Mishan, 2005).

In the *EOP* program in the workplace, the authenticity of course materials is an important guiding principle for the selection of course materials, recognized in the literature, such as in Planken and Nickerson (2009), as the published textbooks have been worryingly not reflecting the real workplace language use. This indicates that *EOP* trainers must rely not only on the pre-prepared textbooks and handouts, but also a collection of authentic materials gathered in the workplace. It has also been recognized that the effectiveness of *EOP* training programs in the workplace can be influenced by the types of materials

used in the teaching process. Thus, material evaluation is an important step to be included in the workplace *EOP* program evaluation process.

### 2.5.3. Delivery

The delivery model of *EOP* in the workplace environment is derived from different fields. In workplace English curriculum, it has been reiterated that the special workplace communication requirements have generated the skill needed including reading, writing, speaking and listening in their specific genres and formats. Thus, the effective teaching of “workplace genres” follows “a development model” which includes “developing schemata to begin at the student’s level and provide maximum support, building on prior knowledge and developing cognitive clarity”. This is achieved by introducing the workplace text, inviting industry speakers and engaging students in role plays. More importantly, the delivery of workplace English follows a “contextual approach” which integrates the needed genres and skills. There can be “student-centered activities” integrated with “technical/vocational courses” (Boiarsky, 1997, p. 24). The plural nature of workplace English teaching has also generated the needs of collaboration, defined in the context as “joint work - interdependent professional activity involving conscious structuring of time and task, as well as teacher leadership and initiative” (Little, 1990, p. 519). The collaboration in a

workplace English curriculum involves students, other teachers, and “business, industry and community members” (Boiarsky, 1997, p. 129).

As a key element of delivery, the methods for workplace *EOP* programs are based on English language teaching methods. Meanwhile, due to the contextual influences, a synthesis of approaches from multiple fields is also necessary considering the skills development or vocational competence development needs concurrent with workplace English training.

#### 2.5.4. Methods

##### 2.5.4.1. The theories of English teaching methodologies

*EOP* teaching methods were originally developed with theories and principles of English teaching methodologies. In the field of English language teaching methodologies, there have been reported transitions over past decades. English language teaching methodologies have been developing from “grammar translation, direct method, audiolingualism and cognitive code” (Pica, 2000, p. 2). Methods range from “Total Physical Response” (Asher, 1969 in Pica, 2000, p. 2) to Counseling Learning (Curran, 1972). “Communicative methodology, communicative language teaching and communicative approach” (Richards and

Rodgers, 1986 in Pica, 2000, p. 2) emerged during this period, in the context of which the teaching of English is oriented towards the “communicative use of English” (Allen and Widdowson, 1979).

Communicative language teaching approach as an important stream in language teaching methodologies has been particularly linked to developing learners’ communicative competence in the target setting, workplace or social occasions. The communicative process of English language teaching is seen as a response to “communicative incompetence”, focusing on “students’ predicted communicative needs” (Johnson, 1979, p. 192) and communication difficulties in various situations (Scarcella, 1990). In the most recent decade, the communicative language teaching approach has been developed with more principles emphasizing “identifying needs of language learners, speech acts in syllabus design, tolerating variation in classroom, concern for individuality and autonomy, learner support, contextualizing the delivery of language teaching items, authenticating of materials used in class and promoting strategies which foster natural language performance” (Brumfit, 2001 in Walcott, 2007, p. xi). The latest development of communicative language teaching has also devised methodological principles of “communicative language teaching and task-based instruction” including “promoting learning by doing, inputting needs to be rich, meaningful and comprehensible, promoting cooperative and collaborative

learning and respecting affective factors of learning”, which were applied in developing “listening skills, oral communication skills and reading skills” (Brandl, 2008, p. 7). The field of communicative competence development is also discussed in the latter section to identify suitable new delivery approaches for training *EOP* in the Chinese workplaces.

For *ESP* programs, students’ communicative needs are typically more rigorously specified, coupled with a teaching method “not unlike traditional methodology” (Johnson, 1979, p. 194). Long’s (1990) study on developing learners’ communicative competence in the *ESOL* classroom introduced the concept of “group work”. One-on-one teaching is another approach commonly used in second language teaching, under the “1/1 principles” of “adjusting to others, involvement and proximity”. It requires a thorough understanding of learners’ case histories and the use of various materials, ideas and techniques (Murphey, 1991, p. 1).

Methodology in language teaching is developing enriched with perspectives such as “applied linguistics, language, education and language education”. Instead of sticking to a single method or a universal “super-method”, there has been calling for “equipping” trainers with “a repertoire of methods and skills to be applied to different contexts” (Adamson, 2005, p. 604). More theoretically,

methods have been interpreted into three levels: the approach which prescribes the supporting “theories of language and language learning”; the design which includes “the specification of linguistic content and the roles of the teacher, learners, and instructional materials”; and the procedures, which prescribe the “techniques and activities” used in the class. Methods can thus be viewed as “curricula resolutions” conducive to certain curriculum scenarios, including such factors as “planned objectives, syllabus specifications, types of resources, the roles of teachers, learners and materials, and actual teaching and learning practice”. Moreover, the selection of appropriate methods is also subject to the contextual social cultural variables (Adamson, 2005, p. 605).

Teaching *EOP* in the workplace context can be more viewed as a “social practice” because the goal is to develop employees’ communicative competence in the “target language” for specific purposes and contexts. This has generated the wide acceptance of “communicative teaching approach”, along with the development of “functional-notional approach” which centered language learning in different language functions. The corresponding methodologies include the aforementioned “presentation-practice-production” method, which is centered on the designed syllabus and “task-based learning”, which advocate “learning-centered curriculum” (Adamson, 2005, p. 608).

The concept of English language teaching approach as social practice is also linked to “social and cultural consideration” in communicative language teaching and communicative competence development. Social and cultural examples have appeared in India, Germany and Japan in demonstrating the differences in their “attitudes towards English”, the use of English and English language teaching approaches. This concern for contextual influence on the process of communicative competence development corresponds with diverse approaches including “discourse-based approach”, particularly suited to *ESP*, “communicative curriculum” incorporating systematic activities for developing communicative competence and “communication-based approach”, in which cultural and social changes “play an instrumental role in shaping speaker's communicative competence”. Different social and cultural contexts require tailored approaches, materials and activities in communicative competence development processes as the examples of different materials and activities for Indian, German and Japanese learners have shown (Berns, 1990, p. 84).

The principle behind selecting teaching methods is to “maximize learning opportunities” accounting for “local contexts and learner’s specific needs and abilities, promote learner autonomy, contextualize and integrate language skills, raise cultural consciousness and ensure social relevance” (Adamson, 2005, p. 618). The selection of second language teaching methodologies is based on

factors such as “stages of second language development, cognitive strategies and features of linguistic complexity, classroom dynamics”, trainer’s “professional experience and awareness of learner needs” and the context in which the teaching methodologies are implemented (Pica, 2000, p. 2). Meanwhile, it is also indicated that learner’s experience of methods depend on the factors of “intelligence, aptitude, personality, motivation and attitudes, learner preferences, learner beliefs, age of acquisition, and the nature of the activity” (Lightbown and Spada, 2001 in Adamson, 2005, p. 612).

In contrast, trainers are expected to “adjust the methods to the needs, goals and expectation of students, also complying with the educational and financial resources” of the training institutions, while the goals of teaching focused on “students’ preset goals and potential needs for second language proficiency” as “facilitators of the process” (Pica, 2000, p. 4). In this context, the “materials, activities and strategies of communicative methodology have shifted the focus from form to function and from teacher to learner”. “Activities of role plays and problem solving” often dominate the classroom (Pica, 2000, p. 5). Liu and Chu (2010, p. 630) revealed that compared to “non-game learning”, students participating in learning activities involving education strategies of “ubiquitous game-based learning, collaborative learning and context aware learning” in an



English listening and speaking course have generated better learning outcomes and motivation.

#### 2.5.4.2. The development of *EOP* methodologies

The methodology for *EOP* is developed based on English language teaching methodologies and the teaching methods applicable to the *ESP* context. In teaching *ESP*, Huckin (1998) indicated that case studies have been used for years. Team teaching arrangements have also been made between technical teachers and language teachers. The *ESP* training methodologies of “problem solving, high-order reasoning and argumentation” have made their way into the curriculum (p. 61).

The usual teaching methodologies for *ESP* include a task-based approach with such principles as reality control, non-triviality, authenticity and tolerance of error; role play and simulations (non-ELT simulations); case studies (including case conferences and studies of real-life cases); project work (including group, mini-research, and literature-based projects); and oral presentations (Robinson 1991). Compared to using case studies in *ESP*, “scenarios” used in “cross-cultural business communication instruction” are also suited to teach *EOP* in the workplace context. Scenarios are shorter than case studies and

provide a clearer focus on the very specific behavioral skills or shorter periods in the business communication process, which can generate deeper and more meaningful discussion than case studies (Victor, 1999, p.99). In the case of using oral presentations to teach *ESP*, Tsai's (2010) study on developing and integrating courseware into *ESP* courses has indicated improvement in student satisfaction and learning effectiveness, which is a recent case showing the task-based instruction can be augmented with multimedia learning theories and methods.

The development of *EOP* methodologies also includes the incorporation of pre-designed activities into the courses. In teaching business English courses, often the activities are designed for "one-to-one or group training". Such activities as "role play and simulation" involve the process of "setting up the activity and giving feedback", which are integrated into the overall course design process (Ellis and Johnson, 2002, p. 187). In developing communicative competence, often the pre-designed activities include the "conversation strategies" such as pair and group activities, covering conversation functions such as "beginning a conversation, clarifying, interrupting, soliciting attention, summarizing a conversation and ending a conversation" (Kehe and Kehe, 1994, p. iii). In *EOP* program context in the workplace, functional skills in the business communication process are the focus of communicative competence

development, such as business telephoning, presentation, negotiation and socializing. *EOP* training programs in the workplace can then follow the communicative functional procedures using various methodologies for training, either skill-based training, task-based instruction or group work.

On the specific topic of selecting methodological approaches, Dudley-Evans and St. John (1998) summarized the special needs of the *EOP* context when learners have “specialist knowledge” that includes knowledge of content and communication and a learning style. According to their research, it is challenging for the instructor to select appropriate approaches as “there is no best way and all techniques and methods are a response to a particular situation”. It is also discussed that a “more autonomous way of learning” should be encouraged. The traditional PPP (present, practice, perform) strategy could be suitable for intermediate-plus students while the “deep-end” strategy relies more on a student’s autonomy and task-based learning to mirror the professional world. The selection of methodological approaches depends on the variables of learning styles and strategies in particular disciplines or professional contexts (p. 187)

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In practice, the design and delivery of workplace *EOP* training are the results of consultation with employees, human resource managers, general managers, and

department heads in the context of business growth. Selecting creative and effective training approaches suited to the workplace or occupational contexts and training program objectives is crucial.

#### 2.5.4.3. Previous cross-disciplinary research on workplace *EOP* training

In the cross-disciplinary research of workplace *EOP* training delivery, the contexts of studies in the 1990s tend to cover linguistic (language used in business communication activities such as socializing, telephoning, and negotiation) and non-linguistic issues (“communication strategies, status relationships, and cultural diversity”). The philosophy behind *EOP* delivery is that it encompasses “business communication skills, business contexts and language use in business settings”, led by the relevant teaching materials. An “interdisciplinary” issue is raised for further study (St. John, 1996, p. 5). Dudley-Evans and St. John (1998) later indicate the multidisciplinary linkage of *EOP*, drawing on the work of other areas and including “management training, human resource management, communication skills training, and cross-cultural communication” (p. 70) within a large cluster of studies in different geographical areas, emerging in “South East Asia” (Crooks, 1996) and the “Pacific Rim, Latin America, Middle East and Eastern Europe”.

More recently, Kim (2008) from Korea further initiated the “interdisciplinary” nature of *EOP* study as crossing the line between *ESP* and training and development (T&D). The study found out the differentiation in occupational needs in *EFL* learning can explain the distinctive approaches of *EOP* training and research compared to the general training. The purpose of *EOP* training is usually professional-related and aiming at improving performance. Published findings from IATEFL *ESP* group, *EMP* academic and technical writing skill course training (Puentes, 2008) and the English for Information Technology lexicon study (Kovacic, 2008) reflect international developments in *EOP* training research.

In workplace *EOP* training programs, guidelines for effective delivery of workplace *EOP* training are based on thorough needs assessment, to understand the language use, instructional preferences and workplace environment. The subsequent procedures for “instructional design, material and training activity selection, training delivery and program evaluation” can then be appropriately implemented. The decision to use appropriate training approaches is learning centered and combines “role play”, “simulation” and traditional language training techniques with a specific focus on authentic workplace communication activities. The purpose of workplace *EOP* training program is to serve human resources management and “public policy” in increasing

“human capital” (Friedenberg, Kennedy, Lomperis, Martin and Westerfield, 2003, p. vii).

As mentioned above, *ESP* methodologies later moved beyond language teaching to include much broader disciplinary input. For example, the approaches used in teaching *ESP* writing have become the synthesis of “product approach, process approach and social constructionist approach”, with an expanded focus on both language and skills (Dudley-Evans and St John, 1998). A newer study on *ESP* writing examined the adoption of “collaborative activities” in teaching practices in order to strengthen the link between *ESP* classroom and workplace, so that learners gain better understanding of the workplace practices (Bremner, 2010).

The following review of the workplace *EOP* training literature will incorporate more comprehensive and relevant fields that have not been fully covered including Business Management Training, Communicative Competence Training, Technical and Vocational Education and Training, Workplace Training and Learning and Workplace Language and Literacy Delivery.

#### 2.5.4.4. Business management training methods

*EOP* training in the workplace is considered heavily impacted by business management and training modes (Lockwood, 2007). *EOP* training delivery can be either learning-centered or skill-centered approach, which focuses more on functional skills or knowledge such as listening and note-taking (Hutchinson and Waters, 2002).

The usual approaches in management learning, education and development include “experiential learning, collaborative learning, collective learning and reflection”. Business management courses are usually “learning team based, problem-based and project-based”, by which the knowledge acquired is transferred to authentic situations (Amstrong and Fukami, 2009, p. 69, 126, 344). Following the “management training cycle” of “activity, debrief, conclusion and implementation”, different training instruments can be developed to facilitate learning in certain subjects such as “intercultural business training”, in which procedures such as “reflection and action, training and coaching, instruments of experiential activities, critical incident, communication matrix, role-play, and personal interview” are effectively applied (Tomalin, 2009, p. 115).

In addition, in enterprise education, the training mode is creative, action-based and experiential, outside the normal classroom environment. The learning outcomes could be for “development of personal skills, behaviors and attributes for use in a variety of contexts”. The training methods can be applied to “different teaching and learning contexts through different subject areas”. The teachers/lecturers can have different “teaching styles” which facilitate “creative problem solving, risk taking and interaction with the outside world” (Jones and Iredale, 2010, p. 12). Meanwhile, in business education, experiential learning through the cycle of “knowledge, learning and doing and case methods” is popular in famous business schools in the U.S. such as Wharton Business School and Harvard Business School (McHann and Frost, 2010, p.4).

The selection of business management training approaches to use in *EOP* training is believed to expand the workplace training horizon inspirationally. Successful teaching practices in workplace settings rely heavily on constant interaction between trainers and trainees, thinking on the action and observation (Duckworth, Wood, Dickinson and Bostock, 2010).



#### 2.5.4.5. Communicative competence training methods

Communicative competence, as outcome of workplace *EOP* training, is difficult to define. The dimensions of the term would involve “theoretical relevance” (subordinate to “effectiveness and appropriateness”), “methodological relevance” (based on observation) and “practical relevance” (related to practical application). Its meaning is constructed from contributions from disciplines such as “linguistics, social psychology, sociolinguistics, sociology and communication”. The criteria for measuring communicative competence generally exist in the specific communication skills, “public and professional contexts” and various interpersonal interactions. The issue is whether the communication activity can reach the preset goal (“effectiveness”) and whether it accords with “social factors in a given situation” (“appropriateness”) (Rickheit et al, 2008, p. 15).

The conceptual plural nature of communicative competence has led to hybrid training methods, which extends from methods such as “simulated conversation, structured communication exercises, case studies, review methods”, and specialized training methods in presentation, reading and writing (Rickheit et al, 2008, p. 315).

One typical approach in communicative competence training is the “skills approach”, in which communicative competence is viewed by specific social skills such as “questioning, non-verbal behaviors, reinforcement and feedback, reflecting, explaining, asserting and confronting, interpersonal problem-solving, interacting in groups”. In the skills approach to training communication, the most widely used method is “micro-training approach”, comparable to the “microteaching approach” in “teacher education”, where training is usually taking place in simulation. In the micro-training approach, the focus of communicative competence training is on one “particular skill” in communication, such as “questioning”. Thus, “communication skills training” is a term used to describe this approach. Its implementation involves steps such as “preparation”, “sensitization” (identification of communication skills by reading, discussion and video), “practice” (role-play and simulation) and evaluation, which can inform future training approaches. The critique of this skills approach to communicative competence training is that the “wholeness, spontaneity and genuineness” of interpersonal interaction might be lost (Hargie, 2006, p. 551).

Workplace *EOP* competence can fall into the dimensions of communicative competence in professional contexts, which is usually linked to negotiation, presentation, telephoning and reading in corporate contexts (Donna, 2000). The

skills training approach and communicative competence training methods were applied and transferred to most of the global business English communication training programs.

In one workplace effective communication training program for three companies in Australia's food industry, workplace changes have been considered along with changes in technology, culture and industry. In the training context, communication channels are through assessment, course materials, spoken interaction, on-the-job communication, in which different training approaches are incorporated. Social cultural background and occupational differentiations affect the communication styles in training (Joyce, Nesbitt, Scheeres, Slade and Solomon, 1995). In Japan, communication training programs are created in the medium of English to improve employees' ability to communicate in global negotiations and transactions (Kameda, 2005). In Malaysia, engineers in multinational chemical companies were surveyed to identify the "English communicative events and skills needed at the workplace" and oral communication skills were found to be more frequently used than written communication skills. Important communicative events in the Malaysian workplace include "teleconferencing, networking for contacts and advice, and presenting new ideas and alternative strategies". Fluency in the English language can provide opportunities in the Malaysian industry and the

findings inform the pedagogical design to incorporate real-world workplace scenarios into the training program (Kassim and Ali, 2010, p. 168).

#### 2.5.4.6. Approaches of technical and vocational education and training (TVET)

TVET is another important dimension in the study of workplace *EOP* training. TVET training methods encompass “non-formal learning” in the form of “structured on-the-job training” and “apprenticeship training programs” in the workplace and “informal learning” in the form of “unstructured” workplaces, community and home learning (World Bank, 2003, p. 3). The review of TVET modes is to be applied in workplace *EOP* training programs as part of the broad TVET system. Country TVET models are cited to provide good practice examples for the miscellaneous and flexible modes TVET can offer to workplace *EOP* training programs.

In European countries, while German models have adopted the world renowned dual system of on-the-job training and apprenticeship programs (Schneider and Mattenklott, 2007), U.K.’s vocational and adult education qualification system is consistent, ranging from National Vocation Qualification to General National Vocation Qualification. TVET is well integrated with academic education. Education Department is in highly efficient cooperation with Labor Department

to ensure the in-time labor quality and quantity for U.K.'s economic development. A positive link between increase in work-related adult training and salary in the labor market has recently been discovered (Vignolesw, Galindo-Ruedan and Feinsteinnn, 2004). In the Netherlands, modes of apprenticeship have been extensively adopted at different stages of the TVET system and "learning at the workplace" is occurring between apprentices, TVET centers and labor organizations. Workplace learning is gaining importance due to the increasing needs of "effective problem solving on the job and work process knowledge". Apprenticeship in the workplace can enhance the quality of workplace learning by designing curricula which "integrate learning places and learning experiences and enrich workplace learning" (Onstenk and Blokhuis, 2007, p.489).

In Australia, TVET is considered to be of strategic importance. Thus, massive research efforts and funds have been dedicated to improving the TVET system by generating the current employer issue and solution mechanism year on year. TVET plays an important role in providing employers with necessary labor and employees with the skill mix for economic construction. The Australian Vocational Education and Training Center conducts periodical surveys on employers and workforces for data and questions. It currently runs a highly professional training system to ensure that the labour force's skills are properly

upgraded, mainly those of the younger generation in vocational schools and universities. One of the training approaches chosen to link the vocational education, training and the workplace in Australia has been “contextualized learning” (Harreveld and Singh, 2009). Similarly, in Canada, adult training is considered an investment in human capital (Becker, 1964) which provides more knowledge and skill. Motivated by either career development or skill upgrading, vocational or adult training occurs at all life cycles. There are more training activities in “large firms, in the public sector, and among workers in professional and managerial occupations”. Factors such as education level, employer size, and “professional/managerial employment” all reinforce the vocational training activities (Hum, 2002; Gilbert, 2003).

In Asian countries such as Malaysia, dual training systems are being implemented in developing skill workers as important industrial personnel. The training covers four skill areas: “manufacturing tools (tool and dies), automatic control process, automotive mechanics and plant operation”. “70%” of the training is conducted “at the workplace” while “30%” of the training is conducted within the “training institutions”. The training method of coaching apprentices has been adopted to facilitate the process of developing workforce skills (Othman, Abdullah, Sulaiman and Shamsuddin, 2011, p. 154).

In the Chinese context, TVET system has mainly adopted modes such as “training on-demand, work-study alteration, comprehensive cooperative education mode, integrated into the local economy, company-school, work-study integration and teaching workshops” (Geng, 2005). Workplace *EOP* training practitioners can experiment borrowing these TVET approaches in the development and implementation processes as a way to make their programs more innovative.

#### 2.5.4.7. Review of workplace training and learning approaches

The understanding of workplace training and learning which emphasizes learning context can inform the development of workplace English programs as an important part of workforce training and development initiatives in the international business environment. Workplace training and development programs can be categorized into “instructor-led, computer-based and self-directed” types (Piskurich, Beckschi and Hall, 2000) which underpin the existing in-company language training activities. Similarly, according to theories, workplace learning encompasses “formal, non-formal, self-directed and tacit informal learning activities” (Bratton, Mills, Pyrch and Sawchuk, 2004, p. 2; Streumer and Kho, 2006, p. 12). Workplace training and learning theories are rooted in Technical and Vocational Education and Training

(TVET). In workplace training and learning underpinned by TVET theories, curriculum and delivery models abound. Enterprise-based training can include “formal training on the job” and “informal training” such as apprenticeship, mentoring and coaching (King and Palmer, 2010, p. 66). Global English communicative competence training falls into the language capability enhancement scenario. Thus, the delivery methods are flexible and encompass “situated learning, collaborative work-related learning, technology-enhanced learning, action-based learning and apprenticeship” (Maclean and Wilson, 2009, p. xx).

For example, Gallup and Beauchemin (2000) indicated that on-the-job (OJT) training is “one of the oldest forms of training has its roots in apprentice system”. OJT was historically used in technical education (p.121). Developing OJT programs involves “needs analysis, situation analysis, behavior objective specification, training material selection, design and production, as well as evaluation” (p. 124). The challenges of developing OJT include such issues as trainers' subject knowledge and willingness to play the teaching role, management support of the OJT program and the development of “one-on-one training skills of planning, preparing and presenting” (p. 125). In addition to OJT, other training methods and facilities which appear in the workplace learning programs are used differently according to the specific business



requirements. These include “coaching, mentoring, action learning, face-to-face, intranet and non-electronic open learning” (Gray, Cundell, Hay and O’Neill, 2004, p. 11).

Since the 1990s, workplace training and development activities have tended to shift from training to informal learning, in which “learning competence” consists of “cognitive, meta-cognitive and motivation” dimensions facilitated by “training climate” (Schulz and Roßnagel, 2010, p. 383). A workplace can thus be seen as a learning environment in which the “work is practiced with aim, goal, tool, procedure, value and norm”. There could be a need for measures such as “tailoring the workplace learning curriculum”, selection of the “learning guides” as well as the instructional media and pedagogical approaches (Billet, 2001a, p. 13; Billet, 1996, p. 20). The workplace learning method mainly involves “authentic activities, mentor and coach, and task engagement” in the workplace (Billet, 1995). “Simulation” has more recently been used to incorporate the “real world of work into educational classrooms” (Solomon, 2007, p. 115). Reflective methods have also been used to combine formal theoretical learning and “informal learning” from the angle of the “participants and the activities involved” in light of the higher demands on workers for an integrated competence in an increasingly more intellectual production environment (Svensson, Randle and Bennich, 2009, p. 775).

Concurrent to the 1990s, corporate training has also evolved to be more integrated in the organizations. Corporate training is differentiated from learning as more “transformative”. Corporate training activities cover “instructional design”, and training methods are equally important as “pre-training” and “post-training” environment as factors such as organizational culture, reward systems, “training materials” and “support from managers and others”, “employee efforts to use training outcomes” can impact the transfer of training outcome to actual job performance, organizational impact and further “learning of knowledge and skills”. Meanwhile, the changes in “corporate environment” and “needed learning” can influence the training design. Due to the increasing organizational integration with training and development activities, the training mode must incorporate both formal and informal methods, such as on-the-job training, including “electronic performance support systems, simulations, behavior modeling and open learning” based on the thorough prescription of job tasks and corporate environment (Lowyck and Clark, 1996, p. 465). In the U.S., corporate human resources training methods are shifting paradigms from “traditional subject-matter oriented instruction to performance-oriented instruction”. The unit of study for corporate training can be both “individual and organizational” (Lewis and Peasah, 1998, p.8).

Streumer and Kho (2006) especially reiterated the “context-specific nature” of workplace learning (p. 12). Hager (1998) clarified the differences between learning in “formal classrooms and OJT” and informal tacit “workplace learning” (p. 525). “Formal classroom learning and OJT” are teacher-centered and focus on the acquisition of knowledge and content specified in the curriculum while informal “workplace learning” is individual centered, self-directed and focuses on the experience of learning/competence development during the work without “formal curriculum or outcomes” (p. 526).

Workplace learning theories explained the major “conditions” for workplace “competence development programs”, as a part of workplace learning. These are factors such as “participants’ varied previous education, self-confidence, motivation, planning, content, design and implementation of programs and activities, the relationship of programs with company culture and internal organization”, along with such “external environment as labor market and technological development” (Illeris, 2011, p. 59). Obviously, these factors/conditions have effects on the businesses’ selection of “forms of participation” in workplace learning programs and the construction of workplace learning environments, on individual, team or organization levels (Fuller and Unwin, 2004, p. 133).

In general, approaches to workforce development have been grouped into “expansive and restrictive continuum”. In “workplace curriculum” dimension, the “expansive dimension” is identified as “highly developed, e.g. through documents, symbols, languages, tools, and accessible to apprentices”. The “restrictive dimension”, in contrast, is identified as having “patchy access” to workforce development practices. In the “workplace learning” dimension, the “expansive dimension” is described as involving “planned time off the job, including for knowledge-based courses and for reflection”. The “restrictive dimension” is identified as “virtually all on the job, limited opportunities for reflection”. In the “vision of employee learning”, the “expansive dimension” is described as “progression to career” while the “restrictive dimension” is identified as “static for job”. There has also been stronger recognition on technical skills and workplace learning in the “expansive dimension” than in the “restrictive dimension” (Evans and Phil, 2006, p. 40; Fuller and Unwin, 2004, p. 130). Furthermore, Evans and Phil (2006, p. 163) proposed an integrated approach to “construct more expansive learning environment”. Fuller and Unwin (2004, p. 135) provided different examples in which concrete corporate experiences were described in specific contexts.

Nevertheless, in the context of U.S. corporate employee training, a more recent review of literature indicated a lack of in-depth training systems and a broad context for “training program development, evaluation techniques or training delivery structures” compared with the European context of literature. Most of the employee training in the U.S. context has been “occupation or industry specific”. It is proposed to revise the traditional “general” vs. “specific” skill dichotomy. The workplace competence has been much broader to encompass “attitudes, communication skills and experience”, in reaction to the changing workplaces which require more social interaction and continuous improvement referring to the Japanese model of training. The “basic vocabulary of job training” should include terms such as “skills, skill transferability, types of activities that comprise training”. An “institutional analysis” beyond “individual-level” study is also recommended, which also includes studies in “training markets” (vendors, government agencies, information and signals between buyers and sellers of training). American employers are recommended to learn the “traditions of cooperation and reciprocity” used by “Swedish and German employers” to motivate job training and ensure social equity (Bills and Hodson, 2007, p. 258).

The more recent trend and direction of workplace learning and training approaches has focused on “workplace pedagogies” regarding “ways to better

teach, support, plan, organize, coach, and enhance workplace learning”. “Practice-based systematic learning” has been raised as the emerging trend of workplace learning model with new paradigm shift while “language and literacy” are closely linked with “identity and learning” (Fenwick, 2008, p. 18). These workplace training and learning theories developed in the previous studies can well inform and interpret the development and implementation of *EOP* corporate programs, particularly by enhancing the insights of occupational contexts.

#### 2.5.4.8. Workplace language and literacy program delivery model

In the specific scenario of corporate training program delivery in workplace language and literacy, the implications of 21st century globalization, information and technology changes have brought in the “changing world of work, education and training”. The importance of workplace language and literacy has been recognized in TVET, which has generated a new program delivery model of workplace language and literacy, in “Australia, U.K., U.S. and Canada”. Against the backdrop of increasing systematic planned training in the workplaces, the approaches of workplace education are becoming more “flexible” to increase the “effectiveness”. “Informal learning” has become more acceptable than “formal learning”, the types of which cover “one-on-one, peer

tutoring, computer-based packages, project-based, action-based model, experiential or adventurous” approaches. In the case of Australia, the role of “in-house trainers” has transcended beyond instructors and has become more as “change agent” of work practices. Workplace language and literacy training are more in line with competency-based development to enhance employability and the organizational learning strategies (Mawer, 1999, p. 19).

The design of workplace language and literacy training programs serves the occupational and industrial competency development needs, based on the competency framework of “adult English language and literacy” in the case of Australia, which could include aspects such as “procedural communication, technical communication, personal communication, cooperative communication, systems communication and public communication”. The competency framework in Australia also serves as a benchmark for workplace teaching and learning outcomes (Mawer, 1994, p. 8).

The development of workplace language and literacy program involves steps of “identifying needs and goals, recruiting learners, creating incentives to participate, collecting samples of written communication, testing and establishing the role of workplace educator” (Gallo, 2004, p. 38). The development of workplace language and literacy curriculum involves the

planning of the content, the class schedule, the class venue and the course length, which provide important support to the successful implementation of workplace literacy programs (Gallo, 2004).

To further development workplace English language and literacy (WELL) program based on this Australian skills and competency development framework, the most recent WELL case has revealed that the methods of “one-on-one just in time delivery in small groups or in conjunction with other training programs” have been used for onsite training. This has reaped such “productivity improvement as saved time, increased accuracy, better communication, career opportunities, flexibility and access resources”. In this case, “confidence” has been built into the workplace (Australian government, Skills Connect, 2013). Clearly, an understanding of workplace language and literacy models developed through different studies in various national contexts is also critical for the evaluative study of *EOP* training programs in the Chinese context.



#### 2.5.5. Learner assessment

Depending on purpose, *ESP* programs have a variety of assessment types. Hutchinson and Waters (1987) introduced three “basic” types of assessment for the *ESP* context, i.e. “placement test, achievement test and proficiency test” (p. 145).

Dudley-Evans and St John (1998) categorized assessment types into “classroom assessment, teacher assessment, peer and self-assessment”. There are also public assessments that teachers can use as benchmarks to compare the classroom learning outcomes with international certification systems, such as TOEIC and BEC. Tests can also be developed in house. The usual *ESP* test questions include the assessment of “writing, reading, spoken interaction and listening” (p. 210). However, for short intensive courses, it may not be appropriate to have tests as “the real effect is to show some time after the course” (p. 210). This is applicable to *EOP* programs in the workplace settings.

## 2.6. The vocational context

### 2.6.1. Resources and support

Based on the learning-centered curriculum evaluation framework (Hubball, Gold, Mighty and Britnell, 2007, p. 96), certain resources contribute to the formation of learning context. While both trainers and learners have been valued as resources for the construction of learning environments, the workplace itself can also provide comprehensive information that specifies the learning environment context. This includes authentic workplace business communication documents, corporate culture, and financial resources supporting workplace training and development activities, which are to be identified throughout program implementation.

For example, while designing a workplace English course for a printing company, Stapp (1998) developed the “instructor-employer collaboration model” in which both trainer and employer contribute to the provision of materials that are highly relevant to the printing industry and the technical background. The types of resources for learning include “question-answer tape” produced by the training participants, the appointment of “employer as a teacher”, “photographs, videotapes”, produced by the employer and “shop-floor

tour” (p. 169). This collaborative provision of workplace English training program resources has proven to be very effective.

In addition, in the context of *LSP* program provision, Arná-Mació (2012) indicated that technology plays an indispensable role in resource provision through “corpus, online communication, distance and blended learning courses” (p. 93) to cater to the constraints in program implementation and offer supplementary channels of learning.

#### 2.6.2. Management support

Based on the learning-centered curriculum evaluation framework (Hubball, Gold, Mighty and Britnell, 2007, p. 96), organizational structure and management are necessary parts of the learning context. This includes such practical issues as management support for workplace *EOP* training activities, the administration of the training process, and training participants to self-manage the learning process, which can also influence learning outcomes.

### 2.6.3. Autonomous learning

The autonomous approach as an alternative way of learning English has achieved success particularly with adult students and has been adopted in many regions including “Europe, Hong Kong, Japan, Korea, Thailand, Singapore, Mexico and Egypt”, which is especially important for workplace *EOP* training facing corporate employees. It is suggested that to ensure learner success, “learner training” should be provided so that resources are used more effectively, as effective language learners are always “adventurous” in integrating both traditional and self-access learning methods. In this context, the pedagogical implication is the shifting role of a trainer from teacher to counselor to guide students on “learning to learn”, “conceptual information” and “methodological information such as materials, work techniques and work program planning” and “psychological support” (Gremmo and Riley, 1995, p. 151). To create autonomy, a variety of approaches have been recommended as suitable to adult learners in the workplace. They include “resource-based, technology-based, learner-based, classroom-based, and curriculum-based approaches” (Benson, 2001). In the *LSP* program context in particular, Arná-Mació (2012) mentioned that learner autonomy has also become a critical issue when technology has enabled the provision of “authentic materials in

different modalities, interaction among partners worldwide and learner control over the materials and learning process” (p. 96).

Another strand of adult-learner research has focused on “andragogy”, a theory that describes adult learners as “motivated” due to “interest and experience”; these learners learn by “life situation instead of subject”, are “self-directed”, and present “individual differences in style, time, place, and pace of learning, increasing with age” (Knowles, Holton, and Swanson, 2005, p. 39). For the adult learning of English as a foreign or second language, a model is proposed to combine the Oxford (1989a) categories of language-learning strategies in *SILL* with the andragogical process of learning (Lavasani and Foreyards, 2011, p. 195). These findings are important resources for interpreting the issues and factors that influence the effectiveness of workplace *EOP* training.

#### 2.6.4. TVET characteristics

The results of empirical research have also indicated that learning in the workplace context is conducted through “a wide variety of formal and informal activities, including formal courses, informal job experiences, self-directed learning, and social interaction with others” (Noe, 2010 in Noe, Tews and Dachner, 2010, p. 279). In the TVET context, researchers have discovered that

an appropriate understanding of workplace learner preferences for a formal and structured learning format (classroom, trainer, or mentor) or a flexible, autonomous way of learning such as self-access or work-based learning is critical. Some studies have confirmed that work-based learning is more effective than the traditional delivery approach, particularly in the case of distance learning. However, it is still situation specific, as workplace learners should be given the proper support and training to understand learning preferences and acquire learning skills (Vorhaus, 2010).

A study on learner characteristics and learning outcomes of a distance Spanish course for beginners has indicated that for adult students, “different modes of tuition do not necessarily lead to different learning outcomes” (Coleman and Furnborough, 2010, p. 2). “Online language learning can be as effective as small-group classroom teaching” in terms of “comparative outcomes of target language spoken and written skills” (p. 19). In contrast, a survey of Chinese distance English language learners’ beliefs has indicated the perception that “distance language learning was much more difficult than traditional classroom language learning”, the success of which depends on the use of autonomous approach and previous experiences with the distance English language learning mode (Zhang and Cui, 2010). There has also been the recent trend of “blended learning”, “mixing online and face-to-face learning modes”. The case of

adopting corporate university in Korea has indicated that the mixing mode can solve “learning transfer problems” and bring “educational benefits”. The factors facilitating and hindering the blended learning modes were investigated to ensure the quality of learning transfer (Lee, 2010, p. 181). To cater to the individual differences in learning, personalized learning modes have been adopted for TVET programs in Australia, New Zealand, the U.S., and the U.K., respectively, through which different pedagogies are used for different learners and workplaces (Duckett, 2010).

Thus, this study combines the perspectives of second language learning, teaching methodologies from multiple fields, autonomous adult learning and TVET, because for *EOP* training program in the workplace, the objective of the learning process goes beyond language scope to include the development of employees’ global communicative competence for business growth.

## 2.7. The perspective of skills development for employability and employment

Skills development is an integral part of TVET. The activities of skills development “sometimes refer to occupational education and workplace-based training programs such as apprenticeships or shorter training programs in the workplace. But also sometimes they include all education and training in the

workplace” (Allais, 2012, p. 2). The skills development for employability is thus a precondition for employment in the labor market. Education and training are essential to meet the demands of the 21<sup>st</sup> century workplace.

In the case of U.K., “labor market”, “employment system” and “TVET system” are interconnected with “intermediary bodies” to ensure the employability skills supplied meet the demands of the labor market and economic development (Hayward and James, 2004, p. 1). Similar to the U.S. situation, due to the changing “economic factors” such as the shift from manufacturing to service industries, increasing "international competition in the globalized economy" and the use of technology in the workplace, the TVET sector has to respond by redefining the core skills in the new era. The skills required include “effective communication”, “application of numeracy and technology, personal and interpersonal skills and positive attitudes to change” in the national qualification system, in which skill is also seen as “competence”. The changing demands of workplace skills have imposed additional requirements on the education system, in which employees are to be prepared by themselves before entering the workforce and responsible for their personal development (Keep and Payne, 2004, p. 55). The skills development needs, however, can be discovered through systematic investigation with the employers, as can be found in the cross-sector study of Maclean, Tsang and Fien (2013) in Hong



Kong, which sheds light on education and training institutions and company employees.

Moreover, the “benefits of education and skills development” can be illustrated in recent research. It has been found that “1-year increase in average education attainment can lead to 5% increase in short-term growth and additional 2.5% increase in the contributions to technological growth”, which means investment in skills development can yield high “economic and social returns” (Boutin, Chinien, Moratis and Baalen, 2009, p. 81).

In the Chinese context, skills development for employability is vitally important. The current situation in enterprise presents a shortage of skilled labor to meet industry demand and university graduates who do not possess the necessary skill sets. Employees at the workplace have to be retrained with skills for product and service provision (ILO, 2012a). Training *EOP* in the workplace is one initiative companies take to ensure that the development of English communication skills meets Chinese requirements within the global economy.

In particular, skills development for employability in the workplace context also has to combine workplace pedagogy and skills development pedagogy in TVET with *EOP*, TESOL and communicative development approaches. The

workplace pedagogy includes “learning through everyday work activities” and “intentional guided learning at work” in which workplace trainers have to get employees engaged in the skills development activities. To “meet the changing requirements of the workplace”, companies have to “enact the workplace curriculum” and “support guided participation for the development of vocational capacities” while collaborating with “government agencies, industry bodies and vocational educators” (Billett, 2004, p. 149).

Moreover, skills development pedagogies are rooted in “technical learning and thinking” with pedagogical evolution in different countries (Hansen, 2009, p. 5). The perspectives of skills development for employability and employment can inform the delivery and evaluation of workplace *EOP* training programs in the dimensions of pedagogical concepts and methods as well as the benefits to employee skills development outcomes, meeting business needs in the suited workplace delivery mode.

## 2.8. The influence of adult education

*EOP* training in the workplace could be adult education oriented (Lockwood, 2007). In *EOP* Training programs, the role of adult education is emphasized in

occupational competence, knowledge learning, skill acquisition, subject concentration, cultural elements and language learning per se (Sifaki, 2003).

As an overview, the adult workplace training and learning activities form the major landscape of continuing education. According to the Organization for Economic Cooperation and Development's (OECD) (2011, p. 28) *Education at a Glance*, "across OECD, 40% of adult population" participates in "formal or non-formal education in a given year", with country specific variations. Adult's participation in "continuing education and training" is considered "essential to upgrade workers' skills and enhance an economy's overall skill level". There is also the issue of skilling "older workers" in light of the demographic shift. The finding is that "younger workers (25 - 34 years old)" and "highly educated workers" in OECD countries are more likely to invest in education and training activities.

For adult learners, Keeley (2007) raised the issues of "lower barriers to encourage adults to pursue learning". Both companies and individuals can share the finances of adult continuous learning. In delivering learning to adults, various measures are taken in different countries to ensure adults pursue learning with dignity, family support and ease of time and workload. In Korea, the "credit bank system" was established to facilitate adult learning throughout

their life. In mainland China, some cities such as Shanghai also established adult continuous learning account system to support further learning.

Adult education has provided the depiction of adult learning characteristics. Peers (1958) analyzed the adult learner characteristics using sociological theories. Adult learners are having occupational influences, not finding learning easy, having “conclusions from experiences” (p. 191) and were in the latter stage of learning. These aspects have created challenges in training of adult educators. Yadav (2002) discussed adult learners’ characteristics as having “a package of experience and values and own set patterns of learning”. Suitable “methods in adult education” can include “individual tuition, correspondence tuition, practical work, role play, projects and performances”. There can be both advantages and disadvantages of “teacher dominated methods, learner dominated methods or cooperative methods”, depending on the specific learning situation (p. 124). As the participants of *EOP* programs in the workplace are in the adult population, adult education theories can help *EOP* trainers select training approaches suited to adult learning characteristics.

As *EOP* training in the workplace can be categorized into “on-the-job training” or “in-service training”, the “adult education model” for instructional design is also consulted along with the language teaching methodology framework. The

instructional design for “adult learners” involves steps of “assessing and developing skills, developing content knowledge, learning the learners and understanding the learning contexts”, centering on the instructional strategies of “developing goals and objectives, developing learning activities and developing learner evaluation” (Dean, 2002, p. 3).

However, it is also arguable that the instructional design prior to adult training program commencement may lack the adequate flexibility to ensure responsiveness and interaction. Thus, the “adult education model” may only serve as a “tool” to obtain ranges of learning outcomes and assist in the learning of “facts, concepts, skills and attitudes” which aid “problem-solving” (Dean, 2002, p. 7). In the case of Australian national curriculum framework on *English for Professional Employment*, which targets adult second language learners entering the workforce, several guiding principles have been developed, including valuing the role of lecturer in curriculum development. The “learner-centered curriculum development” should respect the characteristics of adult learning, such as “past experience” and focus on “tasks and needs of the individual’s current life styles”. The teaching approach should focus on “the use of language in context, the system of language and the development of independent learning skills” (Nunan and Burton, 1990, p. 1). These findings in

the field of adult education are important for this workplace *EOP* training program study.

## 2.9. The perspective of lifelong learning

Lifelong learning is provided by different sectors, including government agencies, public services, and “private training providers”, within which corporate training activities usually focus on business, IT, or language training (Fisher and Simmons, 2010, p. 11). *EOP* training in the workplace is thus an area that makes important contribution to lifelong learning.

Lifelong learning is viewed as “vision of the future for adult education”. The recent trends of lifelong learning in the U.S. workplaces have revealed that due to globalization and changing demographics, “training and informal learning” are becoming increasingly crucial. “Investment in workplace learning” is important both to “individuals and organizations”, including “career development opportunities” and “leadership development” activities. “Technology-enhanced learning” such as E-learning and “knowledge communities” have also been the recent trends (Watkins and Marsick, 2009, p. 129). Moreover, another study has indicated that workplace learning is an emerging theme in lifelong learning. Workplace can be seen as a “learning

arena” on which employees “invest knowledge, skills and emotional commitment” (Olesen, 2009, p. 115). The training of *EOP* in the workplaces thus can promote the lifelong learning momentum of employees.

The field of lifelong learning has introduced suitable modes of learning and study strategies (Weinstein and Hume, 1998). These include self-directed learning (Taylor, 2009), distance learning (Peters, 2009), E-learning (Zhang, 2009), and World Wide Web learning (Panda, 2009). Teachers in the lifelong-learning sector should also understand adult-learning characteristics and follow suitable curriculum models and principles. Studies have also been performed on “bringing the real world of work to educational classrooms” through “simulation and real work projects” (Solomon, 2007, p. 115). It is therefore important to incorporate lifelong-learning concepts and approaches into the delivery process and evaluation of workplace training programs on *EOP*.

## 2.10. The perspective of human capital investment

Workplace *EOP* training programs should also follow the current human capital investment logic. The concept of human capital, first raised in economics, is associated with the contribution of labor and talent to economic growth

compared with that of financial capital, fixed capital, and other factors of production. Becker (1993) stated that “education and training are the most important investments in human capital” (p. 17), as training and learning activities in school, in university, and on the job can increase labor income and promote economic growth.

Moreover, Becker (1993) indicated that “on-the-job training”, “more specific training” than “general training” can increase labor productivity and earnings per person in the specific firms due to the increase in knowledge and skills. Economic analytical evidence has also indicated that on-the-job training can reduce “quitting and layoffs” (p. 30). In usual conditions, through on-the-job training employees can not only increase their human capital, but also have greater chances of job promotion and career development. Businesses have increasingly realized the importance of investment in human capital and have launched diverse human resource training and development initiatives to increase their employee productivity, which have direct effects on business growth and economic development.

In addition, the OECD (1998) defined human capital as “the knowledge, skills, competences and other attributes embodied in individuals that are relevant to economic activity” (p. 10). In addition to the attempts of economic value



analysis, human capital can be measured by an adult's level of educational attainment, adult skills (adult worker's level of "prose, document, and quantitative literacy"), and "market values" (p. 15). Investment in human capital can be achieved through increasing "financial expenditure in education and training, investing in public labor market training programs, investment by firms and organizations and investment by family" (p. 35). Cost-benefit analysis is being conducted to measure the return on investment (ROI) in human capital in different country and industry contexts. According to Keeley's (2007) OECD book on *Human capital: how what you know shapes your life*, the more contemporary trends of "going global, knowledge economy and aging population" have imposed social changes. The value of people is significant, manifested in the focus on increasing human capital, the return on education and learning.

In the area of human resource development and TVET, Kuchinke (2002) stated that investment in improving the workforce productivity follows the human capital logic to improve individual and organizational performance. Workplace *EOP* training programs as a kind of on-the-job training initiative, within the categories of human resource development or TVET, can increase corporate "human capital" in terms of making contributions to employee global business communication performance which can facilitate the internationalization of

business and economy (Friedenberg, Kennedy, Lomperis, Martin and Westerfield, 2003).

#### 2.11. Sustainable livelihoods in the Chinese context

In the ILO (2012b) initiative of *Promoting Decent Work for All*, it is stated that creating jobs benefits an “economy that generates opportunities for investment, entrepreneurship, skills development, job creation and sustainable livelihoods”. This initiative echoed with the earlier study of Billett and Pavlova (2005, p. 1), which stated that the abilities of individuals to maintain effective in their work are essential for the sustainability of “individual, local and national well-being”. In this sense, as a kind of human capital investment and skills development initiative by companies, education and training activities in the workplace not only ensure employability but also promote sustainable livelihoods.

Ashley and Carney (1999) define sustainable livelihoods (SL) as “a way of thinking about the objectives, scope and priorities for development, in order to enhance progress in poverty elimination” (p. 1), while the core principles of SL approaches “stress people-centered, responsive, and multi-level approaches to development” (p. 2). The elements of SL frameworks include identifying the “priority for personal and institutional development, access to social, human,

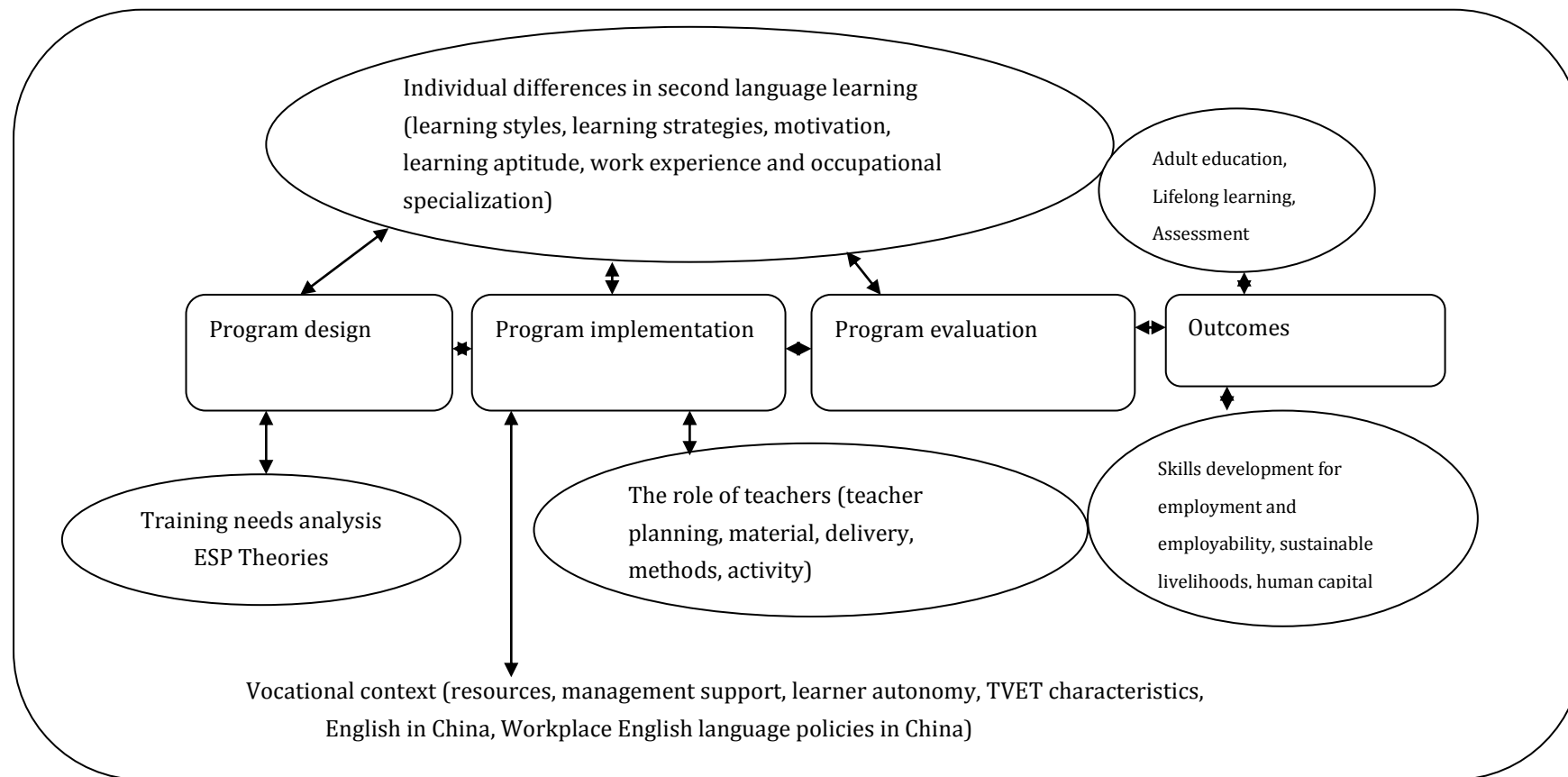
physical, financial and natural capital, and their ability to put these to productive use,” and “the context in which they live, including economic, technological and demographic trends.” Moreover, SL frameworks incorporate the participation of private sectors in the market and economic contexts while emphasizing “economic, institutional, social and environmental sustainability” (Carney, 2002, p. 11). In the case of mainland China, sustainable livelihood has been adopted in certain regions under poverty, though it has not yet been extensively promoted.

With regard to corporate training investment, “skills and experience are provided for employees to promote competitiveness and profitability” in the workplace (Adams, 2009, p. cxxiii). From a sustainable livelihood perspective, corporate training activities help to increase business profit and alleviate poverty, benefitting not only the company but also the region’s economic progress.

## 2.12. Conceptual framework

The following conceptual framework maps out the major areas this study is based on.

**Figure 1: Conceptual framework for the study**



## 2.13. Chapter summary

This chapter has reviewed the literature and theories surrounding the topic workplace *English for Occupational Purposes* training. *EOP* training has its definition derived from theories of *English for Specific Purposes* and *Language for Specific Purposes*. Course design including training needs analysis is an important part of *EOP* programs, which has also followed the nature of teaching job-related *ESL* training. In addition, the relevant fields for *EOP* training include individual differences in second language learning, which cover the topics of learning strategies, learning styles, personality, motivation, language aptitude, teacher belief, teacher planning, teaching methodology (including the approaches from second language teaching, *ESP*, business management training, communicative competence training, TVET, workplace training and learning, workplace language and literacy etc.), materials and vocational context factors, including, value, management, resources, autonomous learning characteristics and vocational education and training characteristics. Broadly, workplace *EOP* training and learning is informed by theories of adult education, sustainable livelihoods, human capital development and skills development for employability. The relevant theories in these fields helped to construct the theoretical framework of this study and serve as foundation for the evaluation framework elaborated in Chapter 3.

## CHAPTER 3

### THEORIES OF TRAINING PROGRAM EVALUATION FRAMEWORKS AND METHODOLOGIES

This thesis investigates the training effectiveness of workplace *EOP* programs, the comprehensive impact and the influencing factors in different business contexts.

The theoretical framework also contains a critical review of the literature on workplace English training program evaluation. The program evaluation is composed of process evaluation, impact evaluation and effectiveness evaluation. Theories of language program evaluation frameworks are also included. Different program evaluation models depicting the program evaluation process have been reviewed. Based on the program evaluation models, a unique evaluation framework suited to the workplace *EOP* program context is developed and applied to evaluating workplace *EOP* training programs in the Chinese context, which has been missing in the previous literature.

### 3.1. Workplace *EOP* training program effectiveness

In the second language instruction context, according to Graaff and Housen (2009), the effectiveness or “efficacy, usefulness” is concerned with the degree to which the “actual outcomes of instruction match the intended effects”. The “effective instruction is context appropriate, which is goal appropriate, learner appropriate and resources appropriate” (p. 727). In the workplace *EOP* training context, evaluating the program effects on communicative competence development involves the investigation into the program objectives, intended outcomes, learners, resource provision, the workplace environment and their contributions to the actual learning outcomes.

As an important part of the course development process, evaluating *ESP* courses usually starts from gathering teachers’ and students’ perceptions of course effectiveness through “end-of-course evaluation by questionnaires or interviews” (Basturkmen, 2010, p. 64). Studies on the effectiveness of *ESP* courses would address such questions as “Are there any unintended or unforeseen outcomes resulting from the use of any given *ESP* program?” (Master, 2005, p. 109), “How do *ESP* researchers assess the long-term effects of *ESP* learning?” and “What is the impact of *ESP* teaching on other

dimensions of learning such as learner autonomy?” (Cheng, 2011, p. 67). Paltridge (2012) argued that issues such as “what aspects of the teaching and learning will be evaluated, the evaluation criteria and the timing of evaluation” would be important for evaluative consideration. Methods such as “tests, interviews, questionnaires, learner diaries and journals, teacher record, student logs, student evaluation and classroom evaluation” from multiple sources can be used to triangulate and validate the findings (p. 182). Moreover, Harding (2007) indicated that *ESP* program evaluation should move beyond formal testing, which could be “achievement tests and proficiency tests” (p. 154) to enable learners to have self- awareness of the progress in the learning process. There could also be teacher evaluation involved to gain feedback after program delivery.

There is a shortage of research on program evaluation in the *ESP* literature (Gillet and Wray 2006; Cheng, 2006). The current research has been “limited on empirical investigation into the effectiveness of *ESP* teaching” (Johns and Dudley-Evans, 1991; Master, 2005). In the workplace context in particular, there have been “few empirical studies investigating the effectiveness of *ESP* in workplace training due to confidentiality in corporate culture and time and cost constraints in *ESP* program management” (Kim, 2008, p. 16).



Tsou and Chen (2014) recently developed a program evaluation framework based on Hutchinson and Waters' 1987 model and the comprehensive framework for foreign language program evaluation. This program evaluation framework was applied to an undergraduate *ESP* program in a Taiwanese university. More recently, Lam, Cheng and Kong (2014) evaluated the teaching and learning resources for the Hong Kong senior secondary school elective course "Learning English through workplace communication" and found discrepancies with the languages in the professional discourse. However, there is no recent evaluation framework for the workplace program context readily available in the literature.

### 3.2. Review of evaluation frameworks

The evaluation framework for *EOP* training programs in the workplace will be constructed using existing evaluation models based on a comprehensive understanding of the programs. In the area of evaluating training program effectiveness, the Kirkpatrick model includes four levels: "reaction, knowledge, behavior, and results". This model has been adapted for use in both corporate and higher-education settings (Smidt, Balandin, Sigafos, and Reed, 2009; Praslova, 2010). Melkman and Trotman (2005) applied the Kirkpatrick model to evaluate the training program for international managers and the training

evaluation methods could be “line manager’s observation, written tests, role plays and exercises, pre and post-test with questionnaires etc.” (p. 92), as a part of the program delivery process, in line with the four levels of Kirkpatrick model.

In the research for evaluating a self-access learning center, Morrison (2003) proposed a four-step evaluation framework that includes “mapping the target center, planning the evaluation itself, conducting the evaluation and then conducting a meta-evaluation”. Morrison (2005) further identified specific evaluation constructs in the self-access learning context, including learning gain and materials, learner strategies, activities, training needs, attitudes, use of learning diaries and an orientation process. Learning gain was evaluated by semi-structured interviews and post-interview questionnaires. The finding was that learning gain is an important construct in the evaluation framework, which can be assessed by the instruments of learning diaries, tests, learner portfolios, learner focus groups, and self-evaluations.

The TVET field also offers program evaluation and quality assurance frameworks (Cedefop, 2007). According to the EU common quality assurance framework (Cedefop, 2007), the rationale is “to improve and evaluate the output and outcomes in increasing employability, matching supply and demand

while promoting better access to lifelong learning”. The quality evaluation process follows the “model of planning, implementation, evaluation and assessment as well as review”. Series of quality criteria and quality indicators have been developed in each stage of the model. To assure the quality of *Vocational Education Orientation Program*, Jacob and De Wet (2013) evaluated it by using two questionnaires “to assess the individual modules and investigate the overall quality of the program” (p. 68), which were administered at the module end and one year after the program completion. The results of the study have informed the further improvement of the program and preparation for trainer qualification.

In lifelong learning evaluation and quality assurance, the teaching and learning evaluation is achieved through “silent watching and listening, written evaluations or spoken evaluation”. The purpose of evaluation is to “monitor quality and bring out improvement” and to establish “audit culture and professional autonomy” (Fisher, Iredale, Ollin and Robinson, 2010, p. 238).

For the program learning outcome evaluation, “key competences and occupational standards” are introduced in the previous studies. The international assessment studies along with OECD presented the competence areas of “literacy, numeracy, scientific literacy, problem solving, information

communication, working with others, tacit knowledge, capacity to manage learning, attitude to learning and civic knowledge”, which can provide “broad views for TVET” (Fretwell, 2003, p.188). Räisänen and Rökköläinen (2009) evaluated the “social and communication skills” in upper secondary vocational education and training by applying a common quality assurance framework (Cedefop, 2007) while evaluation data was collected through multiple sources including TVET providers, educational administrators, teachers, students, employers and workplace instructors. The evaluation outcomes have provided suggestions for the training of social and communication skills derived from the labor market.

In Jurmo’s (1997) evaluation report for worker education programs including workplace *ESL* courses, factors such as staff support, engagement of businesses and trainees, course relevance to needs and supportive learning facilities were the success factors. The information was gathered from various sources by questioning the stakeholders’ outcome-related and formative questions. Both work-related skills and not work specific skills were identified. Improvements in the skills were also discovered. In the case of appraising Hong Kong’s worker retraining scheme, factors of needs assessment, course objective, course content, instruction method, course delivery, training of instructors, labor development policies were thoroughly evaluated in the context of Hong Kong’s

economic, social and cultural development needs (Cheung and Tang, 1997, p. 84). In evaluating Hong Kong's worker retraining scheme, Chan and Suen (2000) mentioned the two dominant evaluation approaches: the experimental approach and non-experimental approach. The experimental approach drew on the comparison between control group and treatment group within the same population. The non-experimental approach adopted treatment group and comparison group from different groups of people. The study of Hong Kong Retraining Scheme adopted the non-experimental evaluative approach, due to limited access to participants. The study compared the performance before and after training, and the training effects on earnings and employment status.

The construction of an evaluation framework for *EOP* training programs in the workplace context is based on the existing evaluation theories in different areas such as workplace program evaluation, TVET and language program evaluation frameworks. The purpose is to examine not only the short-term program effectiveness in improving employees' language competence, but also the long-term comprehensive impact of the program on business' global performance and economic growth. The perspectives of the evaluation framework cover both gross impact on business and economy and net impact on employee communicative competence development, employability skills

development, performance improvement and employment earnings.3.3.

### Theories and practice of language training program evaluation

In language program evaluation theories, the term “evaluation” was differentiated from “assessment and testing by using standard instruments”. The evaluation process may make use of “assessment instruments”, as well as “unstructured interviews”. In this context, evaluation is defined as “the systematic attempt to gather information in order to make judgments or decisions”. The information gathered in the evaluation process can be both “qualitative and quantitative”, gathered through standard tests, “observation or interviews”. The term “program” was once defined as “any instructional sequence”, ranging from a full language curriculum workshop, *ESP* teaching unit to a self-access language learning software (Lynch, 1996, p. 2). In an adult ESL program framework developed by Nunan and Burton (1989), assessment and evaluation is also differentiated. Assessment refers to the measurements of student performance while evaluation is related to the effectiveness of a program. Assessment is composed of “teacher assessment by standard test, documenting of learner performance, observation and discussion, learner assessment by self evaluation and feedback from peers as well as workplace personnel assessment by recording learner performance on the job and surveys etc.” (p. 22). Program evaluation is composed of the process of “learners

expressing their views on course effectiveness by surveys or questionnaires, workplace personnel writing their views on the course effectiveness based on observation of performance and teacher's reflection" (p. 26). For English in the workplace program in Canada, Belfiore and Burnaby (1995) indicated assessment and evaluation are essential in understanding the training effectiveness. "Assessment of learners" would involve learners' "self-assessment", teacher's assessment and "supervisor's assessment". Program evaluation would involve the "learners, teachers, sponsors and the training provider by questionnaires and interviews" (p. 117).

As suggested by Lynch (1996), language program evaluation frameworks can be generated in seven steps using the "context-adaptive model": "identifying audience and goals, developing context inventory, developing preliminary thematic framework, designing and collecting data, analyzing data and evaluation reporting". Among these steps, the context inventory may address the "relevant dimensions of language education programs" such as "characteristics of program students, staff, size and intensity of the program, instructional materials and resources, program purpose and social climate". Moreover, in this model, the thematic framework focused on the effects of instruction, student's level of proficiency, the use of authentic materials on learning outcomes (p. 4).

According to Lynch (1996), the methods and theories of language program evaluation have evolved since the 1960s and 1970s, from an exclusive focus on experimental approaches to compare the pre-test with post-test outcomes and to contrast grammar translation method with audio-lingual method using experimental group and control group from a positivistic perspective, to a combination with naturalistic approach to investigate the classroom process. More recent developments in program evaluation have started to look at needs assessment to “examine the match between what is desired for the program versus the actual state of the program” and implementation evaluation “to look at the match between the original, stated plan for the program and its actual state”. The aim is to offer suggestions for improvement following “formative evaluation principles”, which looks at what is happening within the program rather than “summative evaluation principles”, which focus exclusively on outcomes (p.32). Grognet (1996) argued that both formative and summative evaluation are necessary in evaluation programs for workplace *ESL* instruction. In the U.S. context, Grognet (1996) added that such “program developed assessment instruments as checklists, learner-developed logs and portfolios” (p. 9) can be used to assess learner progress and evaluate the effectiveness of the program. In this way evaluative data was collected from various sources using different methods. These approaches for evaluating language education



programs can be adapted in constructing a comprehensive framework for workplace *EOP* training program evaluation.

In line with the stake-holding approach in school curriculum evaluation principles (Marsh, 2004), language program evaluation can also be based on the classification of stakeholder group, which varies across programs. Stakeholders play different roles in the program implementation or participation process, such as “program sponsor, policymaker, decision maker, teacher, student, regulators” (p. 205). In applying the stake-holding approach to the language evaluation process, various instruments can be used to collect evaluative information from the stakeholders such as by “focus group instruments” (Kiely and Rea-Dickins, 2005, p. 200). In the workplace communication program preparing immigrants for employment, the program evaluation takes various forms such as “evaluation questionnaire, a formal evaluation of teacher and the course, informal debriefing meeting at the end of each course with feedback from teachers, workplace consultants and managers and a survey of the employment outcomes” (Riddiford, 2011, p. 79). These comprehensive methods can provide an in-depth record of the participants’ progress in the learning process, thereby clearly indicating the degree of effectiveness of the program.

### 3.4. Program evaluation methodologies

In the field of program evaluation, including for practice and policies, different methodological approaches are taken to evaluate various aspects of the program implementation. The types of program evaluation include “process evaluation” (“focusing on the way a program is implemented”), “impact evaluation” (evaluating the program outcome and “measuring effectiveness such as cost effectiveness”), “policy evaluation” (evaluating “long-term consequences of the program and policies”), and “meta-evaluation” (“syntheses of evaluation research findings”) (Bingham and Felbinger, 1989, p. 4). The following sections particularly introduce process evaluation, impact evaluation and effectiveness evaluation, which can be applied in evaluating workplace *EOP* programs in this study.

#### 3.4.1. Process evaluation

Process evaluation has three major approaches to investigating the effectiveness of “program delivery for the sake of improving the program, reviewing program outcomes, or responding to practitioner needs at the individual site level” (Owen, 1993, p. 129).

These approaches can be applied in evaluating the process of workplace *EOP* program implementation.

#### 3.4.2. Impact evaluation

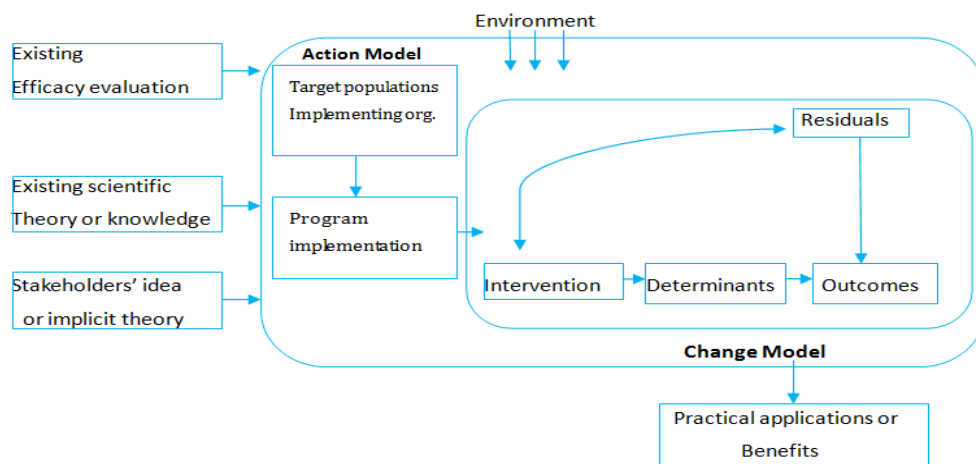
Impact evaluation is to “determine the impact of a program or two or more programs to help to determine whether the program should be adopted in other settings, with a focus on outcomes and delivery, usually conducted after the training, using objectives-based and needs-based approaches” (Owen, 1993, p. 21). This program evaluation approach can be used to evaluate the comprehensive impact of workplace *EOP* training programs.

#### 3.4.3. Effectiveness evaluation

In program evaluation theories, effectiveness evaluation is conducted in the “real world, with stakeholder’s support and collaboration”. The conditions for effectiveness evaluation include “stakeholders requiring the evaluation to be relevant and of practical benefit to the practice related to a program” (Chen, 2005, p. 201).

In addition, a conceptual framework has been proposed for effectiveness evaluation as in **Figure 2**, which can be applied in evaluating the effectiveness of workplace *EOP* training programs.

**Figure 2: Comprehensive conceptual framework of effectiveness evaluation**



Source: Chen (2005, p. 228)

#### 3.4.4. Program evaluation design

Various evaluation designs correspond to evaluation orientation. For example, “reflexive design” including “one-group pretest-posttest design” (for evaluating the outcomes of program intervention) and “simple time-series design” (incorporating the data at various points to evaluate the “programmatic outcomes”) can be applied to evaluate the intended outcomes of *EOP* training program delivery process in the workplace (Bingham and Felbinger, 1989).

### 3.5. Cost-benefit analysis

TVET is linked to economic development. Tabbron and Yang (1997) reiterated the contributions of TVET to economic development in advanced countries such as Canada, U.S. and Australia as globalization, changing demographics and unemployment as well as privatization generate renewed human resources requirements. Mouzakitis (2010) also indicated that changing market needs have diversified TVET curriculum design, delivery and assessment. TVET programs have been developed based on the identified business, human resources and market factors.

The most recent trend in TVET in the Chinese context includes the benefits various programs offer. The benefits of education and training activities are different from those of manufacturing, in terms of the difficulties in measurement, continuation in production output and discontinuity in the benefits they contribute. There has been increasing research on TVET benefits and contributions to salary increase, career prospect and social equity as the studies in U.K. and Europe showed. It was reiterated that the benefits of TVET programs lie in not only economic benefits such as productivity and employment increase but also social benefits such as sustainable livelihoods, equality and social harmony (Li, 2012). In secondary vocational education,

local empirical research in Suzhou, Wuxi and Changzhou, PRC indicated using arithmetic calculations the concrete economic benefits of TVET programs in industry restructuring, though with regional variation (Zhu and Xie, 2011).

The “cost-benefit analysis” of the workplace *EOP* programs addresses more practical issues - such as whether the program is worth the corporate investment and the actual financial contributions the program can make to business growth - as important dimensions of impact evaluation. “Cost-benefit analysis” is linked to “cost-effectiveness measures”. The benefits and effectiveness of the program are often connected to “established standards such as service level standards or goals, published by professional organizations”. The cost benefit design is to weigh all the costs and benefits (“short term benefits, long term benefits”, economic benefits and social benefits associated with the program) and to make decisions based on the comparison result. Cost effectiveness design, in contrast, is based on comparisons of “various alternatives to desired outcomes” in “before-after, cross-community or across-alternative process” dimensions (Bingham and Felbinger, 1989, p. 207).

Both cost-benefit analysis and return on investment are used to measure the return on training investment from a financial perspective. The “formula” can be shown below:

Cost Benefit Ratio =  $\frac{\text{Training Benefits}}{\text{Training Costs}}$

Training Costs

Return on Investment (%) =  $\frac{\text{Net Training Benefits}}{\text{Training Costs}} \times 100$

Training Costs

(Buckley and Caple, 2009, p. 255)

The recent study of Percival, Cozzarin and Formaneck (2013) revealed that workplace training in general can have “positive effect on productivity 12 out of 14 industries” under investigation. But in financial terms, the positive effects only maintain in “four industries” (p. 20). The study concluded that workplace training is necessary only to “maintain current productivity”. In addition, for workplace ESOL programs, Vitello (2013) indicated that the ROI can also include non-financial outcomes connected to “improved communication”. This includes such information as “reduced errors, fewer complaints indicating better customer service and other communication-related data” (p. 3).

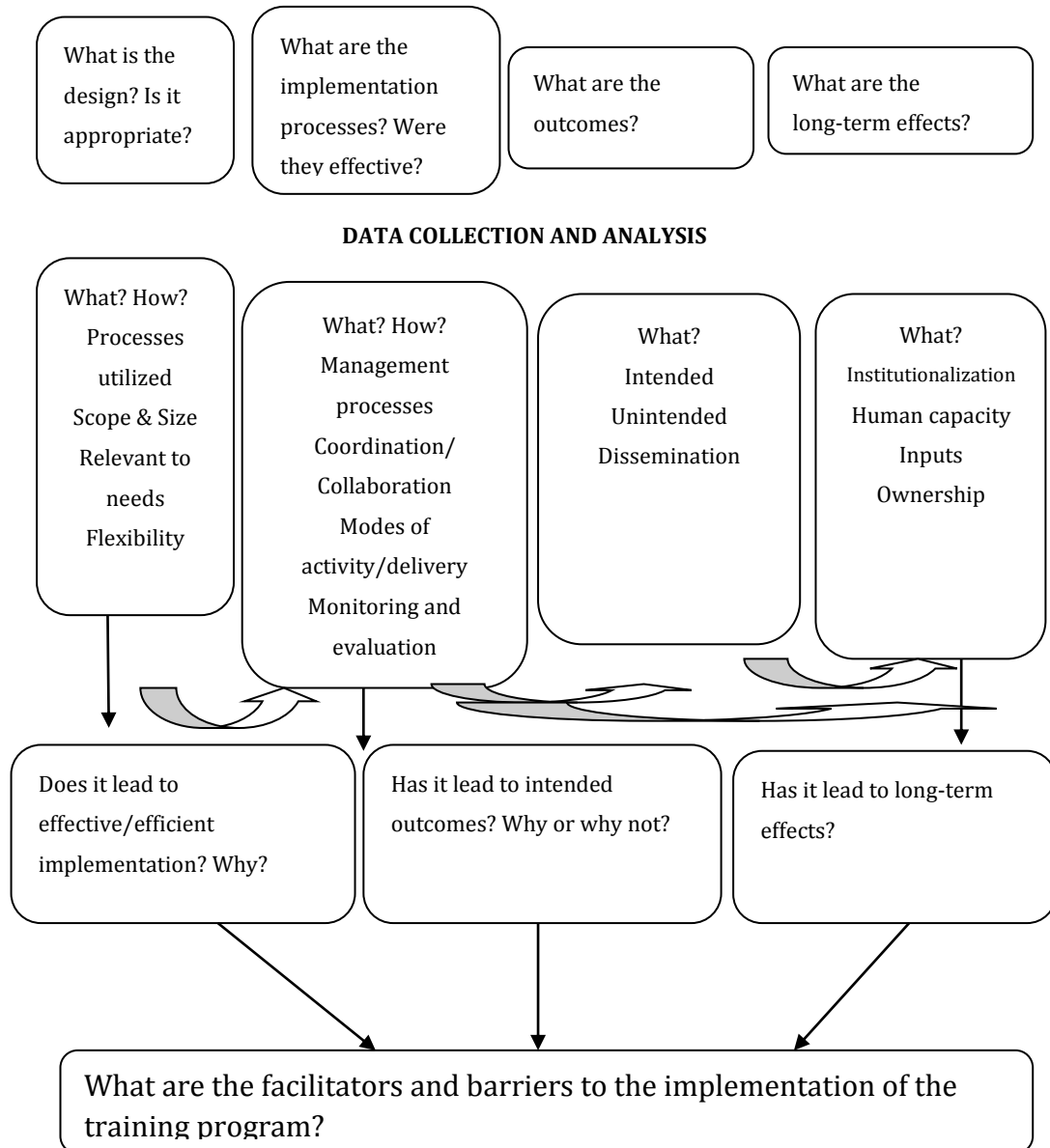
### 3.6. Evaluation frameworks for workplace *EOP* training programs

These program evaluation theories, methodologies, and approaches lay a solid foundation for the models of Adamson and Morris (2007, p. 277) (see **Figure**

3) in *Comparative Education Research: Approaches and Methods*, Diamantidis and Chatzoglou (2012) (see **Figure 4**) and Hubball and Burt (2004, p. 54) (see **Figure 5**). The evaluation model in Adamson and Morris (2007, p. 277) particularly addresses the effectiveness of course design, the course delivery process, the learning outcomes and the “long-term effects”. Relevant data related to the training program can be gathered for analysis and evaluation of the effectiveness. The questions raised include whether the delivery processes are “relevant to needs” and “flexible”, whether the “management processes, coordination, modes of activity, delivery, monitoring and evaluation” are appropriate and effective, and what the learning outcomes and the long-term effects are. Factors facilitating and hindering the “planning and implementation” of the training programs are to be analyzed (Adamson and Morris, 2007, p. 277). This model forms the sound basis for the development and application of the workplace *EOP* evaluation framework established for this study.

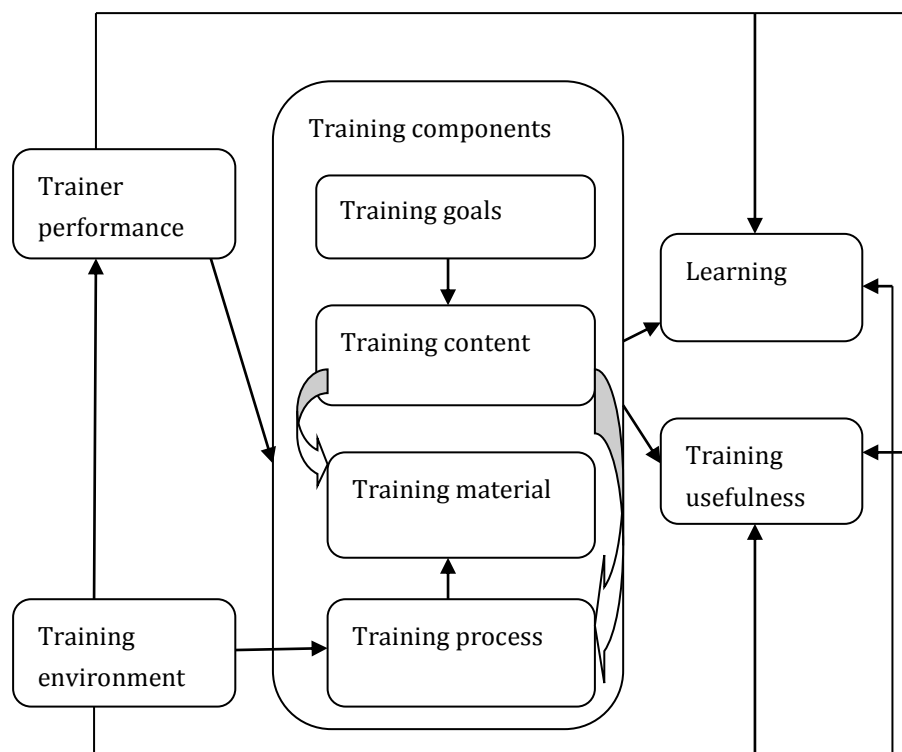


**Figure 3: Curriculum evaluation model**



Source: Adamson and Morris (2007, p. 277)

Diamantidis and Chatzoglou (2012) tested the relationship between the factors of a formal training program with learning and training usefulness through a questionnaire survey of 126 employees from different companies in Greece. This study concluded that the performance of the trainer and the delivery process have the strongest impact on training effectiveness, which would influence the training materials and various other factors in the training program. Their formal evaluation model (see **Figure 4**) can also serve as the basis for constructing a workplace *EOP* training program evaluation framework.

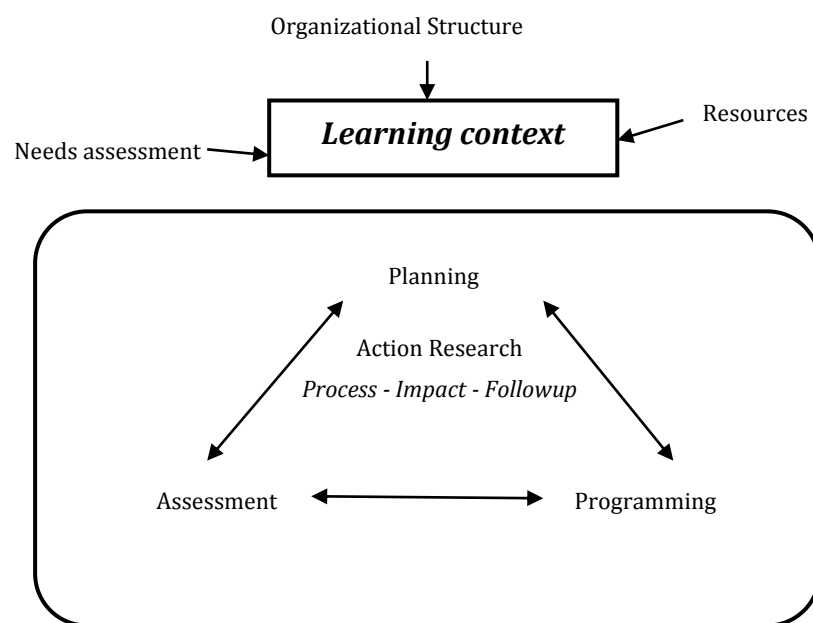


Source: Diamantidis and Chatzoglou (2012, p. 890)

Moreover, as the workplace *EOP* training programs under study aim to offer a learning-centered curriculum, an integrated evaluation framework (Hubball and

Burt 2004, p. 54) (see **Figure 5**) is relevant because it specifically analyzes the “learning context” by gathering data through the angles of “needs assessment, resources, organization structure” in “assessment, planning and programming” to understand the program process and impact.

**Figure 5: Learning context evaluation framework**

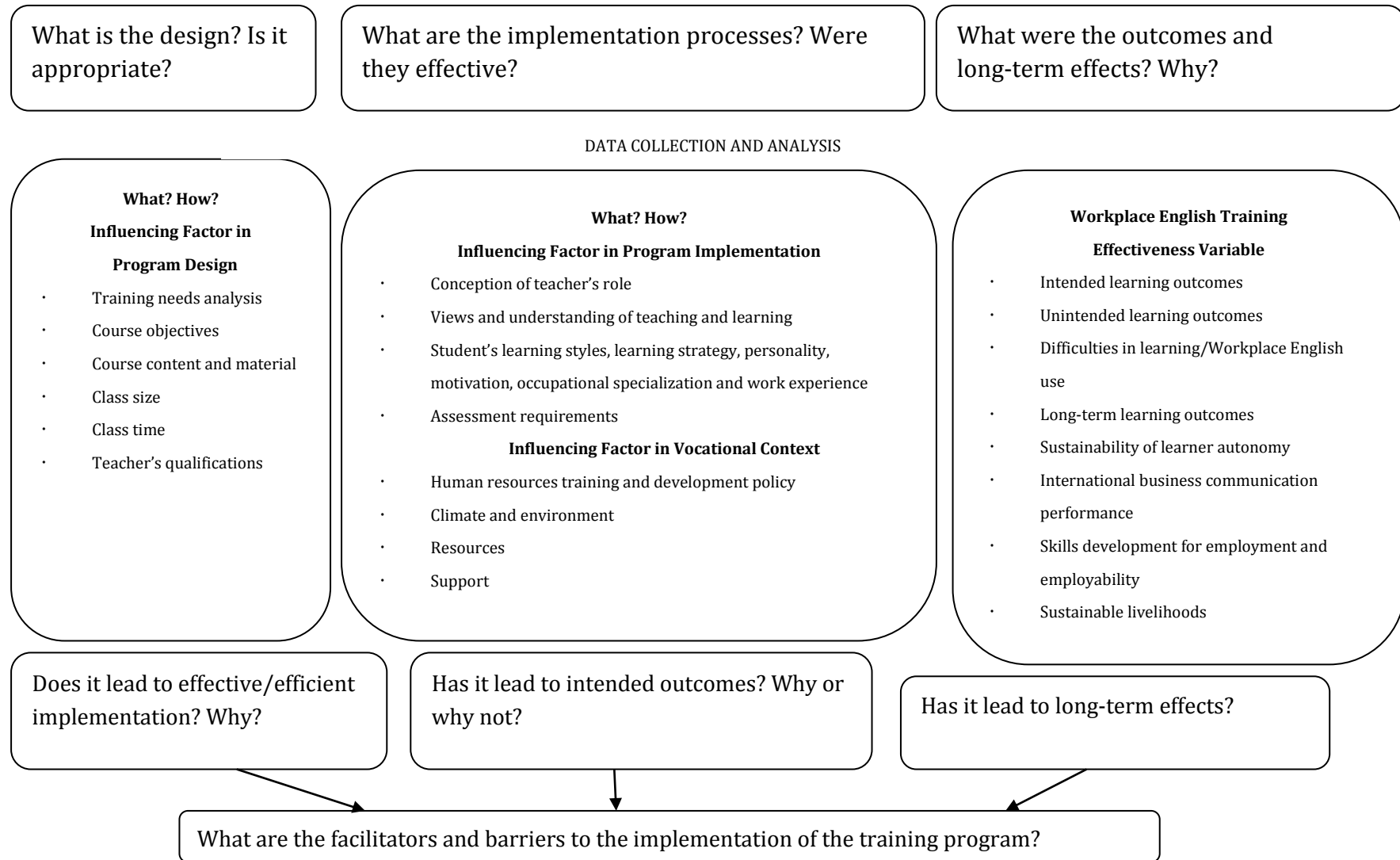


Source: Hubball and Burt (2004, p. 54)

In recognition of the value of the existing evaluation frameworks used to evaluate policy outcomes, corporate training programs, *ESP* programs and learning context, this study builds upon the previously mentioned models to develop a unique evaluation framework for workplace *EOP* training programs in the Chinese context. This kind of comprehensive and context appropriate framework is not readily available in the literature. The following **Figure 6** represents the evaluation framework for assessing the effectiveness of

workplace *EOP* training in the Chinese context to answer the Research Questions. This evaluation framework, which is the first of its kind is based on the evaluation models of Adamson and Morris (2007, p.277), Diamantidis and Chatzoglou (2012, p. 890), Hubball and Burt (2004, p. 54), theories of Kirkpatrick (1950) model, Hutchinson and Waters (1987) while incorporating the theoretical framework presented in Chapter 3, which is making this evaluation framework more comprehensive and customized for the workplace *EOP* training context.

**Figure 6: Evaluation framework for *EOP* training programs in the workplace**



The information pertaining to program design (training needs analysis, course content and material, class size, class time and teacher's qualifications), program implementation (conception of teacher's role, views and understanding of teaching and learning, student's learning styles, learning strategy, personality, motivation, occupational specialization and work experience, assessment requirements), vocational context (human resources training and development policies, climate and environment, resources and support), workplace *EOP* training effectiveness (intended outcomes, unintended outcomes, difficulties in learning/workplace English use, sustainability of learner autonomy, international business communication performance, sustainable livelihoods) collected from different workplace *EOP* training programs provide answers to the questions in the evaluation framework, which ultimately addresses the Research Questions of this study. Evaluating the effectiveness of workplace *EOP* training involves incorporating different perspectives of program evaluation methodologies and approaches, with particular focus placed on empirical investigation in process evaluation and impact evaluation in the relevant practice and policy contexts.

### 3.7. Chapter summary

This chapter has reviewed the theories and methodologies in training program evaluation. Training effectiveness can be evaluated using theories and methods such as process evaluation, impact evaluation and effectiveness evaluation. The effectiveness evaluation framework follows comprehensive conceptual framework. Program evaluation theories for language programs are also reviewed. There is also the cost-benefit analysis methodologies which are applicable in evaluating workplace *EOP* training programs. Different curriculum evaluation models are used as the basis for evaluating workplace *EOP* training programs, for which an evaluation framework is constructed. So far, the theoretical framework has covered previous studies in the global context. In the following Chapter 4, the review of literature moves to examine the Chinese context in Hong Kong and mainland China.

## CHAPTER 4

### REVIEW OF WORKPLACE *EOP* TRAINING AND LEARNING RESEARCH IN THE CHINESE CONTEXT

This chapter reviews previous studies in Hong Kong and mainland China which are typical of the Chinese context. The focus of review is on English language in Hong Kong Special Administrative Region (HKSAR) and mainland China, English language and continuing education policies in Hong Kong and mainland China and the workplace *EOP* training in Hong Kong and mainland China. This chapter serves as the background for the subsequent Chinese context study. It introduces the important role of English in the socioeconomic development of Hong Kong and mainland China and presents the policy background, the current workplace *EOP* training practices and the existing challenges or problems that are awaiting researchers to solve.

#### 4.1. English and English language policies in Hong Kong

In Hong Kong, the official language is English. However, since the handover of the colony to the Chinese government in 1997, there has been a shift of language planning focus from “Cantonese monolingual to a trilingual system for Cantonese, English and Putonghua” (Poon 2011 in Baldauf and Nguyen,



2012, p. 622). The HKSAR Government has been facilitating ranges of language enhancement schemes for both school students and the workforce since the last two decades (Li D. C.S., 2011, p. 97).

According to Evans (2000), while Hong Kong was shifting from “labor intensive manufacturing to service oriented economy” (p. 199), the majority of the workforce was required to possess a higher level of English proficiency. However, in the past two decades, Hong Kong was having “declining English standards in the schools and the workplace”. Government started to develop educational and language policies to maintain the language standards (p. 192). These policies for enhancing language standards range from reforming the primary curriculum, subsidizing university language enhancement schemes to the workplace English campaign (Education Commission, 1996 in Berry and Mcneill, 2005, p.372).

Moreover English use in Hong Kong started to be “taught and used widely” since the 19<sup>th</sup> century and the special type of Hong Kong English was gradually developed and studied by linguists though Hong Kong English was still not accepted officially by teachers in a survey (Chang, 2011, p. 194). In the case of Hong Kong, globalization driven by technological innovation has brought challenges and opportunities to English language teaching. There has been

increasing effort to promote the use of web-based teaching platform and student-centered teaching in Hong Kong's English language classroom, while the value of multiculturalism is also being reinforced as the city strives to be an international city under the influence of technology and globalization (Jor, 2004).

However, EF Education First (2013) reported that while the HKSAR government is making efforts to maintain language standards through various subsidy schemes, adult English proficiency has “not yet improved” (p. 15).

#### 4.2. Hong Kong's continuing education policy

The role played by the HKSAR government in human resources development can be summarized as “assessing the manpower needs and trying to meet them through funding of education and training, as well as monitoring the regional labor needs and considering how they may affect the workforce” (Lee and Lam, 1994, p. 23). Since 1998, the HKSAR government has started to address the increasing needs of continuing education by implementing different continuing education policies. As Cheung (2006) stated, “the development direction was driven by market supply and demand” (p. 995).

In 2002, the HKSAR government set up the continuous education fund (CEF) to subsidize individuals who participate in “continuous education and training programs. The aim is to help people pursue continuous learning, thereby preparing Hong Kong’s workforce for the knowledge-based economy. Eligible applicants will be reimbursed 80% of their fees, subject to a maximum sum of \$10,000, on successful completion of a reimbursable course”. To improve the CEF funded courses, these programs are linked to the “Qualifications Framework (QF)” (established in 2002, according to Cheung, 2006, p. 996) and “Specifications of Competency Standards (SCSs)”. Since 2008, CEF funded courses have all been accredited by “Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ)” (CEF, 2013a). Groups of English training courses including workplace English courses receive CEF funding and are benchmarked with international English tests, as specified in the workplace English campaign. In addition Hong Kong Vocational English programs are also aligned with Council of Europe Framework, Hong Kong Qualifications Framework and Workplace English Campaign benchmark to ensure the course standards (CEF, 2013b). Cheung (2006) however, indicated that these government funding schemes tend to focus on “short-term performance” and “undermine long-term goals and strategies”. There is also “inconsistency and duplication” in the policy formulation (p. 1003).

In addition to the government allocation of funds for workplace English training courses, there are occasional in-house staff development activities. According to the two wide-scale surveys conducted by Hong Kong productivity council (1986) and Vocational Training Council (1991), companies also allocated funds in staff development and offered such incentives as “reimburse their course fees, let them go for training during office hours, promote them after training and give a financial prize” (Lee and Lam, 1994, p. 92) in earlier times. Later company English training initiatives were funded by CEF and other funding schemes such as “Tested Loans Scheme” and “Self-development Allowance in Tax Assessment” (Cheung, 2006, p. 998). In reviewing Hong Kong’s continuing education policy, we also look at the company human resources training and development initiatives and their endeavor in workplace English training programs both on site and off site.

#### 4.3. Workplace *EOP* training research in Hong Kong

In the case of Hong Kong, workplace English campaign was launched in 2000 by the HKSAR government, to enhance “public awareness of the importance of having a good command of English in a workplace environment and to improve the knowledge of English among the working population in Hong Kong”. Since the initiation of WEC, Hong Kong-based corporations all started employee

workplace English schemes in diverse and flexible ways. TNT, Sheraton, JP Morgan etc. showcased "best practice" workplace English training and development activities (Workplace English Campaign, 2012). Meanwhile, workplace English benchmark was designed for "six job types", i.e. "clerks, executives/administrators/associate professionals, frontline service personnel, low proficiency job type, receptionists/telephone operators and secretaries" (Hong Kong Workplace English Benchmark, 2012b). The workplace English benchmarks have been aligned with international business English examinations and Hong Kong Vocational English programs from level 1 to level 4, in both written and spoken forms (Hong Kong Workplace English Benchmark, 2012a). Moreover, international tests of "*English for Commerce/Business, English for Business Communication, English for Office Skills, Spoken English for Industry & Commerce, Written English for Tourism*" etc. have been used to assess employees' level of attainment in workplace English learning (Hong Kong Workplace English Benchmark, 2012c).

In the context of workplace English campaign in Hong Kong, ranges of training bodies offer different workplace English courses. In the 1993 Employee Retraining Scheme, *Practical English, Vocational English* and *English for Waiter/Waitress* courses were offered (Cheung and Tang, 1997, p. 62). At the current time, Employee Retraining Board (ERB), responsible for 800 different

courses for industrial workers, offered workplace language training courses. The “Generic Skills Training” in its 2012 course prospectus included workplace English language courses, i.e. Basic English for the workplace, and Workplace English listening, speaking, reading and writing at both beginner and intermediate levels. Moreover, it also offers *English for Interviews*, *Report Writing and Presentation Skills*, *Workplace Social English* and *Spoken English for Executives*. For each of the workplace English certificate modules, course content, entry requirements, course duration, course mode (half-day or evening) and course fees were specified clearly. Different training bodies will provide the courses to the enrolled employees at different levels (ERB, 2012).

In this case of ERB, as independent funding and regulatory organization, relevant study has found that their training model was dominant with behavioral model. The focus is on “pure learning problems and manipulation of the work environment to sustain outcomes”. Meanwhile, training is “primarily conducted in form of classroom-based and formal group activities” (Cheung and Tang, 1997, p. 12). Moreover, the training model also considers the perspectives of “learning from experience, impact of context, action and reflection, learning to learn and worker as learner” (Cheung and Tang, 1997, p. 24). This Hong Kong workplace training model has the elements of “training objective, training focus, construction of knowledge, participation of workers, format of training

and concept of management”, the content of which will vary case by case (Cheung and Tang, 1997, p. 26). All of these workplace training elements are considered important in influencing the workers’ retraining effectiveness including for workplace English language training.

In the previous Hong Kong context studies on workplace training, for surveys on language use in the professional workplace, Evans’s study (2010, 2011) has found English was commonly used as a language of written communication, with Cantonese used as the main medium for oral communication. Evans (2013b) further described the important role of written English communication in professional workplaces in Hong Kong. For English communication skills training, Evans (2012) has worked on developing email writing activities based on the empirical findings concerning the linguistic features of email chains. Evans (2013a) further discussed the challenges and difficulties of business English presentations in Hong Kong’s workplaces, as revealed through the survey results. Also in the Hong Kong context, Bremner (2012) investigated the process of language socialization and attainment of professional discourse by a Chinese intern in a Hong Kong public relation company. However, so far, there been no specific research to investigate the effectiveness of English communication training in Hong Kong’s workplaces.

#### 4.4. English in mainland China

The roles of English were recognized in the study on English languages in Asia mainly as “a way of speeding up national development, understanding other cultures, and a tool of international communication in the globalized world” (Chang, 2011, p. 202).

In this context, researchers worldwide from different perspective interpreted and studied systematically activities of teaching and learning English in mainland China’s unique social, economic and cultural context. Adamson (2004) analyzed the history of English in Chinese education from the perspectives of “policy document, syllabus and teaching material designs” (p.5). In the contemporary period of 1993 onwards, it was indicated that the phase of “integration with globalization” has increased the “role and status of English” in mainland China. China’s entry into WTO has introduced business, trade, study and tourism exchange opportunities at the international level (p.169). The rising role and status of English in mainland China was also echoed by series of language policy shifts since 1977 to present with the “focus on English and modernization”. At the present stage, “English language teaching in China has become more international” when China is also “getting more global” in a series of global events (Lam and Chow, 2004, p. 235).



Learning English in the China context can be also viewed as a cross-cultural dialogue of western and eastern cultural belief, such as the eastern Confucianism and western Christianity (Lo, 2009a). Learning English is "an integral part of the education process in China", from China's primary school up to tertiary institutions (Bian, 2009, p. 155). The role of English in the curriculum was viewed as "a tool to know the world", to interact with "native speakers, discuss topics of interest to Chinese and express Chinese viewpoints and values" (Orton, 2009a, p. 147). In the case of mainland China, the trend of globalization has facilitated integration of language and culture in teaching English as a foreign language. The understanding of cultural differences enabled students to overcome cultural barriers in foreign language learning (Li, 2004). Since PRC's host of 2008 Olympic Games and World Expo (2010), English learning in mainland China has increased dramatically. The ability to use English has become a skill for survival in mainland China's workplaces (Chen, 2004). It was also indicated that in order to meet the challenges of WTO and Olympic, mainland China's primary schools started to offer *EFL* classes from the third year on decided by PRC Ministry of Education (Yuhua, 2002). New programs in addition to university education were also developed for English learning, such as Crazy English which made English learning more prevalent and entertaining (Li, 2009; Adamson, 2004; Li and Moreira, 2009).

Equally popular programs were established by New Oriental School in mainland China which offered chances for Chinese students who aspire to study abroad to improve their English ability by passing ETS TOEFL and GRE. New Oriental School has already been one of the largest and most successful language training organizations in mainland China.

The teaching of English expanded and has become big business since 1990s, when mainland China engaged more actively in the tide of economic globalization. English has become an industry, in which English teaching and learning was seen as a commodity to be marketed, purchased and consumed (Wang, 2004). In the study of Li and Moreira (2009) *English Language Teaching in China today*, it was indicated that English learning has transformed from the “development of general writing, speaking, reading and speaking skills to acquisition of market-oriented competences and knowledge of other cultures” in the current context of mainland China becoming “world factory” and “multinational market” with “economic success to attract more entrepreneurs”. Meanwhile English language training was differentiated between private school and public school, in terms of the change from examination-focus to learner-centered approach at the time when “ELT market is booming and becoming a lubricant industry” (p. 181).

The increasing role and status of English in mainland China has also generated the investment of resources and scholarly research in teaching and learning activities. Issues such as developing students' communicative competence in the language classroom have been emphasized. Studies have also been conducted from the perspectives of "sustaining self-directed learning in the Chinese context" (Snow, 2004), "using media to teach culture-specific gestures in the Chinese context" (Zhao, 2004) and "willingness to communicate in the Chinese *EFL* classroom" (Peng, 2004). Chinese learners' characteristics have been summarized as "being disciplined and attentive, interactive, collective and jointly constructed" in the language classroom, shaping the "culture of learning" (Peng, 2004, p. 251).

#### 4.5. Role and status of English in TVET in mainland China

The rising role and status of English in mainland China have provided broad socioeconomic and cultural contexts for researching *EOP* training in the current workplaces in China. Workplace *EOP* training, a kind of on-the-job English language competence development activity, is being counted as corporate training in mainland China's TVET system. Concurrent to the growing importance of English in mainland China in general, the role and status of English in mainland China's TVET system are also rising due to the efforts to

align with international standards and practices in public and private companies. According to Zhao and Coniam (2009), from the “government policy perspective”, English has already become a key constituent of essential competence for the workforce due to its increasing use in global economic activities, up to “80% in the Asia Pacific economy” (p. 339). English is a compulsory subject provision of secondary vocational schools in mainland China and efforts have been made to standardize the nationwide English proficiency in the sector by developing benchmark vocational English proficiency assessments. Moreover, there has also been a group of research on vocational English teaching and learning in vocational colleges, vocational secondary schools and workplaces within the TVET system in the Chinese context.

From the TVET system perspective, both PRC’s Ministry of Education and Ministry of Human Resources and Social Security have special divisions responsible for the policy making and policy document production for TVET and Adult Continuous Education. Ministry of Human Resources and Social Security PRC (2005) described that mainland China’s vocational training system with the components of Occupational Categories and Occupational (Skill) Standards, Vocational Training, Vocational Skill Certification and Qualification, Skill Competition and Vocational Skill Talent Awards. There are

more than “4000 occupations” (1838 ongoing occupational standards). For the training of vocational skills, “4400” vocational schools, “2700” employment training centers, “22000” corporate training centers and “20,000” social (private) training organizations are producing millions of talents per year. Moreover, in 2010, Ministry of Human Resources and Social Security Official statistics showed that the scale of vocational training has increased with more focus on modern agriculture, modern manufacturing, information technology and modern management, with an output of “3 million medium and advanced level trained specialists”.

Mainland China’s TVET system was described by Wu and Ye (2009) and Guo and Lamb (2010) in which mainland China’s TVET system is being compared internationally. Cooke (2005) also depicted the TVET system in mainland China as similar to those in other countries, which separated from formal education, consists of two provision groups, “TVET institutions and employment organizations” (p. 87), including large corporations such as China Telecom, Siemens, Procter and Gamble, Motorola, Bell Alcatel, within their internal corporate universities.

According to Wu and Ye (2009), mainland China’s TVET can be divided into “19 main categories” and “78 secondary categories” of specialties, including

“manufacturing, biology, chemistry, pharmacy, finance and economics, tourism, resource development, material and energy sources, civil engineering, water conservatory, electronic information and law” (p. 105). *EOP* can be linked to TVET. In the TVET institutional context, Nursing English, Tourism English, Business English and Financial English are usually compulsory in the respective curriculum. In the workplace training context, the teaching and learning of *EOP* are more practical and specific to language use in daily work of business and industry.

Theoretically speaking, *EOP* training in the workplace and vocational education are “seen as part of a continuum” involving applied linguists, TVET educators and adult educators to work together. In the earlier context of U.S. with the industrial shift from manufacturing to service, the new workforce requirements included such effective literacy skills as “reading, communication, developmental skills and group effectiveness” (Gillespie, 1996, p. 21). In the context of mainland China, as English becomes increasingly critical in the TVET system, particularly *EOP* in the workplace, it is important to learn from successful experiences of effective workplace training program delivery to develop suitable training programs capable of preparing the workforce for effective global business communication.

#### 4.6. Why do mainland China's employees need *EOP* training in the workplace?

The development of English learning in mainland China has created different views about the value and purposes of learning English. Chinese language learners of different ages have various reasons for learning English. For example, high school students spend years preparing for college entrance examinations or further study abroad. According to surveys of mainland China's tertiary teachers and students, English learning has brought practical benefits such as "getting a good job", "exchanging ideas in English" and "China's economic development concern for accepting English to spread in the country". English is considered "beneficial" which "provides access to science, technology and international trade", enables cross-cultural communication and "sustained economic growth" (Orton, 2009b, p. 271 - 293; Lo, 2009b, p. 294 - 300). Pan and Block's (2011) recent investigation into teachers' and learners' language beliefs in China in the context of global economy found that "both teachers and students recognized" the "instrumental value" of English as global language and the significance of English to mainland China's economic development in its internationalization process (p.395). The reasons which motivated the English learning were "more opportunities to career", "window to the world" and "being international" (p.396). For most of the Chinese learners

in the investigation, English has become an important skill to “make one competitive in the job market” (p. 398).

For employees in the workplace, learning *EOP* is to meet job-related and career development needs. Learning *EOP* enables learners to continue professional study, read or translate technical materials, communicate with foreigners, which are also instrumental (Shang, 2007; Chen, 2004). Meanwhile, according to a survey of Sinopec English training participants, a majority possess a deeper level of motivation for learning *EOP* to make preparation for competition in the future compared to short-term instrumental purposes (Zhou B. Q., 2007). It is indicated by Shang (2007) that *EOP* learning incorporates the context of language use, types and terminology of English in the industry and communication skills development.

On the other side, companies also invest in human resources training and development activities, which have already become a “multi-million dollar business”. The 2008 figure showed that U.S. companies invested “an estimated \$134 billion on employee training and development” (Paradise and Patel, 2009 in Noe, Tews and Dachner, 2010, p. 280). The main incentive is that the current “demanding and fast-paced business environment requires employees to refine



and add to their skill sets through their careers” (Molloy and Noe, 2010 in Noe, Tews and Dachner, 2010, p. 280).

Chinese companies are also recognizing the importance of human capital development and investing heavily in workforce training activities. According to PRC Ministry of Human Resources and Social Security (2005), corporate training centers and private training organizations have the largest share of vocational skills development, which organized training for 30 million talents per annum. The training topics ranged from leadership development, communication skills training to management development. The focus of this research is on employee workplace *EOP* training programs. The statistics from PRC Ministry of Commerce in China Foreign Investment Report (2005) suggest that more than 450 multinationals coming from U.S., U.K., Germany, Japan, Singapore, France, South Korea and Australia etc. establish subsidiaries in China. China is one of the top destinations for foreign direct investment. Chinese global companies such as Hua Wei (Luo, Cacchione, Jenkins and Lu, 2011), ZTE, Alibaba, Haier, China Merchant Bank, Bank of China etc. have been launching going global initiatives in the turn of the 21<sup>st</sup> century and opening subsidiaries overseas. This has generated large volumes of global business communication activities in China’s corporate context and increasing

needs for workplace English training to enhance employee global English business communicative competence.

#### 4.7. Mainland China's English language policy

In mainland China, English is the first foreign language (Zhou, 2003 in Baldauf and Nguyen, 2012, p. 621). Since 1978, English language education has started to serve the needs of “four modernization” (in agriculture, industry, national defense, and science and technology) and contributed to the social, economic and political reforms (Zhou and Sun, 2004. p. 328; Jin and Cortazzi, 2004, p. 119). Chinese English learners acquire English competence in both formal and informal ways. Even the taxi drivers and police officers in Shanghai are starting to acquire “practical English phrases” in order to provide better service (Jin and Cortazzi, 2004, p. 131). Gil and Adamson (2011) indicated that English has been widely used in different areas of the society though “English has no official status in mainland China” (p. 25). Meanwhile the Chinese government is not holding a “positive or favorable attitude toward English” (p. 38).

For mainland China's professional English including Workplace English, for example, Medical English Test System (METS) has been developed to evaluate nursing practitioners' English proficiency in the medical context. Mainland

China's Ministry of Human Resources and Social Security Vocational Skill Certification Center (2002) has developed from basic level 5 ~ to expert level 1, layers of professional English standards, aligned with TOEIC. Communicative competence of reading, writing, listening and speaking skills is described in the competency framework, for different occupational groups, including customer service, civil service, business managers, and chief executives. The TOEIC certificates will be issued along with the professional English proficiency certificates by the ministry in China. Meanwhile, public and private companies are also using international test and certification systems such as TOEIC in assessing their incoming employees' communicative competence proficiency (TOEIC, 2013).

#### 4.8. Ministry of Education PRC Adult Education and TVET Division

Ministry of Education, PRC's Adult Education and TVET Division has special responsibility in regulating corporate employees' skills training and development to promote the leading role of businesses in further developing the TVET system (Huang, 2013a).

As its priority task, PRC's Adult Education and TVET Division also conducts regular statistical calculations and analyses of the TVET work nationwide. The

recent statistics of the Ministry showed that the overall training percentage has reached 45.38% in 2007, with advanced technical staff taking up 19% of the total workforce. 1.54% of the salaries have been allocated to workforce training and development (Ministry of Education PRC, 2007).

Meanwhile, PRC Ministry of Education Adult Education and TVET Division is promoting the culture of learning organization and the development of knowledge workers within the companies (Huang, 2013b). Ministry of Education PRC is partnering with Ministry of Commerce and the Ministry of Human Resources and Social Security in promoting the roles of industry and companies in TVET's development (Ministry of Education PRC, 2013).

However, there haven't been substantial policy documents specific to workplace English training program development discovered in the Ministry of Education, PRC Adult Education and TVET Division portals. Nevertheless, the existing policy documents have proven valuable in promoting the construction of learning environments and policy contexts for developing workforce skills for employability.

#### 4.9. Ministry of Human Resources and Social Security PRC TVET Division

Ministry of Human Resources and Social Security has also provided a policy document context for the skills development of technical workers and specialists among Chinese workforce.

For instance, *2013 Vocational Competence Building Key Focus* has been on promoting the workforce development of high skilled labor, promoting Technical and Vocational Education and Training job, promoting the reform of polytechnic institutes, and conducting talent assessments and vocational skill contests (Ministry of Labor and Social Security, 2013a).

Another big project of the Ministry is on the *Knowledge Updating of Specialists*. The main task involves coordination of talent development project, brand building of training project, construction of national continuing education base, study abroad project and some foundation work (Ministry of Labor and Social Security, 2013b).

The Ministry organizes various skills accreditation, training institute evaluation and technical skills contests, in the meantime. These government level activities and initiatives guide the design and implementation of the workforce training

and development in the companies, in terms of setup of benchmark (e.g. *China's Professional English Standards*) and policy parameters.

#### 4.10. Studies of workplace *EOP* training in the context of mainland China

In mainland China, EF Education First (2012c) reported not only strong regional variation in English demand and proficiency level in different regions, but also among employees from different industries and job levels (p. 7). The EF survey found that “internationalized sectors use English while national sectors don’t”. Correspondingly, the survey found the more internationalized “travel, tourism and consultancy have the strongest English skills” while “those focusing on domestic market, such as education, public sector and retail are weakest in English” (p. 10). The report said English language training should be more standardized within formal schooling and “tailored, multi-platform learning program available 24 hours”, in the “ability, quality, and goals required in English learning” (p. 25).

Ipsos MORI market research report (2009) indicated the presence of low-, medium- and high-cost English training programs in mainland China, delivered in “mainly large classes taught by domestic teachers using traditional methods and textbooks for exam preparation” and “small classes taught mostly by

foreign teachers focusing on listening and speaking”. There has also been growing development in “computer-aided teaching and online training”, which can overcome the shortcomings in “practicing oral English”. Major English training service providers include Wall Street Institute (with a corporate English training department for 300 corporate clients) and EF Education First.

In the actual corporate environment, changes always happen. In the U.S. context, the trends of globalization, “continuous quality control or improvement, increased cost constraints and advancing technology” have led to the “higher level skills needs”. From the workplace knowledge and skill perspective, there could be higher demands on workplace linked “reading, writing, oral communication and personal management” skills. It is recommended for the “reading teacher” to “incorporate more technical and non-prose material”, “writing teacher” to include “new formats of written communication and new ways of organizing information” in a “team-oriented environment” and “speech teacher” to “add business presentation and training methods as well as meeting facilitation and participation skills” which provide trainees with “hands-on training exercises” (Robinson, 1998, p. 99).

In mainland China’s corporate context, the challenges stem from globalized production, international standard of product quality and human resources,

which require employees to prepare for the transformation of business. The strategic importance of international business English communicative competence has also enabled the workplace training to be in close connection with job tasks. Similar to the U.S. context, mainland China's workforce also has to prepare for the global communication needs in the forms of reading, writing, oral communication and skills in the modes of telephoning, presentation and meeting. The difference lies in the fact that in mainland China, English is a foreign language and Chinese is the native language. This has brought in the reality that mainland China's workplace training and learning have to consider the targeted job-linked needs more carefully and the trainees have to learn *EOP* in the meantime with acquisition of business English communication skills.

In mainland China's workplace *EOP* training program context, based on the literature study there are problems in workplace English language program development and implementation. Relevant research in the context of mainland China has raised the communicative competence concept originated from Chomsky in the West and the communicative teaching approach can be applied to teaching *EOP* by task oriented, student oriented approach, case study, situational and multimedia approaches (Chen, 1998; Guo, 2011). Later studies suggested that *EOP* could be taught using methods such as comparison, association, scenario for specific terms and vocabulary and content-based



approach and case studies for discourse learning (Li, 2006). More recent studies on business English teaching have indicated the evolution from “intuition-led practice” to “content-based teaching”, and to “research-based practices”. Findings of the study have indicated that “*ESP*” and “business discourse studies” contributed to the development of business English teaching in mainland China. Moreover, the literature has also called for the cultivation of “business expertise” rather than teaching only “language skills and subject knowledge”. Thereby, an integrated approach to teaching business English has been adopted after 50 years’ development in the mainland China context, to have interdisciplinary combination of “subject knowledge, language skill and business practice”. The business related English curriculum offered by Department of English in universities is covering “business knowledge, business discourse and business practice” based on professional expertise theory of “disciplinary knowledge, professional practice and discursive competence” (Zhang, 2007). Business English program should also include the nurturing of cross-cultural awareness as essential element of learning and teaching content (Gao, 2005; Wang, 2007). In the officially released BA program in Business English, language knowledge and skill, business knowledge and skill, cross-cultural communicative competence, humanity competence as well as professional practice have become the core elements of the curriculum. Diverse task-based teaching methods have been proposed

including case method, simulation, project-based teaching and multimedia web-based teaching (Chen and Wang, 2009). Moreover, in Yu's (2011) study, English major programs in two Chinese universities were consulted regarding integrating technical communication into the curriculum, which can enhance *ESP* education.

Compared with the university business English classes, workplace business English communication training covers a much broader disciplinary knowledge in the authentic business context. The training context is more service than language education oriented, as there is institutional influence, occupational or industry specific needs and job task effects on the use of language. Peter Clowes has initiated the study of workplace *EOP* training needs in China. The study has generated empirical evidence of *EOP* training needs which link closely with job, industry, occupational and work environments. The organization types range from service, manufacturing to chemical corporations. Driven by greater foreign investment activities, *EOP* learning needs increase in the events of telephoning, meeting, traveling, contacting with customers and suppliers in the departments of sales, purchasing, engineering, distribution and management. The skills needed are fluent business communication, listening, business experience, high-level of knowledge and business acumen. It is

concluded that the training needs are beyond the language scope and are more multidisciplinary (Clowes, 1994).

Later, mainland China's workplace *EOP* training studies have focused on the application of western teaching methods in the eastern Chinese workplace training scenarios, such as "situational methods" and "audio-visual methods" originated from U.K. in the 1960s, which has been incorporated into the training process in mainland China. In the past 20 years, there have been different types of language teaching methods adopted in the mainland China training context (Lin, 2005). The western adult education mode such as "cooperative/collaborative learning" based on which the adult learning theories have been applied to the workplace employee *EOP* training (Yan and Li, 2009).

There has also been an empirical study of Oxford's theory of learning strategies on "Chinese professional technicians' use of language learning strategies" (Feng, 2004). The workplace *EOP* training in China has been delivered along with the training of job skills, creativity, teamwork, time and personal management, as well as image and psychological training. Case method, role play, and workshop are some of the training methods incorporated (Xiang, 2009). Some studies have focused on cultivating English to achieve employees' cross-cultural competence and international communication skills (Zhang, Fu

and Wang, 2004; Li, 2010) whereas others on *EOP* training have centered on industries such as nuclear industry in Guangdong (Guo, Nie, and Xie, 2011) and aviation industries (Li, 2002).

Nevertheless, in describing the research context of workplace *EOP* training in China, studies have generated different empirical evidences. Some are describing training program problems and offering solutions by identifying corporate language learning needs, English practice outside by pronunciation practice, English for pleasure, formal and informal English use at work (Murphy, 2005). Problems such as lack of connection with employee work, poor teaching methods and too many theories can be solved by tailoring the courses, using situations and multimedia technologies (Xie, 2010). The workplace *EOP* training method could also be problematic in that it may prove too monotonous, inefficient, too theoretical and without systematic planning. The countermeasures could be more diverse training content by either short-term workplace intensive training course or long-term strategic workplace English learning (Gan H. Y., 2008; Wang, 2009; Zhou J. H., 2007). In the field of English training in multinationals, the training content could cover language, cross-cultural education and *EOP* to directly prepare employees for working in certain industries through short-term courses, long-term training and autonomous learning (Liu, 2008). Other strands of studies have prescribed the

status of workplace *EOP* training and identified the training needs in different workplaces. The current status could be summarized that workplace *EOP* training is lacking in long-term strategic commitment. The workplace *EOP* training approaches need to be more diverse, customized and broad-based. Learning climate is needed in facilitating the learning process (Ren and Li, 2009).

However these problems covered in the Chinese context studies are mostly based on the writers' personal observations and experiences in workplace *EOP* training. These studies have not fully addressed the issues of assessing how effective these programs are in helping Chinese employees to develop business communicative competence, based on empirical investigation, which is lacking in the literature in the field.

#### 4.11. Chapter summary

This chapter has reviewed contemporary theories in English teaching and learning in Hong Kong and mainland China, which is becoming more instrumental, driven by global economic, social and cultural change, under the policy background of language, TVET and continuing education in the Chinese context. This chapter has also reviewed the previous studies on workplace *EOP*

training in Hong Kong and mainland China. Workplace *EOP* training in China is largely ineffective, due to the lack of systematic research. Workplace *EOP* training in Hong Kong is highly effective and advanced, thanks to government funding support during the period of Workplace English Campaign since 2000. Hong Kong's successful experiences can be used in developing workplace English training programs in mainland China and inform this Chinese context study.

## CHAPTER 5

### RESEARCH DESIGN AND METHODS

#### 5.1. Overview of research design and methods

The research design and methods used in this study are developed based on the methodology framework built up from a review of language program evaluative studies, in which comprehensive data collection methods (either quantitative or qualitative) are used to ensure the gathering of sufficient and complete information on the language training program effectiveness, learner's progress and learning outcomes and the program impact for evaluative study purposes.

For example Lynch (1996) cited an example of Brazilian *ESP* program which was having primarily naturalistic evaluation by collecting data from “questionnaires, interviews, reports on class discussion and statistics on using the language center” (p. 36). In the needs analysis research aspect, Flowerdew (2013) summarized that *EOP* in the workplace needs analysis tended to adopt an “ethnographic approach” (p. 338) in gathering data on *EOP* training needs in the workplace. This study also advocates the use of naturalist evaluation and ethnographic approach by basing the researcher within the existing *EOP* programs in the workplaces to obtain a deeper understanding of the training effectiveness and the influencing factors.

Moreover, Ekkens and Winke (2009) found it difficult to measure the effectiveness of workplace English training programs in the U.S. context using “standardized tests” and there hasn’t been significant improvement in learner’s performance after “30-hour instruction”. Learning gains have been measured using qualitative instruments of “learning journals”, which include “increased motivation, confidence, willingness to communicate, and job satisfaction”. More recently, in New Zealand, Marra, Holmes and Riddiford (2011) evaluated the program success by comparing the participants’ performance in the classroom and workplace through qualitative methods such as “interviews, journal entries, observation, focus group discussion, meetings in the workplace and reports from employers” (p. 98). This study also considers the difficulty of gathering standard assessment data to quantitatively measure the training effectiveness. The researcher therefore chooses to use qualitative methods such as interviews, workplace and classroom observation, communication in the workplaces etc. to report the short-term learning outcomes after the program completion, the progress in the job performance in the long term and the influencing factors.

Furthermore, the recent review of methodologies in language learning and teaching research has shown that qualitative research plays “an important role”



in the relevant field. The most frequently used qualitative approaches are case study (used in 225 of 477 qualitative studies, 22% of the qualitative articles in the surveyed language teaching and learning journals) (Benson et al, 2009). This study also examines selective samples of workplace *EOP* program case studies from various sectors to have a better knowledge about the issues of training effectiveness.

In this study, the theoretical framework is linked with real-world practice of workplace *EOP* training programs compared across occupations (technical and office work) and industries (manufacturing and service). Based on the international and local reviewed theoretical framework, this study aims to address the two major research questions, i.e. How effective are *EOP* training programs in preparing employees for global business communication in the workplace? and What factors contribute to and hinder the effectiveness of *EOP* training programs in the workplace? by investigating the effectiveness of workplace *EOP* training programs and the influencing factors in both Hong Kong and mainland China context. The research design and methods are summarized in the **Table A 1**.

The selected research instruments include both one-on-one and focus group semi-structured interviews with workplace *EOP* trainers and program

stakeholders (human resources managers and business representatives) in Hong Kong and Wuxi, mainland China to answer both of the research questions, learner surveys taken by workplace learners from different occupational, industrial, and organizational contexts to answer research question 2, and case studies in three complete workplace *EOP* programs in Wuxi, mainland China. The case studies employ several research instruments including semi-structured interviews with training participants, CEO or human resources managers, participant observation, workplace observation, trainer's self-reflection report to answer the two research questions, learner survey, material evaluation, documentary analysis to answer research question 2 and learner self-assessments, pre-course and post-course *EOP* aptitude tests to answer research question 1.

The major research instrument adopted in this study is the in-depth qualitative interviews in both stage one and stage two. The benefits lie in its ability to provide rich information on the effectiveness of the training programs and the influencing factors, in which researcher can analyze the process of program design and implementation. Other research instruments such as learner survey, observations, material evaluations, documentary analyses and trainer's reflections play minor roles in this evaluative study. Nevertheless these research

instruments provide different perspectives that enhance the understanding of the training program development and implementation process.

In this study, the exploratory nature benefits from detailed analysis of insider and outsider views, observation of employee performance in the training programs, trainer self-reflection, and other training stakeholder standpoints regarding the effectiveness of *EOP* training programs in the workplace and the influencing factors.

**Table A 1 Summary of research design and methods**

Stages of study	Instrument	Number of participants	Focus	Data analysis
Stage One: Qualitative interviews and learner surveys in Hong Kong and mainland China	Semi-structured interviews with policymakers (individual or focus group)	4	Perceptions of workplace <i>EOP</i> training effectiveness and the influencing factors in policymaking on the training issues	Thematic analysis
	Semi-structured interviews with business employers (individual)	4	Perceptions of workplace <i>EOP</i> training effectiveness and the influencing factors in the specific business context	Thematic analysis
	Semi-structured interviews with training providers (individual)	4	Perceptions of workplace <i>EOP</i> training effectiveness and the influencing factors in the program development and implementation process	Thematic analysis
	Semi-structured interviews with working adults (individual or focus group)	5	Perceptions of workplace <i>EOP</i> training effectiveness and the influencing factors from the learner's perspective	Thematic analysis
	Working adult surveys	5	Investigating learner's second language learning strategy use and learning style which may influence the workplace <i>EOP</i> training effectiveness	Descriptive analysis
	Working adult self-assessments	5	Self-assessments of the workplace <i>EOP</i> competence by working adults at the time of investigation by completing written surveys	Quantitative descriptive analysis
	Documentary analysis	17	The in-depth study of the business background and the training and development schemes etc.	Descriptive analysis
Stage Two: Case studies in mainland China	Semi-structured interviews with Human Resources Managers and CEO (individual)	2	Perceptions of the training effectiveness of case studies and the influencing factors from the corporate management perspective	Thematic analysis
	Semi-structured interviews with training participants (individual or focus group)	13	Perceptions of the training effectiveness of case studies and the influencing factors from the employees' perspective	Thematic analysis
	Pre-course and post-course <i>EOP</i> aptitude tests	30	The standard assessment of pre-course and post-course <i>EOP</i> competence	Quantitative descriptive analysis

	Learner self-assessments	13	Training participants' self-assessments of their <i>EOP</i> competence at the time of investigation by completing written surveys	Quantitative descriptive analysis
	Participant observation	47	Trainer's observation of the training process while delivering the workplace <i>EOP</i> programs and the perception of the training effectiveness	Descriptive analysis
	Trainer's self-reflection report	3	Report of the case study implementation process and the perception of training effectiveness	Thematic analysis
	Learner surveys	13	Investigating learners' second language learning strategy use and learning style which may influence the workplace <i>EOP</i> training effectiveness	Descriptive analysis
	Material evaluation	3	Language taught in the workplace <i>EOP</i> training programs by reviewing textbooks, handouts and assessment materials	Discourse analysis
	Documentary analysis	4	Language used in the daily business communication in the written form, e.g. email, purchasing forms	Discourse analysis
	Workplace observation	13	The workplace language environment and climate as an integral part of the vocational context in case studies	Context analysis

## 5.2. The rationale for selection of research sites in Hong Kong and mainland China

According to the EF Education First EPI report (2012a), Hong Kong and Wuxi have comparatively higher level of English demand as required by economic and human development as they are both in urban coastal regions. As for the context of mainland China, there is a clear need to investigate specific workplaces and industries to learn more about their needs and the ways in which they rise to the challenge of training employees to manage communication in increasingly globalized settings.

The differences between Hong Kong and Wuxi, mainland China are connected with history, the role of English, workforce composition etc. They are illustrated in the following **Table A 2**.

**Table A 2 Comparison between Hong Kong and Wuxi, mainland China**

City	Hong Kong	Wuxi, mainland China
History	Colonial period Vs. Post-handover period	After 1978 China's reform and opening up till now
The role of English	Official language in government, companies and MOI in universities	Foreign language in trade, international communication activities and multinational business operation
The composition of the workforce	6.7% in manufacturing; 73.5% paid employees;	30.8% in manufacturing; 30.7% finance and insurance
Key industries	Four pillar industries: financial services, trading and logistics, tourism, and producer and professional services	Solar power, new energy, microelectronics, biology and pharmaceutical; service industries; creative and cultural industry; new industry
English in the Workplace	Working language as a second language: English + Cantonese	Working language as a foreign language: English + Mandarin
Socioeconomic Status	Market economy status	Socialist economy status

This study was partially based in Hong Kong. The Hong Kong statistical monthly digest (2013) indicated that the four pillar industries of Hong Kong economy are “financial services, tourism, trading and logistics and professional services and other producer services”, having brought Hong Kong “HK\$1,113.1 billion” and the employment of “1 703 600 persons in 2011” (p. 4). English language plays an indispensable role in the four pillar industries and the related sectors. Nunan (2003) indicated English is considered key to maintaining Hong Kong’s position as “a major international trading, business, banking and communication center” and a “crucial tool for economic, social, and technological advancement”, which is made explicit in the government curriculum policy documents (p. 590).

In this broad context in Hong Kong, various government schemes have been introduced to financially support employees’ workplace English training. Cutting edge practices in workplace *EOP* training have lead to the selection of research sites for this study. It is considered worthwhile to explore Hong Kong’s corporate English language training practices and success strategies which can be seen as benchmark and guidelines for *EOP* training in the workplaces in other parts of China.

This study was also partially based in Wuxi (Jiangsu Province), a medium sized city in the eastern coastal area of mainland China with strong economic growth momentum. According to the *2010 Wuxi National Economic and Social Development Statistical Public Report*, by the end of 2010, the city had 144 joint ventures invested by 75 foreign businesses in the Fortune 500 ranking. Around 50% of the high tech businesses in Wuxi are foreign invested, while 49% of the export products are high tech. The outsourcing service industry is also strategically significant, ranking among the top 3 in mainland China. Active and productive international economic cooperation has created 59 overseas investment projects. In these global business activities, English is playing a strategic role in ensuring the smooth business operation and successful global communication activities.

In Wuxi, mainland China, international companies often organize workplace English communication training programs for employees with different levels of English proficiency on occupation or industry specific topics. Clustered with strategic manufacturing businesses in the textile, machinery, electronic, software outsourcing, animation, shipbuilding and home appliance industries, *EOP* training in these workplaces not only helps employees enhance business communication competence with overseas clients and suppliers through different communication channels, i.e. email, telephone, fax or



videoconferencing, but also facilitates effective and efficient international business operation. This promotes both international business growth and industry internationalization, which generate strategic competitive advantages.

Compared to other regions in China, this cross-sector investigation is considered typical and leading the trend in the field. This study does not necessarily generate information that can represent other parts of China, but the information is providing insightful and credible understanding (Patton, 2002). In addition, the workplace *EOP* training practitioners in Wuxi, mainland China and Hong Kong can borrow experiences from each other. In particular, the success examples from the Hong Kong context can inform the evaluation of workplace *EOP* training programs in the mainland China context, based on the constructed evaluation framework in **Figure 6**.

### 5.3. Stage one: qualitative interviews

#### 5.3.1. Qualitative interviews

Relevant stakeholders of workplace *EOP* training programs were identified from different industries and occupations and invited for semi-structured interviews. They encompass the training provider side, including corporate training providers, and business trainers, as well as human resources managers

or business representatives who need *EOP* training from different occupational and industrial perspectives in China (including the mainland and Hong Kong).

#### 5.3.1.1. Choice of participants

In this study, stratified “purposeful or purposive” sampling has been used. The study aims at identifying practical “good practice” examples from training companies and industrial operators with potential or existing training needs or experiences, based on researcher’s decisions on appropriate sample selection (Guest, MacQueen and Namey, 2012, p. 251; Neuendorf, 2002, p. 88). The choice of participants is stratified in terms of age, gender, occupation, industry, business, company, and location. Each of the participants is expected to provide insightful expertise regarding the implementation and evaluation of workplace *EOP* training programs.

This study invited eight participants from Hong Kong and nine participants from mainland China for qualitative interviews from June to August, 2012. Each of the participants is working in different business sectors or public organizations. The participants are chosen through a convenience sampling of people involved in training programs in Wuxi, mainland China, and research projects in Hong Kong. The participants are selected based on the criteria that

they represented major groups cross-sector stakeholders in workplace English training in Wuxi, mainland China and Hong Kong, and played an essential role in its future development. Taking into consideration the socioeconomic and cultural differences in these two cities, each of the stakeholders described their experiences and expectations of workplace English training in their workplaces.

The total 17 workplace English training stakeholders are categorized into four major participant groups: policymaker representative, training provider representative, industry representative and working adult representative. To ensure confidentiality and anonymity, pseudonyms are used for each of the participants and organizations (See **Table A 3**). In the working contexts, the majority of the stakeholders are identified by English names, and in workplace English classes, program instructors refer to training participants by English names. Thus, there are English pseudonyms used in this study for convenience of identification. Codes are used for the organizations the participants represent to ensure corporate confidentiality.

**Table A 3 Participant profiles**

Participant	Gender	Location	Group	Company
Susan	Female	Hong Kong	Policymaker	Employee training administrator and regulator A
Helen	Female	Hong Kong	Training provider	Public vocational English training provider E senior management
Carrie	Female	Hong Kong	Training provider	Public vocational English training provider F workplace English training

				practitioner
Mary	Female	Hong Kong	Training provider	Workplace English trainer and researcher G
Henry	Male	Hong Kong	Training provider	International organization P offering workplace adult English training courses
Paul	Male	Hong Kong	Industry representative	Business manager H in a public company in electricity
Frank	Male	Hong Kong	Industry representative	Business manager I in a public company in transport
Chris	Male	Hong Kong	Industry representative	Multinational human resource consultancy J
James	Male	Mainland China	Policymaker	Human resources training and development center B
Zoe	Female	Mainland China	Policymaker	Personnel examination center director C
Alex	Male	Mainland China	Policymaker	Training organization D
Jerry	Male	Mainland China	Industry representative	Multinational food production company K
Steve	Male	Mainland China	Working adult	Multinational production planning company L
Fanny	Female	Mainland China	Working adult	Multinational computer hardware producer M
Cathy	Female	Mainland China	Working adult	International public company N in home appliance sector
Nicole	Female	Mainland China	Working adult	Private trading company O
Milton	Male	Mainland China	Working adult	Private trading company O

These participants are aged between 25~over 50. Their work experiences vary, from two years after graduation to more than 20 years. These participants were

selected because the organizations they represent are the leading players in the respective industry in Hong Kong and Wuxi, mainland China.

From the policymaker perspective, A represents one of the largest workforce training regulatory and funding bodies in Hong Kong, which managed 800 training courses in 2013. Human resources training and development center B and personnel examination center C take leads of the local personnel training and certification system. Training organization D runs English training in Wuxi, mainland China and is currently the market leader.

From the training provider perspective, public vocational English training provider E and public vocational English training provider F in Hong Kong represent one of the most prominent vocational training organizations in Hong Kong. Workplace English trainer G in Hong Kong is one of the most famous researchers and practitioners in the workplace English training field. Henry represents international organization P based in Hong Kong, which is one of the most famous international language service providers. Henry is in charge of adult English training provision for this organization.

From the industry representative perspective, Paul represents one of two electricity companies H in Hong Kong. Business manager Frank in the public

company I has served in the railway operator in Hong Kong for more than 20 years, which is leading the field. Sales director Chris of multinational company J represents one of the leading players of human resources consultancy in the world. Former Human resources director Jerry worked for a large multinational company K in the food production industry.

From the working adult perspective, production planner Steve works in mainland China for global production planning company L, from Germany. Engineer Fanny is employed by the U.S.-based hardware production company, M which dominates the market in Wuxi, mainland China. Business officer Cathy works for the international public company N, one of the finest companies in mainland China's home appliance industry. Nicole and Milton have their self-owned trading company. Since each of the study participants represents leading players of their respective industries, their views should prove insightful for this study.

#### 5.3.1.2. Interview techniques

The researcher invited the selected relevant stakeholders for 16 one-on-one semi-structured interviews. Interview questions were designed in an informal format to elicit answers to the research questions via one-on-one talks or focus

groups on the following four groups of stakeholders. The interview questions are developed based on the multidisciplinary theoretical framework constructed for this study and the evaluation framework shown in **Figure 6**. The interview questions have four sets (see **Appendix 3-6**), customized to different stakeholder groups. The interview questions focused on how workplace English learning needs are collected, and how workplace English training programs are implemented in different companies through tailoring training content, training methods, activities, and materials. The interview questions also inquired of the important roles played by the vocational contexts. Eight semi-structured interviews were conducted in English. These qualitative interviews had an average length of 45 minutes to one hour. Six of the interviews in mainland China were conducted in Chinese and later translated into English. After the interviews were concluded, the researcher transcribed them as quickly as possible. English versions for interviews in English and bilingual versions for interviews in Chinese were emailed back to the participants for verification. Amendments were made by some of the participants to ensure that the information obtained was accurate.

Pilot interviews were conducted with the pre-designed questions in both Chinese and English. Each of the interviews generated a transcript that was about ten pages in length. Based on the interviewees' comments, both the

wording and sequence of the interview questions were revised. This ensured that the questions for qualitative interviews could generate answers in accordance with the theoretical framework.

The group four i.e. five working adults also completed written surveys (see **Appendix 7**) from the learner perspective including profile information completion, open questions, self-assessments, Oxford's (1989a) *Strategy Inventory for Language Learning (SILL)* and Oxford (1993) *Style Analysis Survey (SAS)* (see **Appendix 7**) used in different second/foreign language contexts, to help assess the actual workplace learning style, strategies and aptitude, which complemented the findings from the semi-structured qualitative interviews in the Chinese context study. Then this enables the creation of learner profiles after the SILL scores were calculated as specified, to be linked with the analytical results of the semi-structured qualitative interviews.

The researcher also conducted a document study by analyzing business overviews and workplace English training introductions published on the respective corporate websites. This enabled the researcher to better understand the specific business/industry backgrounds study participants represent.



#### 5.4. Stage two: case study

The research method for the in-depth studies in stage two is case studies to identify the learning outcomes of successfully completed workplace *EOP* training programs in Wuxi, mainland China and the factors that facilitate and hinder communicative competence development in the workplaces.

Determining whether workplace *EOP* training is effective and appropriate is context dependent. It is therefore necessary to select cases in which “information is obtained at various circumstances” (Flyberrg, 2006, p. 230). The study is to evaluate workplace *EOP* training programs in terms of the learning outcomes and their effects on developing employee global communicative effectiveness based on the constructed theoretical framework. In particular, it sheds light on the Chinese context in terms of empirical evidence for effective curriculum design and implementation to have long term benefits for international business development.

##### 5.4.1. Choice of case company

Case study 1: **A private international machinery trading company in Wuxi mainland China** needed workplace *EOP* training because the mechanical

engineers needed to join in machinery training in U.S. for which the medium of instruction was English. The role of the trainer was to help the engineers as well as general manager, customer service representative and accountant to enhance their business English oral and written communicative competence within two months so that these training participants can successfully complete English medium machinery training and improve their international business communicative competence.

Case study 2: **An international heavy machinery manufacturing base in Wuxi, mainland China** conducted *EOP* training for three months. Employees were finding it difficult to liaise with foreign business partners, particularly via email and telephone. Comprehending foreign clients' spoken English was also problematic. This has caused difficulty for the company, which was in the process of merging with its Swedish parent company. The role of the trainer was to solve the problems in business English communication step-by-step and enhance the communicative competence of all department heads and relevant employees.

Case study 3: **A Sino-Italian joint venture dishwasher manufacturer in Wuxi, mainland China** required annual *EOP* training for three months. The general manager was an Italian and had difficulty communicating with his

subordinates, whose English he found incomprehensible. The training program was conducted with all of the office staff responsible for global communication activities in the departments of sales, accounting, quality control, human resources, and production. Their general English proficiency was at an intermediate standard. The overall aim of the program was to enhance the effectiveness of the company operation in China.

#### 5.4.2. Case research process

Research was conducted on the training participants, general manager and human resources officer as decision-makers. The author was the sole workplace trainer. The objectivity of the findings may be affected by the author's direct involvement. However, this involvement also enabled the author to gather richer and more valuable data concerning the class delivery process.

The process for the case research was developed from the *EOP* case research instruments (see **Appendix 2**) designed by Kim (2008, p. 143), Ellis and Johnson (2002, p. 84), Frendo (2008, p. 18) and Friedenberg, Kennedy, Lomperis, Martin, and Westerfield (2003, p. 51). The timing of the case studies was more than one year after the course, in August, 2012, for more than one month. According to Hutchinson and Waters (1987), "this is potentially the

most valuable, since the learners will be in a position to judge how well the course prepared them for the target situation they are now in” (p. 155). Burt and Saccomano (1995) also affirmed that interviews should be conducted “six months or one year after the program completion” to obtain the “a long-term view” of the changes in workplace performance and productivity (p. 3).

In the U.S. context, regarding the evaluation of *ESL* instructional programs in the workplace, Burt and Saccomano (1995) argued that evaluation often uses both qualitative (“focus groups and individual interviews, workplace observations etc.” and quantitative (“tests and performance ratings”) methods. Thus, to ensure the collection of comprehensive case study information, the case research process of this study contains the following parts.

*EOP aptitude pre-course and post-course tests* are designed to gather information about employees’ corresponding levels of proficiency and learning outcomes after workplace training.

*Self-assessments* (see **Appendix 7**) of overall workplace *EOP* competence, reading and writing skills were conducted with 13 training participants to understand their perceptions of the learning outcomes.

*Participant observation* (Lynch 1996, p. 121), based on fieldwork guidelines (see **Appendix 2**), was used to capture the workplace communication needs, on-the-job and in-class training performance and after-class activities, to ascertain whether the *EOP* acquired in the program can make real changes to international business communication activities. Meanwhile, experiment activities such as situated talk in the teaching unit and in-class technical interviews were conducted, recorded, and reflected by the instructors. Participant observation for this study was conducted during the program implementation process on the corporate training site in the corresponding months of 2006 and 2010.

*Workplace observation* was used particularly with the 13 case study participants when they are interacting with overseas clients and suppliers by telephone, email, and videoconferencing and receiving machinery training in English at work during the months in 2012, as a part of the context analysis for case studies.

*Trainer's reflection* focused on the workplace *EOP* program development and the implementation process, perceptions of the effectiveness of the training program and the factors that might contribute to or hinder the program

development and implementation. The reflection provided the trainer's insider view, which is not always accessible to external program reviewers.

*Interviews* based on the interview guide (see **Appendix 3 – 6**) was held in the format of focus groups or one-on-one interviews with general managers and training participants to gather their views about the learning outcomes of workplace *EOP* programs and the extent of the contributions that they make to global business communicative competence development. The interview includes questions about learning strategies, learning styles, levels of learner commitment (Vasan and Sargunan, 1996, p. 52-64), and personality (Eysenck, Eysenck, and Barrett, 1985). The interviews produced in-depth information regarding the learning outcomes and whether the workplace English training and learning programs truly enhanced the employees' business communication performance. They also helped to indicate the extent to which on-the-job autonomous learning can ensure the sustainability of workplace *EOP* training and learning activities. Altogether, there were 15 case study participants for the 11 face-to-face interviews, conducted in focus groups or one-on-one format. There was also one written reply from the human resources officer of company N in the dishwasher production sector. The case study participants were selected for interviews based on the criteria that they had played active roles in their workplace, held key roles in their organization or were recommended by

their CEO or human resources manager, who also joined in the interviews. The interviews were conducted in Chinese and were later transcribed and translated into English.

*Learner questionnaire* with questions devised in Oxford (1989a) *Strategy Inventory for Language Learning* and Oxford (1993) *Style Analysis Survey* (SAS) has been used to assess 13 training participants' preferred learning styles and strategies in the workplace to complement the findings from qualitative interviews. Open questions were also designed alongside the questionnaires to triangulate the findings of second language learning strategies and learning styles.

*Documentary analysis* was conducted to analyze the course materials used for the workplace *EOP* training programs. Lesson plans, audio and video resources, media programs, textbooks and handouts were analyzed, along with feedback from the training participants regarding the program effectiveness in improving the development of their business communicative competence. The course materials were compared with authentic workplace documents collected from the case study participants to examine whether the course materials can facilitate the handling of authentic workplace business communication.

### 5.5. Ethical considerations

Permission was obtained from each of the participants and the case study companies. Each of the participants signed the research consent forms and had basic understanding of this thesis project. They joined voluntarily into the projects and knew they could withdraw from the study anytime as they wished. The participants knew that the study was not having any impact on their current job and business and it would benefit their international business communication on the job. The researcher entered the workplace sites as permitted, interviewed and recorded the interviews and collected the relevant data. The fact that the researcher was also the trainer of the case study programs benefitted the case research process. The direct trainer-trainee relationship enabled the collection of richer evaluative information for the study, and the researcher was able to gain practical insights for evaluating case program development and implementation. There was no financial award for participating in the study. Pseudonyms and codes were used for both the participants and the workplaces to avoid identification of names and addresses. The researcher tried her best to protect corporate confidentiality.



## 5.6. Rationale of data analysis

The data on the effectiveness of workplace EOP program learning outcomes have been analyzed through the evaluation framework to identify factors that facilitate or hinder the development of global communicative competence. The results of the case study consist of unique findings on the effectiveness of EOP training in a particular industrial context.

Part of the qualitative data analysis involved applying the steps of the “grounded theory approach”. Meanwhile, the findings from training program observation field notes, interview transcripts, trainer self-reports, and documentary analysis were also categorized by theme in the evaluation framework and interpreted using the theoretical framework to provide specific answers to the research questions (Bryman and Bell, 2003).

In analyzing the qualitative interview transcripts, the analytic style of “rich description” has also been used to “describe what is happening to answer the questions what is going on here”. This is based on the participants’ responses to the interview questions on their experiences of workplace English training. “Qualitative inductive method” is applied to analyzing the transcripts to draw up similar useful information for the establishment of a workplace English

training model (Gibbs, 2007, p. 4). Technically, “concept-driven open coding” was used, whereby “the text is read reflectively” to identify relevant themes (Gibbs, 2007, p. 44; 50; Strauss and Corbin, 1990, p. 59). As the interview participants come from different workplaces, this enables a “comparative analysis” for “making case-by-case comparisons” between different workplace English training situation and across the geographical divide between Hong Kong and mainland China (Gibbs, 2007, p. 78). In addition, under each theme of the transcripts, best quotes were drawn to demonstrate the effective workplace English training practices different workplaces were adopting and the underlying motivation (Guest, MacQueen, and Namey, 2012, p. 267). The interview transcript analysis was largely based on the themes identified in the theoretical framework and evaluation framework presented in **Figure 6**.

The corporate document review and program material evaluation have been conducted with the instruments of “discourse analysis”. The material value of the documents is examined as possessing special relevance to effective learning outcomes (Weinberg, 2002, p. 187). The discourse of work emails and technical files can help researchers achieve a deeper understanding of the nature of business communication types and the potential effects of workplace *EOP* training on enhancing business English communicative competence.

For the vocational context factors, case context analysis has also been needed based on the organizational observation field notes, in the dimensions of climate and environment, resources, support and sustainability of learner autonomy. The pragmatic dimensions of context analysis in communication settings are also introduced. These include “linguistic contexts”, “non-linguistic contexts” (situation in a physical sense), “features of the social situation”, “features of participants’ common background knowledge”, and “channels of communication” (Auer, 2009, p. 93), to facilitate an understanding of how the contextual factors impact the learning outcomes, effectiveness of workplace *EOP* training, and employee communicative competence development.

Workplace observation and semi-structured interview transcript analysis with various stakeholders provide a broad and comprehensive overview of the training context, within which the effectiveness of various context specific case studies can be evaluated.

### 5.7. Implication to the main study

In the pilot study, there were two English sample transcripts from semi-structured qualitative interviews with a senior executive in the financial service sector. One Chinese sample transcript was generated from a

semi-structured qualitative interview with an adult *EOP* learner. The two transcripts were analyzed using applied thematic analysis or qualitative analysis. The two participants are listed in **Table A 4**.

**Table A 4 Pilot study participants**

<i>Mike</i> , Information technology director in a multinational bank O in the financial services sector <i>Tom</i> , Surgeon in a private hospital Q in the healthcare sector
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Mike has worked for more than 10 years as the technology infrastructure country head in several multinational companies. He is particularly experienced and insightful for the workplace English training and learning in the banking industry. Tom has been working as a hand surgeon in a private hospital for more than five years. He has had occasions in which *English for medical purposes* has to be used to communicate with medical experts in conferences and international exchanges. He has solid experience in the health industry. The pilot interview with *Tom* was conducted in Chinese and later translated into English by the researcher. The results of the transcript analysis are processed by applied thematic analysis and discourse analysis.

The implication of this initial study for the main study is that different companies have very specific detailed requirements in developing and implementing the workplace English training programs. Employees may or may not prefer autonomous self-access way of learning English to traditional

classroom-based training model. The findings in the initial study inform the main study, particularly in designing more context-specific investigation methodologies, such as the interview questions and case studies.

Although some of the factors in the evaluation framework were covered by the pilot interviews, not all of the influencing factors were elaborated. The main study was more comprehensive as it covered all of the influencing factors in the evaluation framework.

Qualitative interview proved both effective and efficient in collecting information of training effectiveness and the factors which facilitate or hinder the business communicative competence development. The interview questions were fine-tuned to suit the specific industrial contexts. The interview questions in the qualitative semi-structured interviews generated a sufficient amount of information for both stage one and stage two studies. In addition, the information collected from other research instruments such as surveys, documentary studies or participant observation was used to triangulate the data findings to answer the research questions.

## 5.8. Chapter summary

This chapter has described the research process for this thesis project. There are two stages of the study. Stage one involves business background study and qualitative interviews of industry representatives to obtain a broad picture of workplace *EOP* training in both Hong Kong and mainland China. Stage two involves three case studies of completed workplace *EOP* training programs to interpret the training effectiveness of workplace *EOP* training, their short-term and long-term outcomes. This chapter has also summarized the major data analysis approaches, which are applied thematic analysis, discourse analysis based on the grounded theory approach and qualitative inductive method. A pilot study has then been conducted which presents the initial outcomes to refine the research instruments.

## CHAPTER 6

### FINDINGS IN THE CONTEXT OF WORKPLACE *EOP* TRAINING IN HONG KONG AND MAINLAND CHINA

This chapter presents the findings collected from the stage one study, relying on in-depth qualitative interviews with policymakers, business employers, training providers and working adults in Hong Kong and mainland China. The aim is to investigate workplace *EOP* training practices in different business sectors and address the research questions How effective are *EOP* training programs in preparing employees for global business communication in the workplace? and What factors contribute to and hinder the effectiveness of *EOP* training programs in the workplace? by investigating workplace *EOP* training practices in different business sectors.

The findings in stage one study served as benchmark model for evaluative case studies in mainland China context in stage two study, generating both successful examples and experiences which informed the construction of a model of workplace *EOP* training program development and implementation in Chapter 11 (see **Figure 9**).

## 6.1. Challenges of workplace *EOP* training and learning in Hong Kong and mainland China's businesses

The analysis of the data has revealed a range of challenges associated with developing and implementing workplace English training programs in Hong Kong and mainland China context. These challenges are classified below as:

- Varied workplace English use and training demand
- Workplace *EOP* training implementation
- Meeting business specific learning needs and performance goals
- Workplace *EOP* trainer's qualification

### 6.1.1. Varied workplace English use and training demand

Some business companies in Hong Kong demonstrated a high demand for business English training while some demonstrated a low demand. Paul, a business manager of a Hong Kong electricity company which is one of the two leading players in the industry, said in the interview that there was few expatriate staff in his company, and colleagues within his company generally communicated with each other in Cantonese. There were occasional specific business writing and presentation training courses organized for the staff in



Paul's company. On the other hand, there are Hong Kong business companies where English appeared to be the major communication medium. For example, Chris, who is a sales director of a leading multinational human resources consultancy, mentioned that 99.9% of corporate communication in his company was in English. Also worthy to note is that there is one type of business company where staff at different ranks use different languages to communicate among themselves. Frank, who is a business manager in the transport industry, leading railway operator, said that managerial level communication was in English whereas workers in the workshop used Cantonese to communicate with each other. Such variation in use of English in the workplace would lead to varied training demand. Business English training courses were organized for the office staff in Frank's company.

In mainland China, due to the fall in international trade volume in recent years, there has been inadequate workplace English use and training demand recently. Comparatively speaking, foreign invested companies have more requirements on employees' workplace English skills. James, who was in charge of the personnel training and development center of the government of Wuxi in mainland China, commented that he organized only "*several training sessions which did not last for a long time (due to lack of interest in learning)*". Another participant in this study, Zoe, who was the director of Wuxi personnel

assessment center also mentioned a relatively low demand for business English training in the city in recent years due to the influence of financial crisis: *“prior to the financial crisis, foreign invested companies tended to need more English training due to the requirements from the expansion of business or product manufacturing. The financial crisis reduced the foreign trade volume, and consequently English skills training needs lowered”*. Training organization director Alex run an English training group. He stressed: *“if more communication opportunities can be given to the learners, English ability can be improved more through practice”*.

In summary, generally low business English training demand was perceived in business companies in Wuxi, mainland China. In the Hong Kong companies, there was apparent variation. There was high training demand in companies where corporate communication is in English and low training demand where Cantonese is used as a language for daily communication rather than English.

#### 6.1.2. Workplace *EOP* training program implementation

In Hong Kong, most workplace English training programs implemented according to standard procedures and performance indicators. One participant, Susan who works for an independent employee training administrator and

regulator, stated that in the programs her organization manages in Hong Kong, there were some program performance indicators for good practice workplace English training in Hong Kong, such as “*placement rate and enrollment*”. The programs were constantly evaluated by surveys to gather training participants’ feedback. Another participant, Mary, who is a famous trainer and researcher in workplace English training in Hong Kong further explained: “*workplace English training should follow standard steps such as those adopted by American TESOL for business programs, which are fairly comprehensive*”.

In Hong Kong, most workplace English training program standards are aligned with a competency framework. Helen who works for a quasi-government public training provider stated the practice of aligning workplace English training program with Hong Kong qualifications framework. Each of the workplace programs is pegged at different levels of the qualifications framework, which serves as the context for training. The program is then developed and “*the intended outcome of each program is clearly spelt out in the curriculum design*”. It is then easier for teacher to develop “*assessment mechanism to assess whether the learner has attained the learning outcomes*”, to ensure the standard and quality of provision.

In mainland China, according to the participants, some workplace English training programs in the companies have been outsourced to training organizations. Fanny, who is an engineer of a U.S.-based multinational hardware producer in Wuxi, mainland China, explained that different types of workplace English classes were provided by the training organizations. They could be “*big class, small class, one-on-one tutorial, salon and also some speech classes*”. Another participant of the study, Steve, who is a production planner of a Germany-based global production planning company in Wuxi, mainland China, explained, at the time of course enrollment, training organizations gave a test to the training participants and the classes were divided into A, B, C for different proficiency levels. Training time was also allocated, for example, Monday and Friday. Classroom-based learning and self-study such as doing assignment were integrated.

However, study participants perceived that language training organizations as external vendors in mainland China sometimes could not develop effective workplace English training programs. They had weaknesses in practice and did not follow standard procedures for developing workplace *EOP* training programs. Alex felt that workplace English training implementation in mainland China was problematic. There was lack of systematic research and

preparation so that some training programs were not tailor made to meet the industrial needs. These workplace *EOP* training programs were less effective:

*Workplace EOP training companies lacked understanding of class size, teaching hour, textbook, teaching methods, teaching objectives. Immaturity of workplace English training lies in syllabus and teaching plan. The workplace English training companies will not tailor for Chinese foreign companies or Chinese companies. It will thus lead to the reduction in effectiveness. (Alex)*

In addition, Alex has emphasized that the quality and standard of workplace English training program provision were not aligned from company to company, as evidenced in the following comment:

*To promote workplace English in China, there should be an authentic standard test and certification system, just like LCCIEB (London Chamber of Commerce and Industry Examinations Board). The current situation is training companies in cities of the region even in the same organization will probably have different requirements for workplace English training programs. (Alex)*

While Hong Kong training providers are making effort to promote workplace English benchmark (2012b) and Hong Kong Qualifications Framework (2012) and to align the workplace English training practices to a competency framework, mainland China's training companies have not yet fully incorporated *China's Professional English Standards* (Ministry of Human Resources and Social Security, PRC, Vocational Skill Certification Center, 2002) into the workplace English training program implementation to ensure the standard of provision.

#### 6.1.3. Meeting business specific learning needs and performance goals

In Hong Kong, the course length, course objective, and the nature of workplace English training programs were explained by the training provider. Mary in Hong Kong stated: *very few will commit to that length of time. Most of them are short courses with performance goals. (Workplace EOP training is related to) people who are in the workplace at different levels across many different industries, with many different purposes*".

Participants perceived that most workplace English training programs were developed based on business needs and they were expected to address the diverse training requirements. Workplace *EOP* training providers not only

solved language problems, but also developed language skills to improve job performance. Another participant Carrie who also works for the quasi-government public training provider in Hong Kong had the following explanation:

*A successful workplace EOP training program links the needs and curriculum. In the teaching process, there will be interactive elements, and the adoption of different learning and teaching methodologies. Teachers will motivate students to learn. During the course delivery period, senior teaching staff will visit the classes for twice. Student comments are collected through course-end surveys and focus group interviews. Revisions will have to be made based on the student feedback. (Carrie)*

From the interview, it was clear that some workplace *EOP* programs provided by local training organization in mainland China did not satisfy this particular requirement of job relevance. One participant Cathy who is a business officer of an international public company in the home appliance sector in Wuxi, mainland China had the following comments:

*The materials are too general as some foreign teacher will give such similar topics as hobbies. The more targeted course the better. Sometimes, the trainer will also have some self-compiled materials. (Cathy)*

Teacher's self-compiled materials are sometimes not tailored to business specific needs. Another participant Jerry who is former human resources director in a Denmark-based multinational food production company in mainland China, thought that: “*(English) teacher often has no knowledge about the food business, and the (English) teacher will only provide some general Business English training*”. Trainer's lack of business or industrial knowledge may make it difficult for the *EOP* programs to target company's needs.

#### 6.1.4. Workplace *EOP* trainer's qualification

In Hong Kong, workplace *EOP* training needs to combine language skills with job requirements. This has especially challenged the professional qualification and business background of the workplace *EOP* trainers. Workplace *EOP* training providers need to have a broad knowledge base and competencies to cope with the challenges. Helen in Hong Kong emphasized the following trainer's competence:



*The most important thing is the ability of training providers to have a pretty good understanding of English language needs and requirements or standards of the industries. Trainers need to have a good understanding of learning theories of different types of learners. (Helen)*

Henry works for an international training organization P, specialized in adult and company training course provision. He emphasized the importance of the trainer's language ability over business background. The trainer serving international organization P all have English teaching qualification. Trainers who train in the companies express interest in business. The experiences of trainers range from five years to more than 30 years. Henry mentioned that trainers of workplace *EOP* training programs need to have the "*classroom management skill*" and the following qualities:

*I think they should be knowledgeable, approachable. They should be able to give very quick on-the-spot feedback. They have to be very good at listening and picking up student errors with the confidence to move away from a lesson plan to be able to highlight emerging needs and to judiciously exploit what the people in the room are saying. (Henry)*

In addition, participants stressed that both English native speakers and Chinese ESL trainers have their roles to play in delivering workplace English training programs. For example, Chris of human resources consultancy in Hong Kong had the following comments on the advantages of a local trainer compared with an English native speaker:

*Half of the English language training programs use a local trainer, with an extremely strong English skill, because it is very difficult to explain the meaning in English and a local reference point is needed for some people to understand, as opposed to a native presenter. (Chris)*

However, in Henry's organization, most of the trainers are native speakers or have native level proficiency of English. This has again demonstrated the emphasis on language competence on trainers in his organization.

In mainland China, participants perceived that usually workplace *EOP* trainers needed to have relevant teaching experience and qualification background. Teachers need to take part in certified teacher training. However, currently in mainland China's workplace English teaching field, Alex perceived: "*there hasn't been such strict management*".

In summary there are apparently challenges to ensure the standard of teacher qualifications in both Hong Kong and mainland China to improve the quality of program provision.

## 6.2. Cutting-edge practices in developing effective workplace *EOP* training programs

Despite the challenges of implementing workplace *EOP* training, there are some innovative practices identified with workplace *EOP* training programs in different workplaces of Hong Kong and mainland China which can inform the subsequent evaluative studies in the Chinese context.

### 6.2.1. Diverse workplace *EOP* training program provision by training providers and industrial companies

In Hong Kong, the majority of workplace *EOP* training programs are provided by public vocational English training institutions, tertiary level professional English training centers, private language training organizations, international language training organization and management consultancies. Most of these public courses are currently regulated by the independent statutory body and funded by the workplace English campaign of the HKSAR government. The

in-house workplace English training programs are sometimes subsidized by the companies. These training programs were further explained by different training providers in this section.

Susan, policymaker A stated that in Hong Kong, among the programs her organization manages in Hong Kong, workplace English training courses must be “*job-related*” and should be “*developed according to market needs*”. To meet their learning needs, the workplace language courses were developed according to the number of course enrollment and were relatively fixed. Susan has the following comments:

*For the workplace language training, spoken English and written English are more often used skills. Vocational skills are important for people with low education attainment and they learn English from scratch to meet employer demands. (Susan)*

Another participant trainer Mary explained that her workplace English training programs were provided to “*government, finance, retail, hospitality, information technology and banking*” industries. They were “*intensive short 20 or 30-hour courses with performance outcomes*”. Helen, of training provider E stated that currently there are two types of vocational English programs in the

public vocational education institution, i.e. “*open courses general for everybody working in different industrial sectors*’ and ‘*tailor made courses in response to specific corporate needs*”. Carrie, of training provider F explained their workplace English training programs had been provided since 2008. Training provider F has around 3.5 years of workplace English training provision experiences. Carrie provided the program details as follows:

*Compared to the 120-hour vocational English open course offered to working adults over 6 - 8 hours, almost all of the tailor-made courses are 30-hour short courses. The open courses for working adults usually have specific course title such as Vocational English Program for Adults (short name as VEA), Listening & Speaking Skills - Workplace Interaction, Listening & Speaking Skills - Social Interaction, Reading & Writing Skills - Workplace Correspondence etc., which are very popular. These open course standards are pegged at Hong Kong Qualifications Framework Level 2, reimbursable by continuing education fund (CEF) allocated by the HKSAR Government. The tailor-made programs were provided to government departments, clerical staff at hospitals, fashion companies, hotels and secretarial staff of the public institution itself. (Carrie)*

Henry explained that as a major training provider of language services, the courses offered include such “*skill-based training*” focus on writing and speaking. The writing courses include “*general business grammar, report, proposals and correspondence*”. The speaking courses include “*presentations, meetings, pronunciation and negotiation*”. There are also specific courses such as ‘*minute taking in meetings, and marketing for aviation or oil industry*’. Other industries organization P serve include ‘*customer service, insurance, IT and hospitality*’. The workplace EOP training programs conducted by training providers in Hong Kong are usually short intensive courses, responding to business requirements and crossing different sectors.

In Hong Kong, companies in different industries also organize diverse in-house workplace English training courses through their human resources departments. Paul of electricity company H explained that Training and Development Manager provided the course information on the intranet. Such courses as “*English Presentation Skills Training and Writing English with Influence and Impact*” are very specific. The course syllabus tells that the course such as “*Writing English with Influence and Impact can take six months to complete and it is conducted by a foreign tutor of a training company in Hong Kong*”. Frank, Transport company I commented that the focus of the language

programs should be on developing English skills on “*writing papers, making presentations*”, in compliance with the business standards:

*A good program is the one that achieves measurable achievements. If improvements in proficiency can be measured, then there is such a good program.* (Frank)

For e-training provision, Chris of human resources consultancy J mentioned that there was a “*training and development center (TDC) online in English, where their candidates can go online and up-skill themselves anytime anywhere, as there are 5000 different programs*” on different topics. It is obvious to see improvement in the staff attending those programs, “*better qualified and better armed with knowledge of the language*”. Chris agreed with Frank, in attending the specific programs on language or other subjects, companies were investing in staff training and they “*want a definite result and expectation*” on staff improvement.

In mainland China, global English training organizations such as *EF Education First, Web International English, World International English* and the public universities’ English Language Centers dominated the local market in workplace *EOP* training program provision. Companies also organize

themselves in-house training programs to maximize opportunities for employees' English communication skills development.

Jerry of food production company K stated that training was provided to both the office employees and *“lower level employees, like workers, technical workers and also the guards as they will also meet some foreigners”*, although their English training level is *“very basic”*. The employees were asked to *“speak English with each other after the training, not only in the working time, but also off the work time, like during the lunchtime”*. However it seems that the program provision in mainland China is not as diverse as Hong Kong's language training providers and industrial companies.

#### 6.2.2. Workplace *EOP* training needs analysis and curriculum development

In Hong Kong, the workplace *EOP* training needs are usually collected in a systematic process before the program commences. Information and views are collected from different stakeholders so that training providers understand more about the business specific training needs.

Susan explained, the overall curriculum was developed by an *“industrial consultative network of 22 employers from different categories of industries,*



*including some professional bodies. These employers express their views on course design and evaluation to ensure the courses always can meet market needs". Mary stressed the workplace English training program "has very different curriculum process from education in colleges. The reason is it is to work with business outcomes, not just language outcomes". The needs analysis can "go from doing a full-scale audit in a company which can take two or three weeks, which is a very detailed needs analysis to something which is not so detailed, depending on what the company wants. The companies may just want one little course for someone or a comprehensive look at their companies and what the communication needs are".*

According to Henry, face-to-face talk before the course commences is an important part of the needs analysis process. The participants' English levels, "*strengths and weaknesses*" would be discussed. Henry found common training demands in "*written communication*", such as in email writing. Sometimes, a "*written test*" was administered to the training participants and samples were collected to ensure the relevance of the training content.

In mainland China's companies, training needs analysis is more concerned with consultation with departmental stakeholders and professional training companies. Fanny, an engineer in computer production hardware company M

explained the arrangement of outside training occurs every half to one year. Trainees underwent pre-training test and post-training test to evaluate the learning outcomes. Jerry, of food production company K explained that the company English training needs were investigated at department levels by distributing “*questionnaires or application forms*” to departments and by raising training requirements at “*management meetings if employees do not have enough level of English to deal with their work*”. Department managers could also have “*meetings with employees to investigate their learning needs and level of English*”. If there were sufficient training needs, outside training organization would be contacted to offer in-house training programs on such topics as “*business English, telephone conversation, email writing or report writing in standard English as well as English speaking, listening and writing in the business context*” for employees who have “*special knowledge and backgrounds*”. Sales and R&D personnel also attended business English presentation training as required by their job.

#### 6.2.3. Tailoring workplace *EOP* training programs to different industries/occupations

To address the specific needs of different businesses and adult learners, workplace English training programs usually focus on authentic scenarios and

information regarding the selection of training topics, materials, activities and training methods.

#### *Corporate training topics*

Trainers Mary and Carrie indicated the range of familiar topics which often appeared in workplace *EOP* training programs. Mary emphasized that the selection of workplace *EOP* training topics was the outcome of working with “*business stakeholders, to reflect the performance requirements in the workplace*”. Carrie that explained different courses had different training topics. The “*spoken English course for juniors*” started with “*greeting in English*” and followed with “*socializing*”. Other courses for “*executives*” may include topics such as “*negotiation and discussion skills*”. For tailor-made programs such as those designed for the fashion companies, the topics included “*telephone skills, socializing, marketing and communication skills*”. The course attainment levels were based on the Hong Kong Qualifications framework. For “*listening and speaking skill courses*”, the course level was at two. For “*Vocational English for Hospitals, hospitality, import and export courses*”, the level was at three.

In mainland China, Jerry indicated that there were “*many topics from the working scenarios to the daily life*”.

## *Materials*

In Hong Kong, for tailoring the workplace English training materials, different stakeholders, i.e. policymakers, training providers and in-company employers each shared their observations on material adaptation to meet business specific needs. Policymaker A Susan explained that handouts prepared by the trainers were used instead of the textbooks. Training agencies also have “*standard training materials*”.

Henry explained that his organization had an international network to produce a “*bank of materials*” to draw on. There is the organizational standard of materials, in terms of templates and standard expressions. These materials are then adapted or customized to fit the Hong Kong market. Materials for company courses are usually adapted further according to corporate “*needs and standards*”, to include the language and processes in the company.

Paul of the electricity company H also mentioned the use of handouts and textbooks such as the “*grammar guidebooks*” by the course tutors. Frank of transport company I advocated the use of templates in teaching “*writing and presenting in English*”. Frank argued that “*the writing exercises administered by trainers should create a meaningful discourse, which is extremely difficult to*

*teach but necessary to master*”. Chris of human resources consultancy introduced the company’s self-made materials from its online learning center with a history of “60 years”, for which the “*examples*” could be provided to the training personnel when they entered the business.

Companies in mainland China have varied practices in choosing materials and in adapting them to meet business specific needs. Steve of production planning company L, commented that “*practical*” materials such as handouts and business English vocabulary files were quite useful. However, Steve mentioned that there were job specific needs so the business English vocabulary probably was not used often. Fanny of computer hardware producer M reported that trainees preferred handouts to textbooks. The handouts included “*listening, speaking, reading and writing*” exercises. For example, trainers would provide trainees with “*short passages*” and explanation can be given for better comprehension. In these two examples, handouts were personalized to meet the course needs of the tailor-made programs.

### *Methods*

Helen indicated that there were many class activities in the workplace English training programs such as role plays, case studies and discussion. Mary

explained for workplace *EOP* training, there was no fixed method, depending on the student levels and the “*performance requirements*”. Mary cited examples of using “*simulation*” for training spoken English, “*authentic texts*” for training written communication and “*small or big*” group training. Workplace *EOP* trainers needed to be prepared with a “*repertoire of skills and selecting the best, depending the result of needs analysis*”.

Henry explained that in the programs provided by his organization, case studies were commonly used activity as the basis of speaking and writing materials, which provide the “*general overview of the style and skill*”. Presentation was also an important part, which was more related to training participants’ “*hands-on construction and analysis of their work*”. Moreover, Henry stressed the standard of the activities of “*speaking and writing in a certain style and as much as possible authentic situation*” was put into the program.

Paul and Frank had the following observations. Paul recommended “*role play, case studies, and presentation, just like in management courses*”, whereas he felt it was not necessary for tutors to train workplace English communication through “*authentic work scenarios*” and simulation of the “*work situation and operational reality*”, as it is time consuming. Frank stressed some fundamental principles of teaching English in the workplace which was to create

opportunities for people to “*improve English through reading, writing, talking and presenting*”. Frank had the following comments:

*Role play in workplace English programs is more relevant to stakeholder engagement and communication. For a language course, it is more important to develop the freedom to make mistakes, communicate, write, read and present.* (Frank)

Workplace *EOP* training programs also differ in selecting suitable training methods and activities for companies in mainland China. Alex suggested giving training plans to professional training organizations for better training arrangement. Trainers should get prepared for the scenario-based oral English training while learners should study the course plan to prepare for oral English practice.

Cathy summarized in her example of workplace *EOP* training class, in which “*oral communication, scenario-based learning and oral interaction*” were used. The expatriate teacher set the situation and engaged in practical communication with the learners by raising such questions as “*What is your responsible department now? What are your customer’s main needs? What is your yearly*

*sales volume of the washing machine?*”. Corrections and feedback were provided.

Fanny’s workplace English training format was often similar to a Salon with a relaxing atmosphere. Trainers “*give some topics*” and trainees talked in different roles. The training content was not necessarily relevant to job.

*Job-related training in non-language subjects and the application of training methods to workplace English training programs*

Frank, Paul and Chris shared their views on transferring training methods from non-language subject training courses to workplace English training programs. Frank explained: “*Life skills training, leadership training organized in the company would have similar mentality as workplace English training*”. Paul explained that his company had “*leadership and coaching program on project management*”. Employees had chances in “*executive or management education*” to “*go abroad or attend management programs organized by Hong Kong universities*”. The case study method was used and the medium of instruction was English. These offered employees good opportunities to improve English through content-based instruction.



Chris's company invited training providers either "*locally or from overseas subsidiaries*" to train "*IT, sales or product knowledge*". In the internal training, "*role play and case study*" have been used as the training methods. In these examples, training methods and mentality from other subjects can be applied to workplace English training classes.

In mainland China, Jerry mentioned, sometimes, employees would have to learn not only English but also specialty knowledge in the product training in English. For sales training, people were invited from outside for training. Jerry mentioned: "*methods for sales training can also be used in English, such as role play, conversations or cases*".

Steve further commented, according to different job posts, there was different focus on training. Although the training language was "*95% in Chinese*" in the training of "*lean production and production material control, business manner*", employees had chances of experiential learning through visiting and observing the company plant for the "*lean production (Toyota production system) process*". This more lively experiential learning method can be transferred to workplace English courses.

In addition, Cathy introduced the company “*sharing platform*”, which housed the knowledge of washing machines including “*English materials with professional terms*”. Training topics such as “*orientation, work ethic, technical training*” were also provided online in Chinese. The online sharing platform can also be a good method for training workplace English for providing resources and support to trainees.

In mainland China, the tailoring of training programs is largely reliant on existing textbooks and handouts rather than hands-on authentic materials collected directly from different workplaces to solve real world communication problems. In addition to the traditional training communicative teaching methods of using case study, role play and simulation (Brandl, 2008), mentoring/coaching has also been used in addressing business communication problems with customers.

#### 6.2.4. Climate and environment

In Hong Kong’s workplaces, a big contrast in the workplace communication training and learning environment can be found. The level of English use largely depends on whether the working language is mostly English or Chinese. In addition to using English corner, direct provision of learning resources either

by the training providers or the companies, is also preferred as a method of constructing the workplace English learning environment.

Mary supported resource provision in the workplace to create the necessary climate and environment:

*The more learning resources in the workplace English training programs the better. Some workplaces have resources. And if they are well developed and targeted, they are very useful, as a kind of self-access learning platform. Access to English is important, whether at work or other learning places. (Mary)*

Helen further mentioned that employees were encouraged to further improve their English through methods such as “*creating a better English learning environment, organizing outside classroom English activities, providing e-resources*”.

Companies in Hong Kong have different ways of promoting English learning in the workplace. While Paul felt that continuing English learning depends on the individual commitment, Frank found good way of promoting English learning such as “*Karaoke, going to watch English movies, having discussions or read books*”.

In mainland China, according to the participants, companies organize English communication activities to create English learning atmosphere. Chatting with expatriate colleagues has also proven to be an effective way of improving international business English communication skills. Employees are also encouraged to practice English after work. Alex thought it was more effective to “*study English in an English environment*” or use English as the “*working language such as being a service attendant in the five-star hotel*”. Jerry explained that employees were “*sent out to participate in English competition organized by the city government*”. His company provided “*English tapes, textbooks, story books in English in the library for employees to borrow. In addition some news on the television from headquarters is in English, which can be broadcast for employees to see and learn*”. Both resources and opportunities were provided to employees to improve their English.

#### 6.2.5. Resources and support

This section resources and support centers on the issue of having classroom-based training or online training program provision only in delivering the workplace *EOP* training programs.

In Hong Kong's workplaces, a blended model is usually preferred to include both face-to-face formal training and online self-access learning. Training providers also address online English learning needs, although most of the workplace English courses take place in the classroom.

The issue of selecting online or face-to-face training cannot be generalized. For example, Susan explained, in ERB funded courses, there were *“no online courses or E-learning courses. There were only face-to-face courses offered. The distance learning mode is an area worth future exploration”*. Mary indicated that it was difficult to generalize the issue of providing face-to-face training or online learning platform to training participants. It depended on the *“level of staff, the kind of industry and the type of individuals”*. Mary thought that *“senior people will have less time and will choose the online mode. More junior people will prefer to have more face-to-face training”*.

On the other hand, Helen of the public training provider E reported they were in the process of developing *“web-based language programs”* to complement face-to-face training. Thus, a blended mode of training was to be provided. Henry explained that although online learning platforms offer flexibility, it cannot substitute formal classroom teaching with *“immediate feedback”* and inspiration to the training participants. Henry's organization P also developed

an E-learning platform called *Learn English* which offered an option of learning which supplemented face-to-face teaching.

Chris argued from his experience that, classroom-based training is often more successful than online training. Chris commented that how to set up the course such as “*role play, interaction, testing etc.*” was up to the “*needs of the business and staff*” and required “*a lot of creativity behind to keep people’s interest*”. However at the current time, a “*hybrid of formal learning and interactive learning between learner group*” was more common in the workplace English training practices. Chris thought that compared to classroom-based training, the online English training was more effective for learners with “*a reasonable level of English and a good understanding of English language*”.

Frank emphasized in his company that training by “*electronic means*” was more suited to the “*technical competencies training as one can measure the effectiveness of how much is learned*”. On the other hand, Frank commented “*classroom-based course*” suited more the training of document writing as it relied on the “*line managers to review the progress in grammar and documentation skills*”.

In mainland China, E-learning and online learning software sometimes can provide a good platform for the self-study of English, which is supplementary to face-to-face classroom teaching.

James reported: *“for professional knowledge teaching, online delivery is better. However English training skill needs face-to-face classroom model”*. Steve, speaking from his learning experience, preferred self-study. He used the online learning software “*Rosetta*” and “*100%*” relied on self-study as channels of learning.

#### 6.2.6. On-the-job communicative competence development

In Hong Kong, on-the-job communicative competence development is considered a feasible way of improving workplace English skills. In the case of Paul’s electricity company, employees were given opportunities to engage in on-the-job learning by *“reading English materials, meeting foreign guests in international global business activities such as international exhibitions and conferences”*. Chris suggested running training programs *“parallel to day-to-day work”*. Trainers can identify the business needs and target at the specific requirements. Training can take place in the morning and trainees can *“implement it in the afternoon or the next day”*.

However, Hong Kong's training providers argued that on-the-job communicative competence development has more limited functions than the formal workplace English training programs. Helen, the public training provider hesitated sending the training participants such as *“junior executives back to work”* as they *“don't really have a lot of practice and they use English for very limited purposes”*. Helen's programs usually *“generate a high level of motivation and interest among the learners, pushing to increase their desire to want to improve their English at every level”*.

In mainland China, on-the-job communicative competence development can be realized through problem solving such as in international trade processes. Milton, vice president of a private trading company O, explained in his job of international trade, there were many problems, such as in bargaining, offering quotation and rounds of bargaining. Much learning took place on the job.

#### 6.2.7. Human resources training and development policy

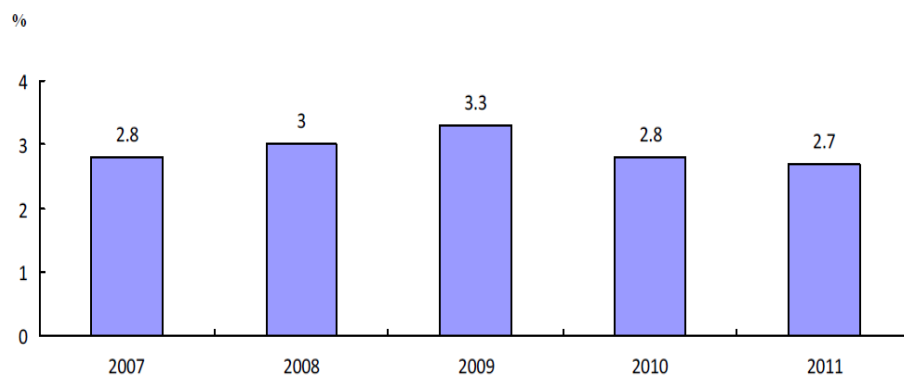
Hong Kong SAR government initiated workplace English campaign in 2000 and launched the continuing education fund to subsidize workplace English training and learning activities. Mary has found a lot of training happening



since the training subsidies were provided through the workplace English campaign.

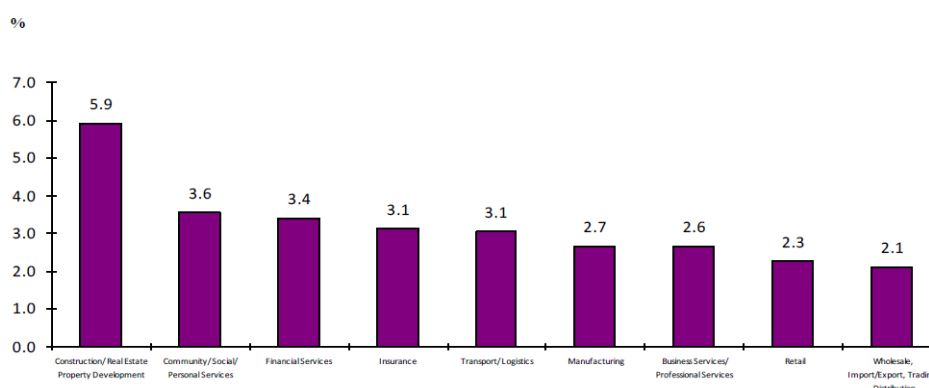
Hong Kong's companies have also invested in workforce training and development activities including language training activities. In Hong Kong 2011, 2.7% of the annual salary was allocated to training and development activities (See **Figure 7**). The allocation of training budget also differed by business sectors (See **Figure 8**). (Hong Kong Institute of Human Resources Management, 2011).

**Figure 7: Training and development budget against total annual base salary (2007-2011)**



[http://www.hkihrm.org/ihrm\\_eng/ih\\_pre\\_01.asp?id=138](http://www.hkihrm.org/ihrm_eng/ih_pre_01.asp?id=138)

**Figure 8: Training and development budget against total annual base salary by business sector**



[http://www.hkihrm.org/ihrm\\_eng/ih\\_pre\\_01.asp?id=138](http://www.hkihrm.org/ihrm_eng/ih_pre_01.asp?id=138)

It is a part the human resources (HR) strategy. For example, regarding the HR Strategy for employee training and development, Paul's company reported that their HR strategy and policy were designed to help people "*SHINE*", the short names of "*Synergy, Holistic Development, Ideal Workplace, Nurturing Future Leadership, and Excellence*". Paul's company saw language training "*as an important part of employability skills development. In 2010, the company training hours amounted to 37.7 hours per employee, i.e. 4.7 days of training, higher than the average in Hong Kong*".

In comparison, Frank's railway company made even larger investment in training and development activities, including language training programs. It is also a part of the employee promotion packages. Frank's company allocated "*6 days a year for worker training, double that of Hong Kong, in not only English*

*and technical skills, but also managerial skills*". That's a large spending when transforming the allocation of hour to salary expenditure.

Moreover, Henry observed that "50% of the companies" fully funded the workplace English training programs. "40%" of the training programs were subsidized. Otherwise employees would not be willing to pay to attend the training.

However, Chris casted doubt on linking salary increases directly to passing a language course. Chris argued that companies can offer one-off rewards to employees such as "*resort or hotel or a restaurant voucher*" or reimburse for the course fees as recognition. But the company would not link "*permanent ongoing financial reward for passing a course*".

From the government perspective, in Wuxi, mainland China there have not been detailed HR or financial policies to encourage employees to learn English. Rather, companies are stipulating their own HR policies. According to Zoe, the local policymaker, at present the HR Bureau does not have specific policy documents. The Bureau of Commerce probably has more needs in the English business. The focus of HR Bureau is the vocational skills training, such as

mechanics. The training of vocational skills on foreign trade has not been listed as a focus of HR Bureau's job.

In the companies, there are different HR training and development practices to facilitate employees' workplace English training and learning activities. Jerry explained, the company organized in-house training at its own costs. Employees were given "*special rewards as bonus if they get good English marks' and recognition in 'the evaluation of performance'*". But it would not be linked to salary increase.

Cathy explained the recruitment and training policy in her company. In her admission process, the company evaluated her English in the interview. If her English had been better, her salary could have been higher. English training was organized regularly when the company's business was good.

Fanny explained that in her corporate situation, course fee reimbursement or half reimbursement was offered if, after one year, the training participant passed the course. Training budget for example of 5000 RMB was allocated for English training.

#### 6.2.8. Learner assessment and program evaluation

In Hong Kong, evaluation immediately after the workplace *EOP* training is common practice, for quality assurance of the training programs and employee performance assessment. Short-term outcomes are measured. However few training programs measure long-term outcomes. It is more worthwhile to conduct an impact analysis of the training programs on the job performance.

For example, Helen of public training provider E explained, at the current time, “*student feedback questionnaire, survey and focus group with students*” had been used to gather “*general feedback*” from the students on the curriculum or the training program as a whole if it was tailor-made for employees. Moreover in the years to come, Helen’s organization planned to do more to assess the training effectiveness through evaluating the “*job performance in terms of improvement in English language skills after a certain period of training program*”, based on the Kirkpatrick model. Carrie described the evaluation process:

*Feedback is usually collected from the training participants right after the end of the program. Senior teachers will sometimes visit the classes and observe the class delivery. Interviews with students will also take place at*

*the end of the program to understand the impact of the workplace English training programs. (Carrie)*

Further, Mary said the main thing was to look at the impact, through an impact analysis of communication training on the job, which was the most meaningful program evaluation for workplace training:

*Workplace trainers do a lot of kind of feedback forms or assessment, they are not as powerful as actually doing an impact analysis on whether job performance is improved. (Mary)*

In the example of Henry, workplace *EOP* training programs have been evaluated by discussing with the company “*decision-maker or HR*” about the training provider’s performance. To evaluate the training effectiveness, students self-evaluated their performance to compare pre-course and post-course differences. Henry stressed that in the “*longer courses*”, students would be “*tested in and tested out*”, using the copyright standard test materials. In the skill-based shorter courses, the test subject was usually related to the course topic, such as “*mini-report for a report course*”. “*Questionnaire*” would also be “*sent to the students and the decision-maker*” to evaluate the customer satisfaction.

Paul from the electricity company perspective also indicated that end-of-course survey to collect feedback from employees was a kind of quality assurance procedure. So far, the workplace English training programs received positive feedback from the training participants.

Chris further explained there was “*always feedback*” as a part of the training program. However, “*very few training programs offer short-term result*”. The return of the programs can be “*six months to three years, depending on the complexity of the program. It’s very difficult for the training programs to be measured quickly*”. The training participants needed to implement the training outcome and continue their learning. In summary, Chris commented that it was the good company which measured both short-term and long-term learning outcomes. They reassess the training gap and address the gaps by organizing another training program. Only “10%” of the training programs in the market were having such good conduct.

In mainland China, the workplace English training effectiveness is usually measured by standard tests, performance in English activities, line manager's job review and contribution to business.

Zoe explained: *“it is mainly to look at whether the training is useful to the business and whether it can help businesses operate”*. Fanny from the corporate side explained employees were assessed in the final speech in which the *“department heads were invited to attend and evaluate employees’ improvement”*. Cathy commented as the company needed improvement after investing in training, employees were tested after completing the training. Positive encouragement was given to employees if they performed well in the test. Otherwise, there would be the deduction of money spent on training participants. Training has been viewed as a kind of corporate investment on employees with the aim of improving job performance.

The interviews with 17 stakeholders in mainland China and Hong Kong have shown that there are challenges ahead in ensuring the standard of program provision. The cutting edge practices discovered in this chapter offers solutions to the challenges raised by the interview participants. **Table A. 5** summarizes the challenges of workplace *EOP* training in mainland China and Hong Kong and offers coping strategies drawn from effective practices.



**Table A 5 Challenges of workplace *EOP* training and coping strategies in Hong Kong and mainland China**

<i>Challenges in mainland China</i>	<i>Challenges in Hong Kong</i>	<i>Coping Strategies</i>
Workplace English use and training demand		
Mainland China <ul style="list-style-type: none"> <li>Low demand for business English training due to international trade volume downturn and financial crisis</li> </ul>	Hong Kong <ul style="list-style-type: none"> <li>Uneven workplace English use and demand</li> <li>Insufficient opportunities of practicing oral English in some local companies</li> </ul>	Hong Kong and Mainland China <ul style="list-style-type: none"> <li>Give learners more English communication opportunities</li> </ul>
Workplace <i>EOP</i> training program implementation		
Mainland China <ul style="list-style-type: none"> <li>Shortage of systematic research in class size, teaching hour, textbook, teaching methods, teaching objectives, syllabus, teaching plan;</li> <li>Individual standards to meet different program requirements</li> <li>Workplace <i>EOP</i> training program not standardized in a qualification system</li> </ul>	Hong Kong <ul style="list-style-type: none"> <li>Align training program design and assessment with Hong Kong Qualification Framework</li> <li>Follow standard steps in implementation including setting the objectives and goals, writing lesson plans, developing materials and training approaches</li> </ul>	Hong Kong and mainland China <ul style="list-style-type: none"> <li>Follow program development guidelines in job-related English training</li> <li>Follow good practice workplace English training programs;</li> <li>Use standard test and certification system, i.e. LCCI, <i>China professional English Standards</i> etc.</li> </ul>
Meeting business specific learning needs and performance goals		
Mainland China <ul style="list-style-type: none"> <li>Workplace English training materials not tailored to business needs</li> <li>Training content not relevant to business needs</li> </ul>	Hong Kong <ul style="list-style-type: none"> <li>Different workplaces/people/departments/industries have diverse requirements</li> <li>Most are short courses with performance objectives</li> </ul>	Hong Kong and mainland China <ul style="list-style-type: none"> <li>Tailoring program content and materials by using authentic scenarios and examples from the workplace</li> <li>Tailoring programs to level of attainment such as in HKQF</li> <li>Use interactive role plays, case studies or simulation often</li> </ul>

Workplace <i>EOP</i> trainer's qualification		
Mainland China <ul style="list-style-type: none"> <li>• Need to have relevant experiences and teaching qualifications</li> <li>• Need certified workplace English teacher training</li> <li>• Lack of strict management on workplace English trainer's English ability, teaching technique and experiences</li> </ul>	Hong Kong <ul style="list-style-type: none"> <li>• Need a broad knowledge base and the competencies to enable industrial transferability</li> <li>• Need to understand industry language training needs and requirements</li> <li>• Need to understand different learning theories</li> <li>• Need to have the appropriate personal qualities</li> <li>• Need to apply effective teaching skills in the workplace classrooms</li> </ul>	Hong Kong and mainland China <ul style="list-style-type: none"> <li>• External professional language training organization outsourcing</li> <li>• Continuous teacher professional development</li> <li>• Conduct thorough needs assessment prior to the program commence</li> <li>• Use company's internal training resources in the case of large organization</li> <li>• Teacher accreditation e.g. LCCI</li> <li>• Need both language teaching experience and business background</li> </ul>

In Hong Kong, there is great variation in workplace English use since the HKSAR government launched bi-literate trilingual policy to normalize the use of Chinese, English in written form and Putonghua, Cantonese and English in oral form. For multinational companies with more expatriate colleagues, more workplace English is being used as corporate language, which increased the workplace English training demand. Therefore, in companies where there is less English communication opportunities, English use environment should be created where the corporate communication is more in English. In mainland China, there is not adequate English use environment, particularly within those local companies where Chinese is used as their corporate language. In contrast, employees in foreign companies have greater opportunities of improving their English skills. This has lead to insufficient workplace English training demand in mainland China. In order to improve the circumstances in mainland China, the Chinese government needs to develop favorable policies to promote workplace English use in the companies so as to further facilitate international business communication and exchange. More English communication opportunities need to be given to employees in mainland China's companies.

In the program implementation in Hong Kong, the current practice is the quality of program provision is constantly monitored and evaluated by regulating body such as Employee Retraining Board who guarantees the quality and standards of program implementation. These measures can ensure the quality of program

provision in Hong Kong. In mainland China, the findings revealed that most of the workplace *EOP* training programs were designed at an ad hoc basis. Few were considering their long-term business impact. In this regard, it is suggested that workplace *EOP* training should align with a qualification system, such as mainland China's professional English standards or international certification system such as LCCIEB. Workplace *EOP* training program implementation should follow program development guidelines in job-related English training, workplace curriculum and good practice workplace *EOP* training. A significant improvement in workplace *EOP* training standard in mainland China is needed.

In meeting business specific learning needs and performance goal in the implementation of workplace English training programs, the study findings showed that Hong Kong's businesses may have different requirements for workplace *EOP* training. Workplace *EOP* training providers in Hong Kong are also advised to tailor programs to level of attainment such as in Hong Kong Qualifications Framework, use interactive role plays, case studies or simulation more often. In mainland China's programs, training content was irrelevant to the businesses or not tailored to the specific industrial context. The solution is program content and materials should be tailored by using authentic scenarios and examples (e.g. templates) collected from the workplace, in addition to textbooks or handouts. The problem of tailoring workplace *EOP* training

programs to business needs is caused by difficulties trainers may encounter in gathering relevant authentic materials for training which was explained in an *ESP* case study by Edwards (2000) in the German banker study. This training program has the problems of “time constraints and access to authentic materials”. This case study relied on ready-made textbooks and trainer’s own experiences rather than information collected from needs analysis and the instructional design. Kim (2008, p. 18) argued that workplace English training needs to take into account the “contingent variables and the contextual constraints” to be effective in program development.

For the workplace *EOP* trainer’s qualification, in Hong Kong context, the challenge lies in that workplace *EOP* trainers should be prepared with diverse knowledge and skills for the demanding tasks of teaching in the business context, with an understanding of adult learner’s characteristics (Venter, 2002, p. 93; Shen, Lee and Chan, 2002, p. 57). Workplace *EOP* trainers in Hong Kong also need to conduct careful needs assessment prior to the program commence and use company’s internal training resources such as those offered by large organizations. Diverse language teaching experience and business background are important for workplace *EOP* trainers in Hong Kong. Workplace *EOP* trainers should also have the suitable personal qualities to cope with the challenges of teaching for the business. Continuous teacher training

should be organized to ensure workplace English trainers possess the necessary skill set. In mainland China teacher accreditation and management is not as strict as that of English teachers for primary and secondary schools, as workplace *EOP* training has been officially recognized in adult and continuing education sector. Workplace *EOP* trainers face tough demands from the business context. The solution is workplace *EOP* trainers can also be strictly accredited and certified by such organization as LCCIEB and Cambridge English Language Assessment.

The major solutions to cope with the challenges of workplace *EOP* training in mainland China and Hong Kong include to promote workplace English training and learning in the workplace by government and companies and to follow systematic guidelines (Hutchinson and Waters, 1987; Dudley-Evans and St John, 1998) which encompass designing programs, identifying training needs and learning objectives, tailoring training materials, delivering programs using effective methodology and evaluating the programs for further improvement. Moreover, teacher training programs should be set up to prepare teacher for professional development in workplace *EOP* training to cope with the challenges as teachers play important roles in providing workplace *EOP* training programs as one of the sources of knowledge and resources (Ellis and Johnson, 2002). Further a quality assurance system for workplace *EOP* training

program should be developed to monitor the standard and quality of program provision, in light of the different requirements of various business sectors.

### 6.3. Chapter summary

This chapter has presented the major findings of stage one in-depth qualitative interviews. Qualitative interviews with policymakers, business employers, training providers and working adults in Hong Kong and mainland China have revealed challenges in developing and implementing workplace *EOP* training in the Chinese context. The solutions to cope with the challenges in the training practices have included systematically following standard program development process, tailoring training content, conducting program evaluation and aligning program with a qualification framework. The first stage findings well inform the evaluative case studies in stage two.

## CHAPTER 7

### FINDINGS IN CASE STUDY 1 OF *EOP* TRAINING IN A MAINLAND CHINA MACHINERY PRODUCTION AND TRADING COMPANY L

From Chapter 7 onto Chapter 8 and 9, as the second stage of the study, Case studies 1, 2, 3 are investigated regarding their training effectiveness in preparing employees for global business communication and the factors which contribute to or hinder the training effectiveness are identified through a range of research instruments i.e. qualitative interviews, participant observation, surveys and documentary study. The findings are presented in the Chapter 7, 8, 9 and their implications discussed in Chapter 10. The stage one findings are used as a benchmark in the case study evaluation process.

#### 7.1. Introduction to case study 1 - Company L

One practical workplace *EOP* training program in Wuxi, mainland China is provided as case study 1. Private international machinery trading company in China needed workplace *EOP* training for a period of three months.

The training participants were general manager, mechanical designers and engineers, customer service and accountant, who formed a multi-functional team. General manager, customer service and accountant had greater demands



in improving telephoning and presentation skills. Mechanical engineers needed to improve English writing, reading and listening skills, for occupational purposes. All of the participants involved receiving overseas clients, which required good oral communication skills.

### *Influencing factors in program design*

#### 7.2. Training needs analysis

Training needs analysis is crucial in deciding the training content in mainly written and oral communication skills development and course objective. Specific training needs and requirements are gathered usually before the course commences, which is good for the ongoing curriculum development. The course should address these needs to be effective. In this case study, before the training started, an interview was conducted with the general manager to discuss the course objective, course content and materials. The general manager wanted the learning content to be tailor-made and the training mode to be a mixture of formal and informal methods.

In describing Company L's training needs and requirements, company owner and employees listed the most important skills for effective written and oral business communication in the case study interviews.

For written communication, Stephen, Company Owner of Company L stressed: *"Email is the most important. Others like some brochure or catalogue are both needed"*. This statement was confirmed by Helena, Accountant of company L and Laura, Customer Service of company L, who emphasized the importance of email as written communication channel, particularly when communicating with customers. For written communication, Helena indicated the use of templates, such as for orders, product import and export. The following purchasing order is a sample of the template.

<b>Please confirm by Fax or E-mail</b>		<b>P/O NO.:</b>	
<b>Order to:</b>	<b>Page:1/1</b>	<b>Date:</b>	
	Dealt with by:		
Attn :	Telephone:		
Contact:	Fax:		
<b>Deliver to:</b>	<b>Invoice to:</b>		
<b>Validity period:</b>	<b>Please confirm order to:</b>		
<b>Terms of delivery:</b>	<b>Terms of payment:</b>		
<b>Description</b>	<b>unit price</b>	<b>quantity</b>	<b>Extended Price</b>
<b>Total:</b>			<b>\$0.00</b>
<b>The Sellers:</b>	<b>The Buyers:</b>		
<b>Authorized Signature:</b>	<b>Authorized Signature:</b>		

For oral communication, Stephen emphasized receiving incoming customers, participating in overseas training in Hong Kong and U.S., which required “*oral communication ability*” and “*receiving customers through participating in training or some exposition*”. Meanwhile, engineers also “*need English skills if participating in technical training*”. In this case, written and spoken English was commonly used in various business communication activities by the training participants, who were key players in the company.

### 7.3. Course objective

After the training needs analysis talk with Stephen, the general manager, the course objective was decided as the development of *EOP* competence with an emphasis on its application to daily business. The training level was at upper-intermediate. A practical aim of this session was to prepare the engineers for machinery training in the U.S. The trainer then planned the course and selected the course content and materials.

### 7.4. Course content and materials

Course content and materials for this case are first described, consisting of course book materials, supplementary spoken and written English exercises and handouts, followed by critical comments from the case study participants and

the trainer. These learning materials are compared with authentic business documents, the discrepancy of which is discussed.

The course integrated learning materials from *Industry Matters* (Michler and Welt, 2009) and *Passages – Cambridge International English Course 4* (Richards and Sandy, 2003) with the application of *EOP* skills in the participants' daily workplace situation. *Industry Matters* has 10 teaching units, covering the topics of company visit, travel arrangement, making telephone calls, meeting, presentation, marketing campaign, production, contracts and dealing with problems. Stephen felt that the textbooks *Industry Matters* and *Cambridge New Interchange 4* were adequate for the program:

*Actually every textbook is quite useful. The content is not necessarily relevant, but the sentence structure or vocabulary can be used sooner or later. (Stephen)*

The course materials were supplemented with tailor-made spoken and written English exercises. Stephen also requested adding specific professional vocabulary “*encountered in product promotion materials and customer emails*” to the program materials. The supplementary spoken and written practice materials proved to be effective in improving the employees' practical oral and

written communication skills. Bill, a mechanical engineer, thought that the email and note-writing tasks for each session were especially helpful.

However, in comparing the Writing Exercise Sample and the employees' simple email technical communication document, there was still inconsistency as the writing exercise was not specific enough for employees to directly transfer the writing skills to their daily jobs. The Writing Exercise Sample is a part of the Cambridge BEC Preliminary test papers, which is general to some extent. The discrepancy lies in the professional vocabulary, genre, syntax structure and the business context itself.

### Writing Exercise Sample

#### Writing Task 6

You work for an international company in Los Angeles. Your company wants you to order a patch of industrial motors. You are just to confirm the order details by writing an email to your supplier, Carole Buckley of ABC Motor Co., Ltd. in Huston.

Write an email to Carole Buckley:

- stating the number of motors your company wants
- stating your expected delivery date
- stating your preferred payment methods
- asking for unit price and possible discounts

*Write about 40 words*

*TO: Carole Buckley*

*Subject: Motor ordering*

*Dear Carole,*

I am writing to confirm our order details of Aug 23<sup>rd</sup>.

We finally decide to order from you 20 units of model 1203 with preferred payment by letter of credit. We will expect you to deliver the goods by Sep 20<sup>th</sup> by ship to Los Angeles. Would you confirm with us the number we order and the unit prices as well as the possible discounts we could have?

I look forward to hearing from you soon.

Yours sincerely,  
Brian Davison  
Marketing Manager

## Employee's Technical Communication Document Samples

### Sample 1 from Helena

Dear XX,  
We've received your confirmed order, but now we need to add XX to the order.  
Attached is the revised order. Please check it.  
Please kindly send the XX together with our other goods.  
If the goods have not been shipped yet. Please deliver it ASAP and tell us the date and tracking number.  
Looking forward to hearing from you!  
Best regards

### Sample 2 from Bill

Hi XX:  
Could you please help to provide your XXXX (Material Safety Data Sheet), it is required by your using instruction, which lists reading requirements before using it and our safety department needs it to backup too, thank you!

As one of the course material writers, the researcher also indicated the lack of effort in designing course materials based on constructed workplace discourse, even though the training participants thought the course content and materials were adequate.

### 7.5. Class size

This case study program was conducted within four group members. The trainer felt quite comfortable with the group setting and had adequate chance to enable inner group communication to enhance communicative competence development. For this issue of class size, it seemed that even one-on-one format was more efficient than the small group. However, the trainer thought that this reduced the chance for communication among learners.

In the post-course interviews, Stephen considered “*one teacher, three to four students*” to be a more efficient class size than “*one teacher to more than 10, 20 or 30 students, within 45 minutes*”. However, Stephen thought that one-on-one teaching was the most efficient. Helena, the company accountant, agreed and preferred the small group tutorials that focused the instructor’s energy. Laura, the company customer service representative, favored a “*one-on-one full English tutorial*”, rather than the small group format.

### 7.6. Class time

This corporate program ran from February 2010 to May 2010 for a total of 18 hours. The class was held every Saturday morning for six continual weeks. The



training participants sometimes had to work on Saturdays. They were satisfied about holding the class in the daytime as most of them were able to concentrate.

### *Influencing factors in program implementation*

#### 7.7. Conception of teacher's role

The trainer reflected that she played different roles in assisting the company's international business development, from instructor to business communication consultant. Stephen agreed that workplace English trainers can play multiple roles in the company, such as director, organizer and translator, in addition to being program instructor.

#### 7.8. Views and understanding of teaching and learning: delivery and methods

The small-group training format enabled one-on-one communication and interactive activities, such as role play and simulated talk. All of the training sessions were conducted in small groups of four people. The training mode was highly interactive. The pedagogical approaches were task-based, text-based, collaborative, skills-centered and learning team-based. Based on the learning materials, the trainer designed a range of oral communication, writing and quick

reading tasks to enhance the learners' occupational communication competence. Role play and simulation were used to practice conversations and meeting with and telephoning customers, suppliers and colleagues. The training and learning of English occupational communicative competence were also based on authentic situation or communication problems from the learners' work scenarios. Instructional audio and video were used to showcase the best practice business presentation, telephone conversation, meeting and socializing.

The trainer reflected that she also created a learning environment before and after the training sessions by introducing creative self-learning methods to integrate *EOP* learning with the daily work, such as by showing the students English language learning multimedia resources and machinery manuals to enhance their understanding of the language used in occupational contexts. The learners were encouraged to use their spare time to digest the learning content and apply it within their work settings.

In one scenario of the session, the training topic was more closely related to the business and industry. One of the training topics was on *Job*. The training started with text-based reading of job content for a model company with the corresponding functions of sales, customer service, production, engineering etc. This was followed with an application of the text to the real work context. Each of the training participants simulated reporting their daily work to the general

manager. The trainer also encouraged collaborative learning by initiating conversation on job between two partners. Meanwhile, the training session also included American English audio to facilitate listening skills and guided conversation about the possible situation in industrial training in the U.S. The small group enabled the trainer to conduct one-on-one tutorials to tailor the learning content to individual needs.

Another method for improving workplace English competence, according to Stephen, included participating in English technological training, in which employees can sit and listen to the English speaking. They can also have some oral English exchanges with teachers.

On the other hand, Laura suggested small-group activities and role play which would be more interesting. Helena suggested tailor-made training methods, for the following reasons:

*Everyone will have different English foundation and different requirements.*

*They can get used to different methods. Probably someone is more suited to guidance method while others are more suited to learning in a compulsory environment. (Helena)*

### 7.9. Students' workplace English learning styles, learning strategies, motivation and personality

The written survey (see **Appendix 7**) has provided training participants' profile information (see **Table A 6**), analysis of second language learning survey (see **Table A 7**) and second language learning style (see **Table A 8**).

In company L, Bill holds a polytechnic degree in engineering while Laura, Jeremy and Helena hold a college or bachelor level degree in customer service, machinery and finance respectively. Their working experiences range from 5 to more than 10 years. Their motivation of learning workplace English is for improving job quality, productivity or personal improvement. All of the training participants experienced neither salary increases nor job changes.

In company L, Bill has lower level of memory and cognitive strategy use while Laura, Jeremy and Helena have medium level of strategy use. Laura has upper medium level of compensation strategy usage while Helena has upper medium level of meta-cognitive strategy usage. Helena has high frequency of affective strategy use while Bill and Laura have high frequency of social strategy usage. Helena has higher frequency of second language learning strategy use. In the written survey of learning strategy, Bill wrote *reading, writing and using in the*

work. Laura wrote *taking part in training class*. Helena wrote *checking vocabulary and applying to the job*. These correlated with the SILL survey results.

Bill use visual and hands-on senses to work. Laura use auditory means while Jeremy used hands-on senses. Helena use all three senses. In dealing with other people, Bill and Laura are extroverted. Jeremy is introverted while Helena is both extroverted and introverted. In handling possibilities, Bill and Laura are intuitive. Jeremy is concrete-sequential while Helena is both intuitive and concrete-sequential. All four employees are closure-oriented in approaching tasks. In dealing with ideas, Bill and Helena are global and analytical. In written surveys of learning style, Bill and Laura wrote *learning with others or in a team* while Jeremy and Helena wrote *learning through reading*. The written survey results are in line with the SAS survey.

**Table A 6 Training participant profiles for case study 1**

Name	Bill	Laura	Jeremy	Helena
Company	Private China-based Model Making Company L in Machinery	Private China-based Model Making Company L in Machinery	Private China-based Model Making Company L in Machinery	Private China-based Model Making Company L in Machinery
Department	Engineering	Customer Service	Engineering	Finance
Position	Department Manager	Customer Service	After-sales Engineer	Finance
Education qualification	City Polytechnic	College	College/Machinery	Bachelor
Work experience	4~6 years	4~6 years	14~16 years	7~10 years
Salary increase	n/a	n/a	n/a	n/a
Job change	n/a	n/a	n/a	n/a
Motivation of learning workplace English	Improve job quality and productivity	A kind of self improvement	Personal preference	Personal preference

**Table A 7 SILL survey results for case study 1**

Strategy	Bill	Laura	Jeremy	Helena
Remembering more effectively	Generally not used	Sometimes Used	Sometimes Used	Sometimes Used
Using all your mental processes	Generally not used	Sometimes Used	Sometimes Used	Usually Used
Compensating for missing knowledge	Sometimes Used	Usually Used	Sometimes Used	Sometimes Used
Organizing and evaluating your learning	Sometimes Used	Sometimes Used	Sometimes Used	Usually Used
Managing your emotions	Sometimes Used	Sometimes Used	Generally not Used	Usually Used
Learning with others	Usually Used	Usually Used	Sometimes Used	Sometimes Used
Overall use of strategy	Sometimes Used	Sometimes Used	Sometimes Used	Usually Used

**Table A 8 SAS survey results for case study 1**

Style	Bill	Laura	Jeremy	Helena
Activity 1: How I use my physical senses to study or work	Visual and hands-on	Auditory	Hands-on	Visual, auditory, hands-on
Activity 2: How I deal with other people	Extroverted	Extroverted	Introverted	Extroverted, Introverted
Activity 3: How I handle possibilities	Intuitive	Intuitive	Concrete-sequential	Intuitive, concrete-sequential
Activity 4: How I approach tasks	Closure oriented	Closure oriented	Closure oriented	Closure oriented
Activity 5: How I deal with ideas	Global and analytical	Global	Global	Global and analytical

### *Influencing factors in vocational context*

#### 7.10. Human resources training and development policy

In this case study, Company L paid great attention to workplace English training and learning activities, recognized by the trainer and the employees. The company owner stipulated the human resources training and development scheme had several ways to motivate employees to continue learning English in the workplace. Stephen, as company owner, always encouraged employees to learn English by themselves. Employees can take any tests and if they passed, “*all the costs will be reimbursed*”, as a kind of favorable human resources training and developing policy on employees’ workplace English learning.

Under the big industrial trends, English has become an increasingly important skill t for improved work in case company L, which has affected the human resources training and development policy. Employees also recognized that to work well in this case company, English must be good.

Stephen explained even though there was no direct reward for “*passing test with certain levels*”, employees who improve their English can “*get a new position or new post*” or have “*more communication or chances to go abroad*”. Employees also would have “*more training opportunities*”.



Stephen also described some recruitment policies relevant to English skills. The company had “80 employees” at the time of the interview. But Stephen explained that in five years, with the improved technology and efficiency, the company would need only “50 people” and those “with better English can stay”. New positions would be filled by people with “better English”. In summary, Company L had a supportive and favorable human resources policy for encouraging employees to maintain their English proficiency and improve their performance in business communication activities.

#### 7.11. Climate and environment

The working language in the company is Mandarin Chinese. However, there is on-the-job communication in English. The company owner thought that using English on the job could provide a channel for the development of workplace English communicative competence:

*English use is the best teacher. I reckon they use English. Reading customer's Email is a kind of learning. Reading brochure is a kind of learning.* (Stephen)

Alternative learning support can be derived from the workplace environment or from daily life. Such support can be provided by both the trainer and the workplace environment. Jeremy, a mechanical engineer, preferred immersion in an environment in which only English was used. The trainer also agreed that the training participants had to overcome the barrier of a poor language environment by putting more effort into using English on the job.

#### 7.12. Resources and support

The company owner and the training participants had different views on the benefits of alternative learning support from online learning platforms, which can cater to their special work requirements. The technical support engineers tended to prefer online learning, due to tight schedules of frequent business trips. A helpful English learning environment was considered more useful than a short-term training program for improving the employees' workplace English communication skills.

For instance, as Bill often had business trips, he enrolled in the EF web-based course, which offered daily “*one-on-one oral communication with a teacher*”. Bill thought that his job “*needs flexible and autonomous learning*”. Helena believed that “*true improvement is in daily living*”, as she sometimes listens to

some news or watches some movies, or reads some English novels, which is better.

*Workplace English training effectiveness*

*Short-term training program effectiveness*

#### 7.13. Intended learning outcomes

After undertaking this training program, the two engineers accompanied the company owner to the U.S. to participate in machinery training. They successfully passed the training and obtained their certificates, as evidenced in their company news, suggesting that the workplace *EOP* training successfully helped the company to realize its training goals. Stephen thought that there was “*real improvement*” after the training. The trainer was also satisfied by their progress.

The training participants obtained concrete help in workplace English communication skills development, such as oral communication and business e-mail writing. They also acquired useful industrial knowledge:

*Last training is organized mainly because my colleagues have to go abroad.*

*It helps them to brush up their English. In this way, their vocabulary increases. Besides English, there will also be some essential industrial*

*knowledge. When they communicate with others, they can have the topic.*

(Laura)

Moreover, the employer Stephen also found immediate training effectiveness which however has not been long enough to be transferred to English use on the job. Stephen thought there was “*real improvement*” after the training.

Company owner Stephen explained at the time of the interview, though engineers did not have to write much in their job, their Email and memo writing could be a problem. Even for employees with CET-4 certificate, spoken English can be problematic. The company owner observed that the major problems in engineers’ professional English communication were not in professional vocabulary or industrial knowledge but in general daily conversation:

*Engineers in our industries understand very well the professional vocabulary needed in this industry. They are very professional. To engineers, they are very sensitive. If teacher talk about professional things, we feel it is easier for us to understand and comprehend quickly. But if we eat or chat together, that’s screwed up.* (Stephen)

Professional English specialists were recruited to bridge the international communication barriers. But lack of engineering background also created a dilemma to company L's workforce development. Stephen found it harder to train engineers to speak English than to train English language professionals to be an engineer, even though it was also difficult to teach professional knowledge.

#### 7.14. Learner self-assessment results

One year after completing the program, the training participants Bill, Laura, Jeremy and Helena were asked to self-assess their overall workplace English communicative competence, writing and oral communication on a 1 - 4 rating scale, representing the proficiency levels from beginner, lower intermediate, upper intermediate to advanced (see **Appendix 7**). The self-assessment results were analyzed using SPSS 21 and are shown in **Table A 9**.

**Table A 9 Self-assessment results for case study 1**

	N	Minimum	Maximum	Mean	Std. Deviation
Language aptitude self-assessment	4	2	2	2.00	.000
Writing	4	1	2	1.75	.500
Oral	4	1	2	1.50	.577
Valid N (listwise)	4				

From the table, we can see that the average score for the overall language competence is 2, which is lower intermediate. Writing and oral scores reflect a

perception of particularly low competence. Laura scored 1 in writing and oral communication. Jeremy also scored 1 in oral communication. Although we acknowledge the limitations of self-assessment, these low ratings suggest that the participants themselves do not feel that they have sustained a high level of English competence over time.

#### 7.15. Unintended learning outcomes

There were diverse benefits to the company garnered from this corporate program. The participants improved their workplace English communicative competence, career prospects, confidence, interest and motivation. The company owner, Stephen, observed that through workplace *EOP* training, the employees not only acquired professional improvement and salary increase, but also enhanced their confidence in using English on the job. Both Stephen and Laura noticed a positive change in the participants' attitude and interest in learning workplace English.

Stephen further explained if employees could have “*bigger progress, this is a big lift to employees' confidence*”, which was “*more important than salary increase or job promotion*”. It was important for employees to get interested and feel motivated as the course is very useful to them. Laura also agreed that

interest and persistence could be generated after a period of English training as well as the desire to improve the English skill.

The participants appreciated the career enhancement that the training offered them. Helena explained that if her English improved, she would have more “*communication opportunities with overseas customers*” and “*meeting with people from different countries*”. Increasing her vocabulary also made it easier for her to watch English movies, so she appreciated the improvements to both her professional and personal life. Bill agreed that the English training improved his “*personal quality*”.

#### 7.16. Difficulties in workplace English use

Both the company owner and training participants found their major problems of workplace English communication in English listening, speaking and writing. For example, Stephen observed that it remained difficult for employees to understand well English medium mechanical training as most of them can understand “*60 – 70% of the content*”. Spoken English was not good either. English listening and speaking could be problematic for these Chinese learners.

In listening to English training, one engineer in particular reported that he could not fully comprehend the content. The accountant reiterated the difficulties in comprehending long meetings filled with highly technical content.

Jeremy, the engineer explained his English level was at CET-4 and he comprehended “70-80% of the training content”. Sometimes only “50-60%” and the “remaining 10-20% relies on guessing”. He could not get used to long talk. If the training involved operating a machine, there wouldn’t be a problem. Helena added that she could not understand technical communication, long discussion meetings or “100% English training” with “*professional content and terms*”, for which she lacked adequate reading on the job.

In oral English communication in particular, the technical support engineer found difficulties due to insufficient vocabulary, incorrect pronunciation and lack of English thinking, which have brought problems to their technical training and communication. Bill indicated that his problems lied in “*lack of vocabulary, fear in pronunciation and the Chinese thinking*”, which created barriers in his communication.

In business email writing, the customer service representative had trouble in constructing sentences and using correct words in communicating with some



domestic customers in China. Laura, customer service representative of Company L mentioned her major problems such as “*low English foundation and small vocabulary*”. She often used “*fragmented sentences and had problems in spelling*”. However as she mainly interacted with Chinese customers, there was still mutual understanding in communication.

#### *Long-term program impact on job performance and business operation*

##### 7.17. Long-term learning outcomes

The company owner, Stephen, thought that the employees’ workplace communication was becoming easier after three months’ training. Compared to a low foundation in the language, they showed a “*remarkable improvement in spoken English*” after the training, but these gains began to digress over time “*through not using English*”.

The trainer felt that the long-term learning outcomes depend on the business environment, on whether English becomes a daily working language and on whether employees are aware of the importance of continuous improvement. From the long-term perspective, consistent workplace English use was required to achieve continuing progress and good long-term learning outcomes.

#### 7.18. Sustainability of learner autonomy

The sustainability of learner autonomy hinges on individual learner's motivation, commitment, persistence and perseverance. Most of the training participants were aware of the effect of interest on learning outcomes. A group of training participants continued in various forms workplace English training and learning activities.

In the case study, the company owner did not observe adequate commitment to workplace English learning from his employees. He felt that they lacked strong interest and motivation. Nevertheless, some training participants became active English learners by participating in alternative training and learning activities.

Stephen observed that his engineer's English was better between 2007 - 2010. He used to require his employees to persist in English learning. There was only a *“small group which is very special, who is hard-working, self-disciplined and is still doing self-study”*. Helena expressed her willingness to continue improving her English in vocabulary and through reading and listening more, in spite of her busy work.

The training participants were also aware of the importance of persistence in workplace English learning, perseverance, instrumental motivation, interest and the benefits of learning with their colleagues. All of these measures contributed to continuous workplace English communication skills development. Helena thought that she should combine her interest and motivation. Bill explained that, by communicating with others at the same (English proficiency) level, his “*perseverance*” can be “*stimulated*”. For him, it was about “*whether [he would go] on learning English after the course ends*”. If there was “*progress, which generated economic or material improvement, I am definitely motivated to continue learning English*”.

However, Laura was not motivated to persist in learning workplace English, due to inadequate use of English on the job within the Chinese market. She arranged to learn English periodically. As her workplace communication was approximately “*95% in Chinese*”, she could not use English in her job and thus “*her motivation is not strong and sufficient enough*”. Laura’s case implies that if English is used often on the job, the learner will be more motivated to continue learning English after the course ends.

#### 7.19. International business communication performance

Workplace English training program's contributions to international business communication performance cannot be quantified. They have been measured through employees' on-the-job performance review, volume of sales order, and results of business expansion.

Stephen explained that the international business communication performance cannot be quantified, as the company has also recruited some English major students to operate. But there was some "*general qualitative description*". These included better comprehension of machinery training by his engineers, going to U.S. without translation, communication with customers and document translation. All of these were related to performance outcomes.

Moreover, Helena explained the international business communication performance could be seen from the "*volume of order*". Without English ability, "*international business orders*" would not be obtained. As customers communicated in English, if company's English ability improved, customer's requirements could be better understood and there could be better communication with customers, leading to "*more orders*".

In addition, Bill thought that better international business communication performance could help the business expand. Laura felt that with good English, she could face directly the “*overseas markets*”, which yield higher profits, rather than the Chinese customers only. Good English would also allow her to serve the company by communicating with overseas customers, improving the “*company’s sales volume*”.

#### 7.20. Skills development for employability and employment

The trainer thought that workplace English communicative competence training was, essentially, a skills development process, through which the training participants enhanced their employability.

One technical support engineer explained that improving his workplace English competence, specifically his English presentation skills, may facilitate his international career development. Jeremy described two probable jobs that would have required him to travel around Asia and America. The “*basic introduction and question and answer*” portions of the interview process went well, but he had trouble with “*long presentations*”. He thought that if he could speak English, he would be able to “*travel around Asia*”.

As Helena explained, employees working in “*Chinese or foreign companies*” must communicate with “*overseas clients, international experts and foreign counterparts*”. Communication in English was “*convenient*” and helped with companies’ “*technical ability improvement or business growth*”. It could also help an individual employee to “*improve his ability*”.

#### 7.21. Sustainable livelihoods

Workplace *EOP* training programs can equip employees with very important employment skills especially needed in the eastern part of China. This can also facilitate international trade and exchange.

For example, Stephen explained in the regions of “*Jiangsu, Zhejiang and Shanghai*”, the English communication skill as a “*vocational skill is very important*”. Bill added that if English could be spoken, one would not be “*confined to the city or province, which facilitates international trade or foreign exchange*”.

The trainer agreed and suggested that more workplace English skills development program could promote business growth, reduce poverty and facilitate regional socioeconomic development, which was very meaningful.

## 7.22. Conclusion: answers to research questions for case study 1

*How effective are EOP training programs in preparing employees for global business communication in the workplace?*

It can be concluded that case study 1 was effective in its short-term goals as the program helped technical support engineers to successfully obtain certificates in machinery training in the U.S. In addition, there was “immediate effectiveness” after the three-month training program. Self-assessment results showed the training participants had a lower-intermediate level of language aptitude more than one year after the program completion. Moreover, the training participants increased their confidence and interest in developing business communicative competence. However, the training participants still experience difficulties with listening and oral communication, particularly in relation to technical communication contexts, i.e. listening to English machinery lecturing and making technical presentations. Nevertheless, these training participants sustained their *EOP* learning activities in various forms thanks to their interest and confidence in acquiring and applying *EOP* on the job and their desire to maintain an upward career momentum in the company. One engineer has been promoted to the managerial position, which is a positive sign of career advancement. From the organizational perspective, this *EOP* training program

has helped the business expand in other areas through smooth English business operation and increased order volumes, although assistance has also been sought from some English language professionals.

*What factors contribute to and hinder the effectiveness of EOP training programs in the workplace?*

The small four-person group facilitated the effectiveness of *EOP* training although not in one-on-one tutorial in its ideal form, through which trainer can provide instant feedback to any questions raised by the training participants. Course content and materials were considered “adequate” in meeting the training target, negotiated during training needs analysis with company owner Stephen, even though they were not exactly the same as the real business communication documents. They also provided written and oral communication templates for training participants to transfer from classroom to workplace. As most of the training sessions were conducted in the day time on Saturdays, class time was considered good for the *EOP* training program to be effective. The training process was interactive, which enabled instant problem solving in international business communication, although not all the workplace communication problems were solved in the classroom.



However, there were no post-course assessment requirements for trainer to quantitatively measure the progress throughout the training program on the training participants as they were too busy at their work.

Nevertheless, the workplace provided substantial on-the-job communicative competence development opportunities and climate for most of the training participants to maintain their interest and confidence in practicing workplace *EOP*. The company policy also comprehensively supported *EOP* training and learning activities.

In this case study 1 in Company L, the workplace *EOP* training program was effective in helping engineers successfully obtain training certificates from the U.S. and gain more competence in international business communication activities. This corporate program had good class time and class size arrangement which contributed to training program effectiveness. This program also followed a systematic delivery process based on ready-made textbooks and pre-designed handouts. This corporate program has been supported with favorable human resources training and development policies. It can be more effective by adding a standard assessment and following benchmarks such as common European framework in program development and implementation.

## CHAPTER 8

### FINDINGS IN CASE STUDY 2 OF *EOP* TRAINING IN A MAINLAND CHINA MACHINERY ACCESSORY PRODUCTION COMPANY Y

#### 8.1. Introduction to case study 2 - Company Y

International Heavy Machinery Manufacturing Base in Wuxi, mainland China has been operating as a local producer of mechanical accessories and equipment for five years. In 2008, the manufacturing base was acquired by an overseas-based multinational. It has been undergoing merger and acquisition process since then. An expatriate management team has been on site in the production unit to inspect the integration process, including a range of communication activities, such as negotiation, business transactions by face-to-face talk, telephoning, meeting and presentation, the language and content of which have been highly technical and business relevant.

The purposes of the communication events were to ensure the successful strategic transition of the newly established subsidiary of a multinational company committed to global level of product, management model, quality standard and employee value. Nevertheless, most of the employees, including some of the department heads, were locally recruited and did not possess

adequate language and communication skills and knowledge to deal with the communication requirements with overseas expatriates, despite the fact that the corporate website, product brochure and technical design documents usually list the main technological terms and processes in both English and Chinese.

In this context, the newly merged Company Y strategically needed business English communication training for three months, with two training sessions per week in the specific areas where employees were finding difficulty. They covered liaising with foreign business partners, particularly writing email and telephoning. Comprehending foreign clients' oral English was also problematic. The role of the trainers was to solve Company Y's business English communication problems step-by-step and enhance their communicative competence of all the department heads and relevant employees.

### *Influencing factors in program design*

#### 8.2. Training needs analysis

In this case, training needs analysis was conducted to provide comprehensive information for workplace *EOP* trainers to design the course to address training needs, requirements and difficulties. Before the training began, the trainer and

her training centre manager conducted interviews with Company Y's HR manager and general manager, both of whom acknowledged the strategic importance of workplace business English communicative competence and expected the trainers to solve the business English communication problem. The HR manager expected an intermediate level of training (according to the Cambridge Business English Certificate system) while general manager stressed the importance of oral communication. The trainer suggested an objective assessment in listening, writing, reading and speaking in the context of business communication scenarios and an overall qualitative needs assessment through needs analysis questionnaires filled out by participating employees from almost all of Company Y's service departments (Technical, Sales, Finance, Management, Quality Control, Production, Logistics, Supply Chain, Environment, Health and Safety, Reception and Operation) excluding the frontline workers and operators, who normally would not communicate with expatriates. Interviews were also held with employees and department heads based on the interview task sheet.

In the written needs analysis survey with Company Y, in answering the question "Which of the areas above do you most need to improve in your English? (Reading, Writing, Speaking, Listening, Grammar, Vocabulary)", 15 of the trainees rated speaking as the top learning need, six rated reading as the

priority learning need, three rated listening as the top concern, one rated writing and one rated technical vocabulary. The course was thus designed to cover all five items, with speaking as the priority.

In describing the major difficulties in business English communication, most of the answers were associated with the job tasks in different departments. They included communicating with customers, writing reports, replying emails, designing mechanical drawings, recruiting new staff, staff management, cash and banking, receiving customers, communicating with visitors who had strange pronunciation, overseas contact and logistics. The training and learning of business English communication was highly dependent on and bound to occupational area, industrial context and corporate environment. The workplace *EOP* training course was expected to address these difficulties.

In answering the nine interview questions by department heads based on the interview task sheet (Ellis and Johnson, 2002), among 11 interviewees, five rated telephone as the most frequent means of communication, three chose face-to-face communication as the most frequent communication channel, three chose meeting, two chose letter and fax and one chose email. Oral communication, telephoning, meeting and writing by email, letter and fax were obviously highly needed workplace skills. Moreover, in the communication

process, nine mentioned *difficult to understand* or *difficult to listen* as the most difficult task. Two identified the areas for improvement in *oral ability*, *pronunciation* and *listening*. Most of the interviewed respondents had to communicate with expatriates such as colleagues and clients from Singapore, Korea, Sweden, U.S. Some possessed the awareness to make preparation before establishing overseas contact while others recommended the training in business English communication to be oral interaction focused. In terms of training approaches, all department managers claimed heavy workloads, and thus the training approaches were selected to be relaxing and enjoyable. General manager strategically defined the need of workplace language training as a necessary step towards organizational internationalization, which proves to bring benefits for business growth.

In the post-course qualitative interviews, conducted one year after the course ended, Stephanie, Company Y's HR manager reiterated the important roles of training needs analysis in the process of tailoring the program to business specific requirements. Stephanie explained training needs analysis began with "*good communication with the course instructor*". In this way, the training participants and trainer got to know the areas for further improvement. The training can be "*more targeted*" with a "*very clear goal*". In the training process,

*“industry specific books”* had to be selected, *“depending on the job needs and the actual situation”*. There could be *“better course arrangement”*.

For oral business English communication, Stephanie explained that English was used in the company communication when people from headquarters, superiors, or expatriate customers visited. In the *“daily internal communication or communication with outside parties with foreigners”*, English was needed. More oral workplace English was used in the quotation meeting, which also was a challenge to employees’ English listening skills.

For specific training participants, Luke as logistic officer in Company Y needed both oral and written business English communicative competence for his job. Luke used *“telephones, emails and some forms (with samples)”* in his job. There was some *“logistics relevant information”*. Luke mentioned *“emails with either Chinese or foreigners are in English”*.

For Gary, engineer of company Y, written and oral business English communication needs were derived from the job. Gary explained that communication on the job was through either written email or oral communication. The process of receiving foreign customer was started with email, which had *“higher requirements on reading and writing”*. The foreigner

visited the plants if “*interested in the company’s products*” and Gary had to use basic simple English (not fluent) to bring the foreigner to the plant and communicate with him.

On the other hand, Jim, accountant of Company Y, focused his workplace English communication on written form. Jim argued that the “*balance sheet, financial data analysis or emails*” were in English. The “*working language is still English and communication with Chinese is in English but in written form*”. In the “*oral communication, unless facing foreigners, Chinese is used*”. In light of this limited workplace English use, Jim felt more passive than active learning of English, even though there would be effective improvement. In particular, in written business English communication, Jim indicated the importance of fixed forms and templates for business documents, with procedures for employees to follow and handle. It can be seen that both oral and written communication was predominant in the business communication activities at Company Y. However, the business communication needs and requirements still differed among various departments.



### 8.3. Course objective

The course objective was to enhance office employees' writing and oral communication abilities. The specific communicative competence development tasks involved writing emails, fax, memo and reports, speaking in receiving guests, business meeting, discussion, presentation and conferences. The course level was business English preliminary. It aimed to not only improve the training participants' business English competence but also their job performance and business operation. The course objective was closely related to real business needs.

### 8.4. Course content and materials

The course content and materials in this case are first described, the use of which is demonstrated in one text-based teaching transcript excerpt. These learning materials are then assessed through interviews with the case study participants, trainer's reflection and then compared with authentic business documents collected from the participants for further improvement.

The course instructor used the business English textbook *Further Ahead Cambridge Business English Preliminary* (Jones-Macziola and White, 2003) as

the main teaching material, supplemented by business writing exercises based on guidelines and templates, and the technical jargons in the welding and accessory industry, such as welding automation, welding consumables, cutting system, manual welding and cutting equipment, collected from business brochures and websites.

*Further Ahead Cambridge Business English Preliminary* has 20 units on the basic content in business operation. The course instructor tailored the course materials by considering Company Y's requirements in business English speaking, reading, writing, listening and technical jargons. Business email and fax templates were built into the course materials. The course instructor also used many company working scenarios into the discussion of the teaching materials, which are illustrated in the following course transcript excerpt.

T: It means your business lunch with your customer?
S: 3 hours
T: Do you discuss business in the meal? And if so, when? You can discuss first. How about Gary?
S: Answer this question? We will arrange business lunch with customers at 11 to 12 o'clock. About 1 hour. We will discuss business with our customer, but we will arrange business after the lunch.
T: How about you?
S: Yes. I agree with you. But sometimes, if we communicate with our customers well, we will discuss business in the meal.

Company Y's technical engineers had to handle technical English discussion with the customers, as illustrated in the samples from Gary. These are different from the course materials. They used casual tones and acronyms in the emails,

and were highly technical in using the professional terminology. There were also occasional grammatical errors in tense and syntax structures.

#### Sample 1: Email chains on discussion of technical requirements

Hi,  
The Slewing ring is enough for the torque. I have calculated, don't worry.  
Best Regards  
Customer Support Engineer

Hi,  
The work piece is length \*\*\*\*. Please check if your 2ton HS can withstand the CG of this work piece. If not you might need to increase the torque.  
Regards,  
Sales Engineer

Hi,  
Please note the requirement that offset of work pieces is \*\*\*mm not \*\*\*mm. And you will see the reason. According the required information the UGL should be HS10FB not RT20. I had discussed with XXX this yesterday.  
Best Regards

Hi,  
From the cost of the HS, I see that for the lifting device and rotation assembly the price is almost double. The part of these 2 assemblies is identical. Why the price difference is so great? Please advise. Also for this UGL, please update the price for RT20.  
Regards,  
Sales Engineer

Hi,  
Kindly find the Quotation-20120627rev1 about Chassis from North Africa-Mediterranean area enclosed below.  
But please note the total weight should be Chassis adding the platform. So the total weight should be 10T. The head stock and Tail stock model should be HS10HA-DB-D2200 and TS10HA-DB-D2200.  
Best Regards

Hi,  
1) The height of the roller is not provided, since it is budget, we take it as 1 meter from ground  
2) The height of the chassis is 1 meter without the wheel, with the wheel installed is 1.5 meter.  
Regards  
Sales Engineer

Hi,

I'm drawing about this project, but I need two dimensions:

1. What is the height of customer existing roller? It's better to provide drawings by customer.
2. What is the height of chassis? It's better to provide drawings by customer. The two questions above are important information for designing and quotation.

Best Regards,

Customer Support Engineer

Dear,

After careful study and consideration on the proposal, we found that the headstock is too long and too heavy on customer request as per the power-point. We have come up with a proposal for a new concept for customer consideration. Please forgive the hand-sketch drawing.

The order of movement would be:

- 1) the chassis will come in from the existing roller bed, the headstock will be moved to the side another roller bed in tandem with this headstock will be in place of the space in between the platform and roller bed.
  - 2) the chassis comes in place on the roller platform with raising platform in place.
  - 3) the TS will move in and the HS will move in from the front and side to clamp the chassis
  - 4) the work will be done on the chassis
  - 5) the roller platform will lower
  - 6) the HSTS will rotate the chassis and the platform will raise and hold the chassis
  - 7) the platform will move the side to customer existing track for the box to come in
- Please advise if this is acceptable by customer and also if there is any question from customer

Regards

Sales Engineer

The employees also had to handle the packing list and bill of lading for different products. But the HR manager Stephanie acknowledged the use of templates of Email, fax, letter and report in class to bridge the gap:

*You have provided us some materials on how to write emails, headings, body, including how to end. These should be helpful. (Stephanie)*

However, the trainer reflected that the working emails from training participant Gary should have been used more in class so that the course content matched the work scenarios. Future efforts have to be made to bridge the gap between course and job through prior collection of working samples, such as Sample 1.

#### 8.5. Class size

Case study 2 was conducted in a 30-people workshop. The trainer found it difficult to handle 30 training participants from different departments, with a mixture of experiences and English proficiency. Nevertheless, HR manager Stephanie considered cost saving as an important factor and did not agree to split the class into two smaller groups.

Stephanie argued that the class size issue was dependent on the company's "*economic condition, company's operation and individual condition*".

Stephanie indicated that although there were a group of people who preferred to have "*small class or invite a teacher to come or even one-on-one teaching*", Company Y would still stick with "*group training*".

For the issue of class size, Jim favored the one-on-one teaching mode or “*a group of 3-4 or 5-6 students*”. Jim thought the “*small class system*” would be more effective, as everyone would have opportunities to improve their English.

#### 8.6. Class time

This corporate program went from June 2010 to August 2010, with around two sessions per week in the evening. The total program length was 48 teaching hours. The trainer found it hard to concentrate on teaching in the evening and the participants also disliked the evening class time.

Jim reported that the training participants were “*not very willing to have classes in the evening*”. Gary explained, “*having classes in the evening after working eight hours in the day feel likes working overtime. It is a bit tiring*”. Shelly preferred to have classes in the working time as after work they were “*reluctant to talk*”. Shelly thought “*it won’t be very effective*”. Luke felt like allocating half a day in the weekend or afternoon. Luke thought that “*training should be a more important thing in the company*”. The clear response was that training would be more effective if arranged during working hours or on the weekend during daytime hours.

### *Influencing factors in program implementation*

#### 8.7. Conception of teacher's role

In this corporate program, the trainer reflected that she prepared for the materials before the program commenced and delivered the program. The trainer also provided resources to the training participants and answered the questions they raised relevant to their daily work. In this case, the trainer played multiple roles of instructor, material writer and international communication consultant.

#### 8.8. Views and understanding of teaching and learning: delivery and methods

According to the trainer's reflection, the program delivery process was quite comprehensive and covered the different stages of program implementation. Based on the needs analysis, the trainers designed workplace business English communication training sessions which incorporated communicative competence development scenarios and language use in the authentic job tasks in the workplace contexts, adopting the training delivery models combining *EOP* as well as workplace training and learning approach.

The training needs analysis, employee survey and interviews with department heads presented the specified needs of learning business English communication knowledge and skills with the authentic job and occupational tasks in their ongoing daily business environment. The training sessions were delivered with integrated task-based, adult learning-centered, needs-based, content-based and text-based modes, drawn from the topical scenarios in the training materials, which covered speaking, listening, writing, reading tasks based on the content areas “people”, “talking about companies”, “jobs”, “work and play”, “transportation”, “import and export”, “products and services”, “arrangements”, “marketing”, “statistics”, “money”, “socializing”, “business culture and ethics”, “meetings”, “production processes” and “conferences” (Jones-Macziola and White, 2003).

Meanwhile, the training of communicative competence was integrated into the task settings in a skills-based approach by simulating telephone conversations, email communication and mock-meetings in the topical areas. This eventually enhances employee business English communicative competence in the real job performance. In the training delivery process, a range of workplace training and learning approaches were adopted in simulating the business communication activities and shaping the appropriate employee behaviors in the context. In tailoring learning and training climate both before and after the training,



employee learning in business English communication knowledge, skill and competence was maximized. The trainer of the program also selected instructional media which presented the best practice telephoning, meeting, presentation and workplace communication skills so that the training participants could apply what they had learned in the actual work. Moreover, the training delivery integrated one-on-one model and peer tutoring, to tailor learning based on individual inquiries.

In one scenario of “socializing”, the business English communication training was delivered based on written text of *Budapest City Guide*, and the content of “planning a free day” during business trip. A range of business English reading, question and answer sessions were designed based on the task. The communicative competence of conversation during business lunch with clients was developed by listening to audio text on the experience of having business lunch in Spain and discussion over the business custom in China. Tips had been collected linking the real business practice with the issues of “what time is the business lunch”, “whether to discuss business in lunchtime”, and “how long the business lunch usually lasts”. The differences of food served in China and western restaurants were discussed based on the standard menu. It was considered practical and effective to incorporate authentic activities in the training of business English communicative competence, drawn from the

experiences of communicative competence training and corporate training methods. Thanks to the high practical relevance of training content, the training approaches were selected to apply the training content to real occupational activities so that the training could be more targeted in solving problems in business operation and directly assist organizational development.

Commenting on the training delivery, Stephanie suggested using “*actual company cases to help create impression and meanings*” in workplace EOP training programs, if it was not related to the company’s confidential materials. On the other hand, Jim suggested inviting a “*foreigner to the class*” so that there would be more “*practice opportunities*”. Jim did not think it would be effective to “*learn from a textbook*”.

More specifically, Gary recommended role play and suggested some detailed requirements to ensure its effectiveness. Gary explained, for people from different departments, there were some “*professional terms*” which were “*difficult*”. If the training program was organized with people from the same profession, it would make the discussion easier. And for role play, Gary suggested “*negotiation scenarios and technological discussion*”. In his profession, more “*mechanical terms*” would be used. Gary also suggested the group forum format to practice English speaking and talking with “*native*

*speaker from U.K., U.S.*”, in a “*relaxing environment*” rather than “*under pressure*” to be effective.

#### 8.9. Students’ workplace English learning styles, learning strategies, motivation and personality

In this case study 2, the written survey (see **Appendix 7**) has provided information on training participants’ profile (see **Table A 10**), analytical results of second language learning strategy (see **Table A 11**) and second language learning style (see **Table A 12**).

In this case, the working adults/participating employees all hold a bachelor level professional degree with working experiences ranging from 5 years to over 10 years. Gary, Shelly and Luke each received a 10% salary increase with no job change while Jim enjoyed a 20% rise in the salary and one job change. They are motivated to learn workplace English because it is relevant to job, increase productivity and reduce loss due to misunderstandings.

All of the participating employees have medium or upper medium range in the use of second language learning strategies. Gary is especially high in strategy use in the areas of memorization, using mental processes, organizing learning,

emotion management. In the written survey of learning strategy, Gary wrote *use English and improve on the job*. Shelly wrote *written communication and learning in the job scenarios*. Jim wrote, *communication, watching movies or English parties*. Luke wrote *linking with the real job and solving problems*. These responses are correlated with the SILL written survey results.

The analysis of work and study styles reveals that Shelly relies on auditory and visual styles. Gary and Shelly are both extroverted. Jim is introverted. Luke is both introverted and extroverted in their working styles. Gary, Jim and Luke are intuitive in handling possibilities while Shelly is relying on concrete-sequential oriented working style. All of the participants are closure oriented in approaching tasks. Gary is global oriented in dealing with ideas while Shelly, Jim and Luke are both global and analytical. In the written survey of learning style, both Gary and Shelly wrote *learning through communication*. Jim wrote *more exercises* while Luke wrote *dynamic learning*. They all preferred learning with others. These results are in line with the SAS survey results.

**Table A 10 Training participant profiles for case study 2**

Name	Gary	Shelly	Jim	Luke
Company	Sweden-based Global Company Y in Machinery Accessory Manufacturing	Sweden-based Global Company Y in Machinery Accessory Manufacturing	Sweden-based Global Company Y in Machinery Accessory Manufacturing	Sweden-based Global Company Y in Machinery Accessory Manufacturing
Department	Technical Support	IT	Finance	Supply Chain/Logistics
Position	Engineer	ERP	Finance Supervisor	Supply Chain/Logistics Officer
Education qualification	Bachelor	College in Computer	Bachelor in Accounting	Bachelor
Work experience	11~13 years	4~6 years	7~10 years	7~10 years
Salary increase	10%	10%	20%	10%
Job change	n/a	n/a	1	n/a
Motivation of workplace English learning	Related to work, very useful	For communicating with expatriates and document reading	Increase work efficiency and reduce loss due to misunderstanding	Use it and apply to work

**Table A 11 SILL survey results for case study 2**

Strategy	Gary	Shelly	Jim	Luke
Remembering more effectively	Usually Used	Generally not Used	Generally not Used	Sometimes Used
Using all your mental processes	Usually Used	Sometimes Used	Sometimes Used	Sometimes Used
Compensating for missing knowledge	Sometimes Used	Sometimes Used	Sometimes Used	Sometimes Used
Organizing and evaluating your learning	Usually Used	Sometimes Used	Sometimes Used	Usually Used
Managing your emotions	Usually Used	Sometimes Used	Sometimes Used	Sometimes Used
Learning with others	Sometimes Used	Sometimes Used	Generally not Used	Generally not Used
Overall use of strategy	Usually Used	Sometimes Used	Sometimes Used	Sometimes Used

**Table A 12 SAS survey results for case study 2**

Style	Gary	Shelly	Jim	Luke
Activity 1: How I use my physical senses to study or work	Visual	Visual and auditory	Visual	Visual
Activity 2: How I deal with other people	Extroverted	Extroverted	Introverted	Extroverted, Introverted
Activity 3: How I handle possibilities	Intuitive	Concrete-sequential	Intuitive	Intuitive
Activity 4: How I approach tasks	Closure oriented	Closure oriented	Closure oriented	Closure oriented
Activity 5: How I deal with ideas	Global	Global and analytical	Global and analytical	Global and analytical

#### 8.10. Assessment requirements: pre-course business English communicative competence test

The business English communication evaluation test was extracted from published *Cambridge Business English Test Preliminary* with formatted listening, reading, writing and speaking tasks, suited to business scenarios. 25 of the employees and department heads completed the test sections in reading and listening in one hour. The results were analyzed by SPSS data descriptive function and are illustrated in **Table A 13**.

**Table A 13 Descriptive statistics for multiple choice questions in listening and reading tasks of evaluation test**

	N	Range	Minimum	Maximum	Mean	Std. Deviation	Variance
Evaluation test	25	65	8	73	26.13	13.939	194.298
Valid N (listwise)	25						

The writing section was marked by A, A-, B+, B, B-, C, C-, according to the quality of completion. Statistics have shown that there were one A, eight A-, one B+, two B, eight B-, two C and eight nil within the 30 training participants.

There was an obvious competence gap between the required Cambridge BEC preliminary standards and the actual workplace English competence that training participants possessed. This area required further improvement through training programs and relevant activities, and was known to the trainer before the course commenced.

### 8.11. Program evaluation

The HR manager of company L has organized various training program evaluation methods to assess the effectiveness of workplace English training and the impact of workplace English training programs on the companies. Stephanie explained training program evaluation was necessary to understand the post-course learning outcome, compared to pre-course training. She hoped to see the improvement in “*writing email with customers or communication*” compared to before training. She was then able to judge whether the employees had achieved the learning outcomes and “*whether the investment is worthy*”.

Moreover, Stephanie thought that key performance indicators (KPI) should be built into the measurement of the effectiveness of workplace English training programs in enhancing employees’ workplace English communication abilities. Stephanie explained it would be better to “*embed some very narrow KPI otherwise it would be difficult to evaluate the training outcome*”.

Professional language training companies can usually provide standard English tests to the training participants. In this corporate program, directly after the business English communication training, the trainer conducted a feedback survey, asking for participant opinions and the responses have been that they



found business English communication training “*really very practical*” or “*very useful*”. They liked to communicate in class through speaking to partners and they enjoyed watching videos. They thought both the book and the video were useful. They wanted the class to be interesting and relevant to job. But they hoped the class to have more communication, speaking and listening exercises. Advanced learners from Finance Department emailed drafts from their working documents so that the trainer could directly assist in solving problems in their work. The HR manager and general manager both attended the training and considered business English communicative competence strategically associated with their global business performance. The employees benefited from training by grasping not just language knowledge but also solving global communication problems with overseas partners. The training showed particular relevance when the authentic learning materials and simulation were adopted in the program.

Based on the original Kirkpatrick (1950) model, the training effectiveness could be evaluated by “reaction, learning, behavior and result”. The workplace business communication training was delivered in strong association with authentic job tasks which produced direct contributions to better employee performance results.

From the trainer's perspective, the business English communication training can have optimal effects only if the training content and approaches can satisfy the identified training needs and directly assist the business operation. The trainer observed that trainees from Sales Department had the strongest oral communication requirements in receiving overseas customers with a heavy workload. Those in the Finance Department also had to communicate with overseas financial control center to conduct international settlement and corporate expense reporting etc. Department managers had greater opportunities to consider international business communicative competence as their important competence to function well in their daily business operation. They all had positive comments when evaluating the training program, as it helped them improve.

#### *Influencing factors in vocational context*

##### 8.12. Human resources training and development policy

In Company Y, different positions would have different English communication requirements, which could be certified and assessed by various testing systems. In the recruitment process, Stephanie would look at the “*national certificate to prove the English level and consider the English requirement of a position*”.

Some positions had “*basic English requirements*” while others like the “*departmental managers need English skills*”. HR manager would strike a balance between technological capabilities and English level, as English can be trained at the latter stage.

According to Stephanie, English was indispensable for job success. However HR policy would not link English skills directly with salary. Instead, HR policy encouraged employees to learn English continuously to improve their competitiveness. Stephanie considered training as a “*long-term planning*”. If employees could not meet the standards, English training would be organized. There was no such policy that linked “*English proficiency with salary*”, which was discussed in the job entry based on “*comprehensive ability*”. However, “*career path or internal promotion*” would be provided to those who participated in the training.

#### 8.13. Climate and environment

Workplace *EOP* training interacts with on-the-job professional English use, which facilitates professional English transfer to enhance job performance. Stephanie mentioned in on-the-job use of English and the actual writing process, she can have “*deeper impression*”.

Technology engineer Gary benefited significantly from on-the-job professional communicative competence development. He preferred to have English use in “*daily work or living*” and the employees could have “*some improvement*”. Gary comments: “*it is good to have an atmosphere in which we can often use English. This is saving human resources cost for the company*”. The trainer agreed that on-the-job workplace English competence development was crucial in sustaining the Company Y’s international business performance.

#### 8.14. Resources and support

Stephanie felt that classroom training could provide a concentrated learning platform for employees to develop their professional communication abilities while learning through the Internet offers the flexibility to balance work and study. Stephanie considered the “*training venue inside the company as a learning platform*” and employees could “*stay away from the hustle and bustle of the company*” and concentrate on studying, which was “*helpful to employees’ improvement*”. For online learning, however, employees were able to “*study whenever they want*” and it depended on the “*individuals and the opportunities the company can provide*”.

In addition to online learning, which is flexible and interactive, Gary suggested distance education, which suited the working population:

*If it is distance education, there should also be a fixed time. Time management is very scientific. It should in a period when everyone is free.*

(Gary)

*Workplace English training effectiveness*

*Short-term training program effectiveness*

#### 8.15. Intended learning outcomes

Company Y's HR Manager, Stephanie, found that improving professional communication abilities through training was a gradual process, particularly in spoken English and pronunciation. At the program commencement, the learners were encouraged to "*pick up the knowledge or make up the missing knowledge and they can move to the next stage if training can continue*".

Gary, the technology engineer, was better able to pick up the vocabulary and grammar after the training and "*it is more convenient in communication*". Gary commented: "*there is definitely some improvement, after we have had training for very long time*".

On the other hand, Accountant of Company Y thought that the key to improving professional communication competence was to apply it on the job. However, there were environmental constraints, as English use on the job was reduced when the company became more localized. Jim observed that when the company was supervised by Singaporeans, they could have “*wider space in English communication*”. But the company is now overseen by Shanghai office and there are fewer opportunities to use English, creating “*a feeling of digression*”.

#### 8.16. Learner self-assessment results

More than one year after the completion of the training program, participants Gary, Shelly, Jim and Luke were asked to self-assess their overall language aptitude, document writing and oral communication competence on a rating scale of 1 to 4, representing the proficiency levels from beginner, lower intermediate, upper intermediate to advanced (see **Appendix 7**). The self-assessment results were analyzed using SPSS 21. The results are listed below in **Table A 14**.

**Table A 14: Self-assessment results for case study 2**

	N	Minimum	Maximum	Mean	Std. Deviation
Language aptitude self-assessment	4	2	3	2.25	.500
Writing	4	2	2	2.00	.000

Oral	4	1	3	2.00	.816
Valid N (listwise)	4				

The analytical results showed that the four abovementioned training participants had lower intermediate level of business English communication language aptitude with the exception of Luke who scored highest 3 in overall language aptitude and oral communication. Shelly scored the minimum 1 in oral communication. Thus there is room for further improvement according to the self-assessment results.

For the company as a whole, HR manager has measured employees' English proficiency levels in both written and oral communication. HR manager has given 3 upper-intermediate level to middle-level employees and 2 lower-intermediate to some of the employees. Stephanie thought "*for level-4, that is very good*". She did not think writing was a problem. She scored "*oral communication*" roughly at 3, upper intermediate level.

#### 8.17. Unintended learning outcomes

For the training participants, workplace *EOP* training was a pathway to professional competence development and was useful to employee's job. Gary explained, his English learning was "*mainly for the professional ability*" and it was always "*good for the workplace to have one more skill*" as he would have "*contact with foreigners*".

The human resources manager considered that workplace English skills were indispensable for personal growth and job success. Foreign companies would use English more often and “*job entry requirements*” increasingly include English skills. It was also the “*personal ability improvement to survive the competitive society, in which English is a must, depending on personal development*”. The trainer observed that the major benefits were job related, as developing workplace *EOP* competence can help employees perform better in international communication tasks.

#### 8.18. Difficulties in workplace English use

Although Company Y’s program solved some problems with workplace English use, other difficulties remain. Gary thought the training could help him overcome the difficulties in pronunciation and listening, improving his English speaking skills. Gary explained: “*my original weakness is imprecise pronunciation. The biggest difficulty inaccurate pronunciation has created is in listening*”. If his pronunciation was not correct or was different from that of others, it would affect communication. His biggest improvement through training was in pronunciation and listening with “*standard English with slow pronunciation*”. Gary still had difficulties in listening to English “*with accent or dialect*”.



There were also problems in grammar, colloquial expressions and professional terminology when using the professional communication skills on the job. Jim explained his difficulty lied in responding to fast spoken English. He needed more explanation when discussing “*professional terms*” and struggled to comprehend colloquial English with slang, such as from Australian speakers.

Luke explained that professional terms for product components were used in a very limited scope of “*30-50 words*” when the company mainly designed accessory products. His major problem was in grammar, in which he often misused, due to carelessness, such as in exchanging emails with Singaporean colleagues.

Other difficulties included that employees found it hard to speak English fluently because of nervousness in speech. Gary explained that he often felt nervous when communicating with “*expatriates*” and could not speak as fluently as usual. He attributed this to “*psychological effect*”.

### *Long-term program impact on job performance and business operation*

#### 8.19. Sustainability of learner autonomy

The participants continued their workplace English training and learning through online chatting, browsing English web pages and enrolling in E-learning courses. Jim thought it was because of job, he needed to learn English by “*reading web page or using chatting software*”.

Luke expressed his willingness to enroll in Web (a local training service organization), through which the training could “*target his own English level*”.

The trainer thought these additional initiatives were especially important in sustaining the participants’ learning autonomy and ensuring long-term learning outcomes.

#### 8.20. International business communication performance

Company Y’s HR Manager, Stephanie, and the employees thought that professional English communication skill development could improve the company’s international business communication performance to a certain

extent. Miscommunication resulting from professional English incompetence could lead to productivity reduction and increase business costs.

Stephanie indicated that the international business communication was confined to *“technical communication after the order and onsite visits”*. The performance would *“not influence the sales volume as employees won’t get the order outside”*. However, business performance would be influenced as *“if communication is not good, there will be some misunderstanding”*. However, Stephanie thought English played a small role in it.

Moreover, Gary indicated that English played a big role in technical communication. Mistakes could be avoided if the employee spoke good English:

*If English is not good, foreigners may have misunderstanding’. This created problems in technical discussion of for instance the product parameters. Miscommunication can lead to mistake in production which ‘brings up the cost. If there is misunderstanding, there will be not only low efficiency, but also misunderstanding. There will also be loss. (Gary)*

Jim summarized that if English is good, there would be higher productivity and lower cost.

#### 8.21. Return on investment

HR Manager Stephanie expected reasonable ROI from allocated funds on workplace *EOP* training programs. Stephanie commented group training may be “*good to companies*”. It also needed to contribute to the ROI.

The trainer thought cost saving was an important consideration of the factory which preferred group training instead of small tutorial to avoid wasting company resources. The trainer found the company Y’s program to be cost effective.

#### 8.22. Skills development for employability and employment

Technology engineer Gary from employee’s perspective thought that professional English ability was a must in a foreign invested company, especially at the middle management level. Professional English skills were also important for personal development. He explained that English language ability could help an employee to be a “*manager in a foreign company*”.

Otherwise, one may end up in the “*lower level in the foreign company*”. He also indicated that “*English training is on personal competence and helps to develop English ability in a concrete way*”.

Stephanie agreed that the training developed skills which could generate better job performance outcomes. She also believed that language training was indispensable to personal employment success. Stephanie argued that English language ability was both a societal demand and job need:

*With the development of society, English has got more attention and is indispensable. In the daily work, either through email or face-to-face communication, including communication with the superiors, English is needed. (Stephanie)*

The trainer found it natural to view workplace English communicative competence training as a process of skills development for employability and employment as the program objective was clear, for better job performance.

### 8.23. Conclusion: answers to research questions for case study 2

*How effective are EOP training programs in preparing employees for global business communication in the workplace?*

In this case study 2, the workplace *EOP* training program was considered useful and practical to the training participants according to an end-of-course survey. Though 25 out of 30 training participants joined in the pre-course assessment and gained an average score of 26 at the proficiency level of Cambridge BEC preliminary listening and reading test, only four of them have partially completed an end-of-course assessment. Nevertheless, the self-assessment results with four training participants more than one year after training program completion have revealed that they have reached an upper-intermediate level of language aptitude, though there is room for further improvement.

Moreover, this training program has helped to solve workplace English problem even though there remains difficulties in grammar, professional terminology, colloquial expression, listening and speaking found in different training participants. In addition, after the program, the training participants have been able to apply the acquired knowledge to on-the-job workplace business English communication and this could reduce misunderstanding and increase productivity. Because of the increased productivity, three of the training

participants have received 10% salary increase while another received 20% salary rise, which are positive signs of career advancement. This could be evidence of the program's unintended outcomes. In addition, this workplace business English training program has been important in maintaining the company's international business communication performance and ensured smooth merger and acquisition process.

*What factors contribute to and hinder the effectiveness of EOP training programs in the workplace?*

In this case study 2, the class size of 30 people with mixed proficiency levels was difficult for the trainer to handle. Most of the interviewed participants would prefer to have smaller group or one-on-one format so that the training program can be more effective. In addition, the class time was in the evening. It made training participants tired and the training program was less effective than if the training time had been rearranged to Saturday day time.

The training needs analysis was thorough in its presentation of the training gap the program was to address. The course content and material provided by the trainer included templates of email, fax and report, directly applicable to the workplace context, which were helpful and relevant to the training participants'

job. The process of training delivery was linked to the course materials. Moreover, more business cases and interactive group forums were suggested to increase the authenticity and liveliness of the program, so that it can be more effective. These were all contributing to the program effectiveness.

This case company did all it could to motivate employees to participate in the workplace business English training program as English was an indispensable skill for job success. The company has also been working towards building up a learning platform for employees to learn English after work, although most of them have heavy workloads, which may reduce program effectiveness.

This case study 2 of workplace *EOP* training program in company Y has been effective in improving job performance. The training material has been particularly helpful to the training participants with those templates directly transferred to the job context. Interviewed training participants have also achieved career advancement, evidenced by increased salaries. The effectiveness of case study 2 was reduced by an overly large class size and unfavourable class time arrangement. The employees' heavy workloads also reduced the program effectiveness. Nevertheless, this case study has been supported with favorable HR policies, which has helped with improving the training effectiveness.



## CHAPTER 9

### FINDINGS IN CASE STUDY 3 OF *EOP* TRAINING IN A MAINLAND CHINA DISHWASHER PRODUCTION COMPANY N

#### 9.1. Introduction to case study 3 - Company N

The Chinese dishwasher manufacturer has been acquired by an Italian global company. To facilitate the merger and acquisition, the expatriate Italian general manager expected to communicate more with his Chinese employees. However, the managerial staff did not possess adequate communicative competence. Thus, the HR Department organized a three-month workplace *EOP* training program for middle-level staff members with production, quality control, accounting, sales, managerial and HR functions.

#### *Influencing factors in program design*

#### 9.2. Training needs analysis

The training needs were collected through Company N's HR department. The trainer received the information through talks before the course commenced. The information was used to determine the course level and textbook, which were approved by the training participants.

However, compared to the rich and varied training needs and requirements elaborated in the post-course qualitative interviews by training participants and the HR Officer, the training needs analysis in the initial stage may have been inadequate to address the following job specific needs, as the trainer was not aware of the job context at the time.

In the post-course qualitative interviews, Michael, Quality Control (QC) in company N said he had more business English communication with his QC colleagues in Wuxi and Marketing colleagues in Singapore. He explained that the QC Department in Wuxi had “*more English communication with overseas SQE colleagues*”. Under “*product marketing*”, the Marketing Department was required to have “*constant English communication with Head Office in Italy and offices in Southeast Asia, Australia and New Zealand. For the Pacific market, English is used all the time*”.

Sarah, general manager secretary for Company N had daily communication with the Italian boss and had to handle English telephoning and email every day. Tania, R&D Engineer for Company N had stronger departmental needs in technical English communication. She worked in “*projects, products, technological specification, and testing requirement*” and had to “*read*

*international technical materials, international standards and translate.*

*English use in the department is more professional specific”.*

Regarding written communication, Michael in QC had to handle inspection reports and quality improvement, which involved weekly or monthly reports, shared with HQ colleagues. There was also email communication. George, the purchasing officer at company N, also involved contacting EU Headquarters through the text of contracts. Tania had to handle “*testing report and the compilation of technical specification brochures. There is also some project summary (in English to prepare)*”. Tania’s written communication was achieved through email and documents.

In oral communication, Michael, George and Tania had to handle overseas conference calls. Michael explained there was “*less presentation*”. More often it was “*conference call and weekly simple communication through the telephone based on a report*”.

In Singapore, there were several workmates from China, Malaysia and Italy joining the conference call while in Wuxi, there was the only Italian boss. Michael explained in Singapore, he was responsible for “*Pacific marketing and product development*”. He had to communicate “*a lot of project stuff*” with

*“overseas customers, laboratory people and government staff”*. Moreover, George had to handle meetings in English, telephoning in English and sometimes English presentation.

These functional differences and regional variation in English communication requirements have generated different workplace English training programs for Company N. Michael elaborated on the differences in the English training programs conducted in Wuxi and in Singapore. In Wuxi the training course focused on *“Cambridge English, emphasizing grammar and daily communication”*. In Singapore the course has a focus on business, emphasizing *“professional English use and daily communication skills”*.

Furthermore, Pamela, Company N’s HR Officer, explained that the workplace English training in company N was organized based on *“job needs”*, which were *“important to foreign enterprises”*. For her position, she needed to summarize *“employees’ probation, to be approved by the boss”*. Workplace English use was needed in *“communicating with the boss, overseas suppliers and reading overseas materials”*.

### 9.3. Course objective

The course objective was to enhance managerial level professional English competence by focusing on the communication skills of listening and oral communication in the context of the daily business operation of the dishwasher manufacturing process.

### 9.4. Course content and materials

The course content and materials were compiled from professional course books and handouts tailored to business scenarios, which are described first, followed by evaluative feedback from the interviews with case study participants and trainer's reflection. These course materials are then compared and contrasted with authentic business communication document samples collected from the participants.

The training topics were based on the course materials from *New Interchange English for International Communication 3* (Richards, Hull and Procter, 2000), and were designed to enhance the employees' spoken and written competence. There were 16 units in the textbook, supplemented with personalized spoken and written handouts, designed by the instructor. The training covered the topics dealing with consumer complaints, communication across cultures,

education and learning, career moves, self-improvement, challenges and accomplishment. The training topics were wide ranging and covered different aspects of international communication.

In the program in Wuxi, the trainer linked the learning materials to real-world business scenarios by introducing professional terms in industry and authentic workplace international communication language, knowledge and skills.

Samples of supplementary handouts are demonstrated below.

### **Sample handout**

Discussion, Problem Solving and Communication

#### **1. Company Vision**

Company Objectives for a sustainable future:

##### *Economic*

Consolidate the Company's size

Boost production efficiency

Develop markets with the highest potential

##### *Social*

Fully understand consumers' needs

Consolidate projects involving stakeholders

Guarantee employees' health and safety

Offer innovative products and services that deliver real consumer benefits

Increase the number and quality of relationships with clients

##### *Environmental*

Identify areas for environmental performance improvements, with internal measures and environmental indicators

Optimize production to minimize impact on the territory

Develop innovative and competitive products with respect for the environment

Guarantee clients even greater safety in using products

#### **Questions**

1. Can you describe your typical working day to us?

2. Can you share with your partner your role and responsibility in realizing the value of your company as shown in 1? How do you communicate these values to your partners? One Example.

3. How important is communication to your job?
4. What is the most/least frequently used communication channel in your work? (meeting, report, letter, telephone, fax, email, memo, note etc.)
5. How do you see the relationship between your company and environment/society/community/neighbor/customer/vendor etc.?  
Supplementary Oral
6. How have you changed?  
How have you changed in the last five years? What do you want to change now?

Describing how you've changed?

I used to be...but now I am...

I am more....now. I enjoy...

Describe how you'd like to change?

I am interested in...

I'd like to be more

Three Things I've changed	Three things I'd like to change

Compare charts with a partner. Ask follow-up questions.

Michael, QC officer at the company, felt that the textbook, which targeted trainees with a foundation for learning, was adequate. The workplace English training program in Wuxi was a general English course. Michael observed that if it had “*referred to industry, the course would be more special and cover areas of quality, commercial, marketing and product*”. He also experienced the training course in Singapore, which covered mainly business themes. The teacher was from U.S. and trainees were from different countries and the communication is in English only.

Michael recommended adding more company or daily living related cases into the course content to supplement the learning materials. Employees, particularly

those from the purchasing department, had to handle daily email correspondence on financial matters, as illustrated in the following samples from George. These samples are practical demonstration of the application of workplace English competence in solving realistic problems in the arrangement of meetings, purchasing and production schedules. There are occasional grammatical errors. But the language is clear, short and straightforward, in compliance with the business English communication principles. The workplace *EOP* program could have been more useful to employees if these samples had been brought into class for discussion.

#### Sample 1 Meeting Schedule

Hi:  
We plan to visit your company and meeting on 21 Aug, please arrange. Our member is: \*\*\*\*. Please help us booking 4 rooms in Sheraton on 20 Aug. We will arrival XXX station by train. The train information is XXX 19:18 – 19:41  
THANKS AND BEST REGARDS

#### Sample 2 Purchasing

Hi:  
Supplier total printed XXX products (including XXX produce we order before), please check the offer!  
The total cost is XXXX USD (including the air cost to XXX). Deduct the cost XXXX USD for XXX pcs sample. So we need added the cost is XXXX usd.  
Anyway in supplier hand they still keep XXXX USD last time, so if you confirm the qty and price, after the delivery, supplier still have XXXXUSD in hand.  
Please confirm if you can accept the XXX pcs and the price, then supplier can arrange delivery it by air in next week, also please inform me who will receive the products (I think somebody still in holiday next week)  
And for the mould will be delivery by ship on 18 Aug, XXX plant is 17 Sep, please confirm me if it's ok.  
Next week Wuxi is in holiday, any urgent things you can call my MB: XXX  
Thanks and best regards



### Sample 3: Production schedule

Dear:

As I call you this morning, please give me the qty, weight and packing size after you finish all material. And also give me the offer for the products (FOB Shanghai).

\*\*\*\*\*

Hi:

400 pcs samples will be sent by air arranged by supplier, how about the added pieces, if need arranged by air, or can arranged by sea together with mould. Now we can't catch the ship on 11 Aug. I will try to arrange the ship on 18 Aug.

Thanks and best regards

\*\*\*\*\*

Dear,

After yesterday I talk with\*\*\*, about plastic pieces production code XXX let us do in this way:

1) please, do one lot as we signed in the contract of XXX pcs;

2)add more or less XXX pieces (all material POM you have in the bag and finish it);

Let me know the total quantity.

When you will do it, please tell me by mail the exact quantity so XXX will use the money budget jet in your hand to pay all the pieces.

In that moment you could send out the mold to XXX.

Let me know if any problem will occur.

### 9.5. Class size

Trainer felt quite comfortable with the 12-person group format. Michael thought that the 12-person group was a good platform for inter-peer communication and teamwork cultivation. Joan, the accountant preferred one-on-one teaching because she felt it would be more targeted and suitable. However, having several people in a group allows the trainees to communicate, such as in a workshop, and everyone makes progress.

#### 9.6. Class time

This corporate program ran from October 2006 to December 2006. Its total program length was 32 teaching hours. Class time was from 4:30 - 6:30, spanning both working and after-work hours. The training participants were happy with the arrangement and they enjoyed the class time.

#### 9.7. Conception of teacher's role

In this corporate program, the trainer reflected that she prepared the materials and delivered the course. The trainer in this case played the roles of material writer and course instructor.

#### *Influencing factors in program implementation*

#### 9.8. Views and understanding of teaching and learning: delivery and methods

The trainer reflected that the delivery of the training program was enjoyable and covered the necessary steps in program implementation. Based on previous training needs analysis, workplace business English training approaches were integrated, encompassing *EOP/ESP* needs-based, text-based, content-based and

task-based approach, communicative competence development skills-based approach, simulation, conversation, cases and real world scenarios, construction of workplace learning and training climate, tailoring of the workplace learning curriculum, selection of instructional media, instructional design (including pre- and post-training activities) and one-on-one or peer tutoring.

In one scenario “what’s wrong with it?”, the training focused on dealing with consumer complaints. The training participants each raised an authentic work scenario of consumer complaints about the product or business processes and described the methods of handling the complaints. A model conversation audio was played to showcase the best practice conversation. The trainer then facilitated pair work between two partners and role play in the typical consumer handling scenarios. The training session was also complemented by the learning practice of making and handling complaints through collaborative writing and reading the text of consumer affairs

In summary, the effectiveness of using more than two different approaches in one scenario of learning topic depended on the nature and type of workplace business English communication skills, knowledge or competence. For training of reading skills, text-based and content-based approaches can be more targeting at improving the reading literacy. For training of writing skills,

task-based and real world scenarios are more effective in assisting employees' writing competence in their daily work settings. Oral communication training can adopt a wide range of training approaches due to the higher level of complexity involved in the task. Trainers may introduce the instructional media to showcase the best practice communication, create simulation and role-play conversations for hand-on exercises and design the pre-training and post-training activities for a good training and learning climate to enhance the quality and competence of oral interaction.

Michael had experiences in non-language subject training, which also provided chances for developing workplace English communicative competence. He introduced the group's "*orientation training and work ethic training in English*". The website contained a "*training textbook and everyone has to pass the exam to take the job*". Michael also mentioned the "*technical training in Italy*" in which his "*HQ colleague talked about product and marketing related staff for two weeks*".

In commenting on the process of teaching and learning in the workplace *EOP* program, Michael observed that role play was often used including "*dialogue*" in the training. In Singapore, the role play was done in English. George, the purchasing officer at the company, preferred classroom-based spontaneous oral

practice/conversation practice. He also recommended other training methods that can be used in workplace English training programs, such as “*case studies, practice, coaching and the cultivation of thinking ability*”.

#### 9.9. Students’ workplace English learning styles, learning strategies, motivation and personality

In this case study 3, the written survey (see **Appendix 7**) has provided information on training participants’ profile (see **Table A 15**), analysis of second language learning strategy (see **Table A 16**) and analysis of second language learning style (see **Table A 17**).

Each of the training participants works for different departments within Company N (QC, General Manager office, R&D, Purchasing and Finance). All of them hold bachelor degree, but with different specialization, such as engineering, computer or accounting. They all have 10 or more than 10 years’ work experiences. Michael changed his job twice and achieved 10% salary increase while Tania changed her job once and received 10% salary rise. Their motivation of learning workplace English is job related, such as enabling more effective communication with headquarters (HQ), better work and the acquisition of formal correct words and sentence directly on the job.

Michael used learning strategies more often than the rest of the participants. George has low frequency of using memory strategies. Michael has higher frequency of using cognitive strategies, compensation strategies, meta-cognitive strategy and social strategy. Tania has lower frequency of using compensation strategies. George is low in meta-cognitive strategy and affective strategy. Sarah is low in emotional strategy while Joan is low in social strategy.

In the written survey of learning strategy, Michael wrote *communication*. Sarah, Tania and George wrote *learning on the job, work related communication*. Joan wrote *listening and reading while watching multimedia programs*. These add extra information into the SILL survey results.

In analyzing the participants' work and study styles, Michael rely on auditory and hands-on senses. Sarah simply relies on hands on sense. Tania and Joan relies on visual and auditory senses while George relies on visual, auditory and hands-on senses. Michael, Sarah and George are both extroverted and introverted while Tania and Joan are extroverted. In how I handle possibilities, Michael is both intuitive and concrete-sequential. Sarah and George are intuitive while Tania and Joan are concrete-sequential. In how I approach tasks, Michael, Sarah, Tania and Joan are closure oriented while George is both

closure and open oriented. In how I deal with ideas, both Michael and Sarah are global and analytical while Tania, George and Joan are global.

In the written survey of learning style, Michael wrote *communicating with each other*. Sarah and Tania wrote *participating in technological training*. George wrote *language communication, assisted by reading* while Joan wrote *language communication*. These added extra information into the SAS learning style survey.

**Table A 15 Training participant profiles for case study 3**

Name	Michael	Sarah	Tania	George	Joan
Company	Italy-based Global Company N in Home Appliance	Italy-based Global Company N in Home Appliance	Italy-based Global Company N in Home Appliance	Italy-based Global Company N in Home Appliance	Italy-based Global Company N in Home Appliance
Department	QC-Marketing	GM Office	R&D	Purchasing	Finance
Position	QC Supervisor	Secretary	Homologation Engineer	Buyer	Accountant
Education qualification	Bachelor in Computer	College	Mechanical Design Engineer	College	Bachelor in Accounting
Work experience	7~10 years	11~13 years	11~13 years	11~13 years	11~13 years
Salary increase %	10%	n/a	10%	n/a	n/a
Job change	2	n/a	1	n/a	n/a
Motivation of workplace English learning	Personal preference	More effective communication with HQ	Learn formal words and sentences, correct grammar	Constant communication by email with overseas companies	Better for job

**Table A 16 SILL survey results for case study 3**

Strategy	Michael	Sarah	Tania	George	Joan
Remembering more effectively	Sometimes Used	Sometimes Used	Sometimes Used	Generally not used	Sometimes Used
Using all your mental processes	Usually Used	Sometimes Used	Sometimes Used	Sometimes Used	Sometimes Used
Compensating for missing knowledge	Usually Used	Sometimes Used	Generally not used	Sometimes Used	Sometimes Used
Organizing and evaluating your learning	Usually Used	Sometimes Used	Sometimes Used	Generally not Used	Sometimes Used
Managing your emotions	Sometimes Used	Generally not Used	Sometimes Used	Generally not Used	Sometimes Used
Learning with others	Usually used	Sometimes Used	Sometimes Used	Sometimes Used	Generally not Used
Overall use of strategy	Usually Used	Sometimes Used	Sometimes Used	Sometimes Used	Sometimes Used



**Table A 17 SAS survey results for case study 3**

Style	Michael	Sarah	Tania	George	Joan
Activity 1: How I use my physical senses to study or work	Auditory and hands-on	Hands-on	Visual and auditory	Visual, auditory, hands-on	Visual and auditory
Activity 2: How I deal with other people	Extroverted, Introverted	Extroverted, Introverted	Extroverted	Extroverted, Introverted	Extroverted
Activity 3: How I handle possibilities	Intuitive, Concrete-sequential	Intuitive	Concrete-sequential	Intuitive	Concrete-sequential
Activity 4: How I approach tasks	Closure oriented	Closure oriented	Closure oriented	Closure oriented, open	Closure oriented
Activity 5: How I deal with ideas	Global and analytical	Global and analytical	Global	Global	Global

#### 9.10. Program evaluation

The trainer led the class to a natural end without formally evaluating the workplace English training program immediately after the course was completed. The participants agreed that the program evaluation should be conducted via surveys. Tania explained that her previous trainer evaluated the training end-of-course survey to see “*satisfaction after the course*”.

After more than five years, the training participants acknowledged that through joining the workplace English training, there had been improvement in knowledge acquisition and enhancement of confidence. Joan explained, periodical English training enhanced her chances of English practice and improvement in daily communication. Tania added that it was a good chance to learn new things.

#### *Influencing factors in vocational context*

#### 9.11. Climate and environment

The training participants were concerned about the working language, which is Chinese in many companies and can create barriers to employees' professional

English communication skills development. Sarah, the general manager's secretary, explained that at the Wuxi branch, there was "*little environment*" for her to use English in her job and thus the "*scenario would not recall the newly acquired knowledge*". Joan and Sarah agreed that a multimedia method would be better than reading books and rote learning, where dynamic and flexible scenarios would be needed.

After the program, the training participant Michael felt his English improved the most in Singapore, in the English working context and digressed after his return to China. The business environment seemed to constrain his success in English learning. The trainer agreed that the long-term learning outcomes can be hindered by the specific business environments.

The trainer was also concerned that Chinese as the workplace language could constrain the workplace English training effectiveness, but this may be compensated for by the provision of English multimedia resources.

#### 9.12. Resources and support

In this case study, resources and support are realized through on-the-job communicative competence, frequent English communication at the

departmental level or by joining in company English training. The trainer thought participants' on-the-job communicative competence development was more effective and positive to the long-term learning outcomes.

For example, Michael experienced the change of business functions from quality control to marketing in the company's Singaporean subsidiary, which required a large amount of on-the-job professional English communication practice. This job change contributed to his workplace English communicative competence development and career enhancement. Michael compared his experiences in Wuxi and in Singapore. In the Wuxi branch, the communication focus was on "*daily work, such as on quality*" whereas in Singapore, English communication focused on "*marketing and business*". In Singapore, daily communication including dining and activities was conducted in English. Michael also mentioned his "*shopping and business trip to Italy and Australia*" were all conducted in English, giving him opportunities to improve his language skills.

The training participants thought they could obtain professional improvement in communication by joining in the workplace training programs. George explained that "*some courses can improve his business communication ability*".

Some courses targeted at “*purchasing ability*” and his professional ability improved.

*Workplace English training effectiveness*

*Short-term training program effectiveness*

#### 9.13. Intended learning outcomes

In the post-course interviews, the employees stated that their present English proficiency was at CET-4 or lower levels. Michael explained he had “*passed CET-4, not CET-6*”. Tania had passed CET-4 as well whereas George had only reached CET-2. George commented that since entering the company, his vocabulary increased but grammar was not good. In this case study, in addition to learner self-assessment, CET-4 could also be used as a communication competence benchmark.

#### 9.14. Learner self-assessment results

Pamela, HR Officer at Company N, performed a statistic calculation. In their overall workplace English competence, 30% of the participants were at level 2 (lower intermediate), 50% were at level 3 (higher intermediate) and 20% were

at the advanced level 4. For workplace written communicative competence, 10% of the participants were at level 2 (lower intermediate), 40% were at level 3 (upper intermediate) and 50% were at the advanced level 4. For workplace oral communicative competence, 5% of the participants were at level 1 (beginner), 15% were at level 2 (lower intermediate), 40% were at level 3 (upper intermediate) and 40% were at the advanced level 4.

The training participants Michael, Sarah, Tania, George and Joan were asked to complete a self-assessment of their language aptitude five years after the completion of the program. They rated their written and oral communication abilities on a 1-4 rating scale, representing the proficiency levels from beginner, lower intermediate, upper intermediate to advanced (see **Appendix 7**). The results of self-assessment were analyzed using SPSS 211 and are listed in **Table A 18**.

**Table A 18: Self-assessment results for case study 3**

	N	Minimum	Maximum	Mean	Std. Deviation
Language aptitude self-assessment	5	2	3	2.20	.447
Writing	5	2	3	2.40	.548
Oral	5	2	3	2.40	.548
Valid N (listwise)	5				

This table has shown that case study 3 training participants had an upper intermediate level of language aptitude. Michael scored 3 in language aptitude, writing and oral communication. Sarah scored 3 in oral communication while

Tania scored 3 in writing. These training participants had the potential to reach the advanced level of competence.

#### 9.15. Unintended learning outcomes

The training participants stated that participating in the workplace English training programs was beneficial to the cultivation of teamwork spirit. Michael explained as the “*teaching model is a workshop*”, he could study together with his colleague in the factory which helped to build up their teamwork in daily communication. They could understand each other using English, which increased “*communication methods or channels*”. Michael considered it a “*platform of communication*”. Tania indicated that she had an increased confidence after talking with her teacher and participating in classmate discussion in the classroom environment. The trainer also observed synergy among the training participants which was good for organizational development.

#### 9.16. Difficulties in workplace English use

Company N’s employees experienced various difficulties in on-the-job professional English communication, particularly in oral communication. The

specific difficulties included listening comprehension, accent, vocabulary and English expressions. George described problems of “*listening and speaking in teleconferencing*”. It was difficult for him to understand Italian English because of the accent and the lack of vocabulary, but he could comprehend talk about familiar topics and expressed his meaning using “*simple words*”.

Joan explained that she could get used to the accent in her listening process. She thought it was difficult to coordinate the training focus when different departments had “*different focuses*”. Joan thought that the “*focus of English training should be on improving oral English as the company did not have the language environment*”. She felt that listening and speaking abilities should be the focus of training rather than reading and writing which “*won’t be a too big problem*”.

Tania further explained that she could also get used to the accent in the listening when she was “*familiar with the speaker or she knew the topic well*”. She viewed oral communication as the biggest barrier as she could not find one to communicate and she found it difficult to talk in English, which she considered a bottleneck.



### *Long-term program impact on job performance and business operation*

#### 9.17. Long-term learning outcomes

The training participants felt that the long-term learning outcomes depended on the frequency of professional English use on the job. Michael elaborated:

*In previous time, my work is confined to a small area. After that course, I have practiced a lot. After I returned to China for more than one year, the frequency of English use also lowered. Later there is more English professional vocabulary used in some emails or reports. But communication here is basically in Chinese, so there is not much use in this. English will be more used if I work overseas. (Michael)*

#### 9.18. Sustainability of learner autonomy

In this corporate program, the trainer observed sustained and autonomous workplace English learning activities in various forms such as online learning and on-the-job practice, some of which provided good learning outcomes for the training participants, such as Michael.

In addition to the classroom-based training, the training participants engaged in online self-access workplace English training and on-the-job professional English practice to improve their professional communicative competence. Michael explained that, although he did not participate in “*online training*” along with the “*traditional training*”, he did read some email newsletters. He used English in the Singapore office and he learned through “*online learning materials on the HQ website*”. He also joined in some “*English related activities in Wuxi and Italy*”.

The participants also studied English after the training programs by watching movies and practicing on the job. George explained that he sometimes watched English movies but did not persist very long. He preferred the classroom and he has tried some “*web-based training*”. On the job, George practiced English by communication with “*expatriates, in the meeting and in the work*”. He also believed he could improve by watching videos.

#### 9.19. International business communication performance

The participants found it difficult to quantify the contributions of workplace English training programs to international business performance. Michael believed that the decision ultimately belonged to the boss. Since the boss

considered the training as effective, the workplace *EOP* training programs had been held several times.

The participants thought that developing workplace English skills resulted in smoother international business communication and increased global business expansion opportunities. George explained, English skill can “*improve employability*” and enhance his internal employment opportunities. With good English, he can “*have communication with European colleague and understand more about European and global economy, which facilitated business development*”.

#### 9.20. Return on investment

Company N’s purchasing officer, George, thought that companies should have more returns and output through investment in workplace English training programs. Other training participants agreed that training was a kind of investment, the value of which depended on the company’s philosophy on workplace English training. Tania thought the training benefited both the “*overall company operation and the job*”. It was less costly to train in a group than to conduct individual training, and language training guaranteed that employees’ English level was “*not falling down*” and was worth the investment.

#### 9.21. Skills development for employment and employability

The participants thought that as their workplace becomes more international, the development of their professional English communication skills could improve their job promotion, job admission and career path. Michael explained that the company's internal communication was all in English. In his previous department in "*finished product quality control*", he used less English. After his transfer from "*CSQ to SQE, to take charge of the big department*", however, he used English more often to communicate with "*overseas SQE*". Michael confirmed that "*English can benefit my promotion*". Later he transferred from Wuxi to Singapore because of his good English, which he said played "*an unforgettable role in his development on the job*". George agreed that English could enhance the "*possibilities of job promotion*".

The training participants also thought that developing professional English communication skills can help their job application. Sarah thought English skills were "*useful in recruitment*" while Joan stressed that "*good English is helpful in job application*". Pamela indicated that workplace English competence not only benefited job ability, but was also an important aspect in job promotion and salary increase.

#### 9.22. Conclusion: answers to research questions for case study 3

*How effective are EOP training programs in preparing employees for global business communication in the workplace?*

The self-assessment results from the Company N study, recorded five years after program completion, exceed those of Company L and Y. The average score was 2.2, upper-intermediate level. The intended outcome was particularly good on Michael who frequently used second language learning strategies and enjoyed international career development through his transfer from Company N's Wuxi subsidiary to an overseas subsidiary. There was also improvement in workplace *EOP* competence, although there was no post-course assessment to prove the "immediate effectiveness" because the training participants were not willing to be tested at that time. Five years after program completion some difficulties remained in "listening comprehension, accent, vocabulary and English expression". Most of the participants had sustained their English learning through on-the-job communicative competence development activities and watching multimedia programs.

The 12-person group from Company N cultivated teamwork spirit and enhanced inter-peer communication, which generated positive unintended outcomes. The training program also ensured smooth international business

operation in, for example, international teleconferencing. It also played an essential role for employees to maintain their employability and excellence in job application.

However, due to business problems, Company N did not experience business expansion. It retained its R&D and sales where considerable international business communication was needed.

*What factors contribute to and hinder the effectiveness of EOP training programs in the workplace?*

The training needs analysis was inadequate to gather sufficient information prior to the course commenced, although the course materials were deemed acceptable to cover the required learning content. If workplace discourse had been built up in company N, the course materials could have targeted the real-world work and problems the training participants may encounter in their job.

The 12-person class size was comfortable for the trainer and there was no complaint about the class time, which was in the evening. For climate and environment, unlike the Singaporean subsidiary, where English was the

working language, the Wuxi subsidiary used Chinese as the working language, which reduced chances for further development in international business communication. The participants turned instead to on-the-job international communication activities such as English meetings to enhance their workplace *EOP* competence.

Company N has organized several rounds of in-house workplace English training programs to support employees' workplace *EOP* competence development.

This case study 3 of *EOP* training in company N has been successfully implemented with a comfortable 12-person group. The training program has been effective in improving participants' international business communicative competence. One participant has achieved success in its international communicative competence development while enjoying an international career. The other participants have continued to have some difficulties with the use of *EOP* in their work. One constraint to good learning outcomes has been in the lack of English use climate and environment, in the Wuxi, mainland China's office. Nevertheless, on-the-job English use does provide a way out of such constraints, allowing further improvement.

## CHAPTER 10

### DISCUSSION

This chapter integrates and interprets the findings from both stage one and stage two studies to answer the research questions mainly on the effectiveness of workplace *EOP* training programs and factors influencing training program development and implementation processes. The discussion of these findings also strongly confirms the findings from previous studies in various contexts.

#### 10.1. Integrated answers to research questions for case study 1, 2 and 3

*How effective are EOP training programs in preparing employees for global business communication in the workplace?*

The case studies used surveys, observation, documentary analysis and semi-structured “interviews to obtain qualitative information” (Posavac and Carey, 2003, p. 241) on the training effectiveness and learning outcomes of three workplace *EOP* training programs conducted in Wuxi, mainland China,



according to the training program evaluation framework. The findings were used to answer Research Question 1.

The answer is that these *EOP* training programs were effective in preparing employees for business communication immediately after the course ended. The self-assessment results show that all three programs reached an average language aptitude of intermediate (lower or upper) competence. While the immediate training effectiveness was clear, the long-term outcomes were difficult to be identified as there were many variables influencing the training participants' workplace communicative competence development. The variables include whether the training participants can apply what they have learnt in the training program to their real-life work and whether they can have on-the-job communicative development opportunities. There were individual success cases in which the training participants excelled through workplace English communication job performance.

In addition to improving *EOP* competence on the job, there is also evidence that workplace English training programs benefit international business performance of companies from an organizational perspective. The programs in the case studies provided empirical evidence of the training effectiveness of workplace *EOP* training programs, as summarized in the following **Table A 19**.

**Table A 19 Effectiveness of workplace *EOP* training**

Workplace English training effectiveness variables	Case study 1	Case study 2	Case study 3
Intended outcomes	<ul style="list-style-type: none"> <li>Engineers obtaining the English machinery training certificates in the U.S. with immediate effectiveness after the training</li> </ul>	<ul style="list-style-type: none"> <li>Gradual improvement in professional communication ability</li> <li>No writing problem</li> </ul>	<ul style="list-style-type: none"> <li>English proficiency is at CET-4 or lower levels</li> <li>Intermediate level of proficiency</li> <li>Oral communication still difficult to some employees</li> </ul>
Unintended outcomes	<ul style="list-style-type: none"> <li>Professional improvement</li> <li>Salary increase</li> <li>Personal confidence</li> <li>Personal development</li> <li>Career enhancement</li> </ul>	<ul style="list-style-type: none"> <li>Indispensable for personal growth and job success</li> <li>Pathway for professional competence development</li> <li>Useful to employee's job</li> <li>Enhancing job performance</li> </ul>	<ul style="list-style-type: none"> <li>Benefits to teamwork and the cultivation of teamwork spirit</li> </ul>
Long-term learning outcomes	<ul style="list-style-type: none"> <li>Decline in further improvement in the longer term</li> </ul>	<ul style="list-style-type: none"> <li>Long-term learning outcomes not measurable</li> </ul>	<ul style="list-style-type: none"> <li>Depending on the frequency of professional English use on the job</li> </ul>
Difficulties in learning/workplace	<ul style="list-style-type: none"> <li>Inability in comprehending the English training 100%</li> <li>Insufficient vocabulary, incorrect pronunciation lack of English thinking</li> <li>Problems in constructing sentences and using correct words in communication with domestic customers</li> </ul>	<ul style="list-style-type: none"> <li>Problems in grammar, colloquial expressions and professional terminology</li> </ul>	<ul style="list-style-type: none"> <li>Difficulties in listening comprehension, accent, vocabulary and English expressions</li> <li>Difficulties for practicing oral English due to the lack of English speaking environment</li> </ul>
Sustainability of learner autonomy	<ul style="list-style-type: none"> <li>Alternative training and learning activities such as enrolling in training course</li> <li>Awareness of persistence and the benefits of learning together with other colleagues</li> </ul>	<ul style="list-style-type: none"> <li>Online chatting, browsing English web pages and enrolling in E-learning courses</li> </ul>	<ul style="list-style-type: none"> <li>Self-access workplace English training and on-the-job professional English practice</li> <li>Watching English movies and joining in English related activities</li> </ul>

International business communication performance	<ul style="list-style-type: none"> <li>Measured through on-the-job performance review, volumes of sales order and results of business expansion</li> </ul>	<ul style="list-style-type: none"> <li>Miscommunication causing productivity reduction while business cost increases</li> </ul>	<ul style="list-style-type: none"> <li>Not many international expansion opportunities</li> <li>Difficult to quantify the contribution to business growth</li> <li>Good to the overall company</li> </ul>
Skills development for employment and employability	<ul style="list-style-type: none"> <li>Facilitate international career development after the enhancement of English presentation skills</li> </ul>	<ul style="list-style-type: none"> <li>Necessary for the middle management level and important for personal development</li> <li>Better job performance</li> </ul>	<ul style="list-style-type: none"> <li>Benefiting job promotion, job admission and career path</li> <li>Facilitating transfer of the competence to actual working scenarios</li> </ul>
Return on investment	<ul style="list-style-type: none"> <li>Return on investment not measured</li> </ul>	<ul style="list-style-type: none"> <li>Reasonable return on investment</li> <li>Cost effective program working with large group</li> </ul>	<ul style="list-style-type: none"> <li>More return and output</li> <li>A kind of valuable investment</li> </ul>
Sustainable livelihoods	<ul style="list-style-type: none"> <li>Facilitating international trade and exchange</li> <li>Promoting business growth, reducing poverty and facilitating regional socioeconomic development</li> </ul>	<ul style="list-style-type: none"> <li>Sustainable livelihoods not measured</li> </ul>	<ul style="list-style-type: none"> <li>Sustainable livelihoods not measured</li> </ul>

### *Short-term training program effectiveness*

In case studies, the most important benefit of conducting workplace *EOP* training, in addition to career development and job promotion from workplace *EOP* training program is the teambuilding platform, which enhances the communication and exchange of ideas on language learning among colleagues. However, there are the environmental constraints, as Chinese is more often used than English on the job.

### *Long-term program impact on job performance and business operation*

In case studies, the short-term training effectiveness has led to the long-term program impact. The more committed employees are to workplace English use on the job, the more professional improvement they achieve in international business English performance. Employees also benefit from multiple language learning methods after work. Workforce *EOP* training programs also contribute to business performance in increasing business expansion opportunities, business growth and the development of companies' overall image. Moreover, employees' workplace English skills development improves the overall corporate image, overseas business expansion and international communication performance to reduce the unnecessary costs generated by miscommunication,

which facilitates international trade and exchange. The three case studies have generated similar answers to Research Question 1.

*What factors contribute to and hinder the effectiveness of EOP training programs in the workplace?*

The findings of this study imply that the workplace *EOP* training programs in the case studies can gradually improve professional English communication competence of the participating employees. However, ultimate success hinged upon the commitment, motivation and the persistence of the participants' self-directed learning three or six months after program completion. The participating employees, especially those with tight business trip schedules, were more willing to choose alternative training and learning methods such as E-learning and online learning programs and to maintain sustainability of learning autonomy. On-the-job workplace English training and learning is also effective in developing communicative competence. Most of the participating employees thought that improving their professional English communication skill, as a part of skills development for employability was a must in job application, promotion, career advancement and personal development in the Chinese labor market. The major findings to answer research question 2 are summarized in **Table A 20** and **Table A 21**.

**Table A 20 Comparative findings in three case studies: program design**

	Case study 1	Case study 2	Case study 3
Training needs analysis	<ul style="list-style-type: none"> <li>• Interview with general manager to decide the course objective and course content</li> </ul>	<ul style="list-style-type: none"> <li>• Training needs analysis in various forms through 25 needs analysis survey, 11 interview sheets and one-on-one talk with HR manager and general manager.</li> <li>• Ensured better course arrangement</li> </ul>	<ul style="list-style-type: none"> <li>• Information is gathered through the HR department to determine the course level and course textbook</li> </ul>
Course content and material	<ul style="list-style-type: none"> <li>• Adequate for the program with two textbooks</li> <li>• Professional vocabulary needed in the supplementary materials</li> <li>• Email writing tasks helpful</li> <li>• Discrepancy with actual writing documents in the workplace</li> </ul>	<ul style="list-style-type: none"> <li>• Using original business English textbook</li> <li>• Technical jargons and cases added into the course materials</li> <li>• Use of templates in the writing exercises helps the job</li> </ul>	<ul style="list-style-type: none"> <li>• Original international communication textbook used and considered OK in meeting the training needs</li> <li>• Supplementary materials effective in training oral and written communication skills</li> <li>• Should bring company or daily living related samples into class</li> </ul>
Class size	<ul style="list-style-type: none"> <li>• 1 teacher, 3-4 students (the most effective)</li> <li>• One-on-one teaching (the most efficient)</li> </ul>	<ul style="list-style-type: none"> <li>• 30-people workshop difficult for trainer to handle</li> <li>• Smaller group or one-on-one format preferred</li> </ul>	<ul style="list-style-type: none"> <li>• Trainer feeling comfortable with the 12-people group</li> <li>• A group of 3-4, or 5-6 also OK</li> </ul>
Class time	<ul style="list-style-type: none"> <li>• On Saturday day time, good time</li> </ul>	<ul style="list-style-type: none"> <li>• Class time in the evening, 2 sessions per week</li> <li>• Due to heavy workload, most people tired</li> </ul>	<ul style="list-style-type: none"> <li>• Class time in the early evening, effective for class implementation</li> </ul>
Teacher's qualifications	<ul style="list-style-type: none"> <li>• Master degree in HR training and development with relevant experiences in workplace English training and tertiary level teaching</li> </ul>	<ul style="list-style-type: none"> <li>• Master degree in HR training and development with relevant experiences in workplace English training and tertiary level teaching</li> </ul>	<ul style="list-style-type: none"> <li>• Master degree in HR training and development with relevant experiences in workplace English training and tertiary level teaching</li> </ul>

### *Workplace EOP training program design*

The three case studies have generated different findings in the dimension of training program design. Training needs analysis as the key part of training program design has demonstrated the unique needs and requirements of different companies in implementing workplace *EOP* training. This has posed challenges to workplace *EOP* trainers of tailoring the program to business specific needs. The training needs analysis process undertaken in the case study 2 was adequate while the information from case study 1 and 3 was gathered through face-to-face talks with the HR managers, which may not have been sufficient.

Course content and materials are composed of textbooks and supplementary materials. The materials used in all three corporate programs were considered adequate. Business English communication templates were considered especially effective and course materials were deemed more effective if authentic business communication documents were brought into class for written and oral communication skills training.

Class size and class time are particularly problematic in case study 2, which may have influenced its effectiveness. In case study 2, the class comprised 30

participants with mixed proficiency levels while the class time was too late (in the evening), given the participants' heavy workloads and difficulties in concentrating due to fatigue. In case study 1 and case study 3, both the class size and class time are suitable for trainer to handle the class environment.

Teacher's qualifications are the same for all of the three corporate programs, which are considered relevant for training *EOP* in the workplace context and can also improve if the trainer develops more practical working experiences in international business communication.



**Table A 21 Comparative findings in three case studies: program implementation**

	Case study 1	Case study 2	Case study 3
Conception of teacher's role	<ul style="list-style-type: none"> <li>• Director, organizer, translator, program instructor</li> </ul>	<ul style="list-style-type: none"> <li>• Program instructor</li> </ul>	<ul style="list-style-type: none"> <li>• Program instructor</li> </ul>
Views and understanding of teaching and learning: delivery and methods	<ul style="list-style-type: none"> <li>• Communication and interaction</li> <li>• Training format such as role play and simulated talk considered most effective</li> <li>• Participating in English technological training to practice English</li> <li>• Tailor-made training methods suggested</li> </ul>	<ul style="list-style-type: none"> <li>• Combine communicative competence development scenarios with language use in the authentic tasks</li> <li>• Use company's case studies and should protect confidentiality</li> <li>• Classroom-based spontaneous oral practice/conversation practice preferred</li> </ul>	<ul style="list-style-type: none"> <li>• Role play often used</li> <li>• Prefer classroom-based spontaneous oral practice/conversation practice</li> <li>• Suggest using case studies</li> </ul>
Students' learning styles, learning strategy, personality, motivation, occupational specialization and work experience	<ul style="list-style-type: none"> <li>• Trainees' different learning styles, learning strategy, personality and occupational specialization</li> <li>• Motivated to improve job quality and productivity</li> <li>• No job change and salary increase</li> </ul>	<ul style="list-style-type: none"> <li>• Trainees' different learning styles, learning strategy, personality and occupational specialization</li> <li>• Motivated because of relevance to job, increased productivity and reduction in loss due to misunderstanding</li> <li>• Salary increase and job change realized</li> </ul>	<ul style="list-style-type: none"> <li>• Trainees' different learning styles, learning strategy, personality and occupational specialization</li> <li>• The motivated to have more effective communication with HQ, for better work</li> <li>• Job change and salary increase</li> </ul>
Assessment requirements	<ul style="list-style-type: none"> <li>• Self-assessments with four training participants and the average score for overall language aptitude at 2 out of 4</li> </ul>	<ul style="list-style-type: none"> <li>• 25 out of 30 trainees with pre-course assessment 4 participants partially completed the end-of-course assessment</li> <li>• Self-assessments conducted with four training participants and the average score for overall language aptitude at 2.25 out of 4</li> </ul>	<ul style="list-style-type: none"> <li>• Self-assessments conducted with five training participants and the average score for overall language aptitude at 2.2 out of 4</li> </ul>
Climate and environment	<ul style="list-style-type: none"> <li>• The working language in Chinese</li> <li>• On-the-job English communication practice</li> </ul>	<ul style="list-style-type: none"> <li>• Benefit a lot from on-the-job professional communicative competence development</li> </ul>	<ul style="list-style-type: none"> <li>• Working language in Chinese</li> <li>• Multimedia method as a good way of learning English</li> </ul>

Resources and support	<ul style="list-style-type: none"> <li>• Mixture of classroom-based training program and online training model preferred</li> <li>• English use as the best teacher</li> <li>• Prefer to be thrown in an English environment</li> </ul>	<ul style="list-style-type: none"> <li>• A concentrated online platform for employees to develop professional communication ability</li> <li>• A distance education model suggested</li> </ul>	<ul style="list-style-type: none"> <li>• Professional improvement and career advancement through on-the-job communication</li> </ul>
Human resources training and development policy	<ul style="list-style-type: none"> <li>• Take any motivating schemes for employees to learn English for example, favorable reimbursement policy</li> <li>• Favorable recruitment policy relevant to English skills</li> <li>• English becoming an important skill to work in company L</li> </ul>	<ul style="list-style-type: none"> <li>• Different positions with different English communication requirements, certified and assessed by various testing systems</li> <li>• Will not link salary with English skill, but encourage employees to learn English continuously</li> </ul>	<ul style="list-style-type: none"> <li>• No human resources training and development policy readily available</li> </ul>

### *Workplace EOP training program implementation*

In the program implementation stage of workplace *EOP* training, the three case studies have also generated differentiated findings in the evaluation process. The trainer has played different roles in various corporate programs, of director, organizer, translator and program instructor. Case study 1, 2, 3 have been delivered using different approaches including role play, simulated talk, conversations and scenarios. The participants suggested that more case studies from real-world business would increase the authenticity and effectiveness of the program content. Students have varied learning style, learning strategy, personality, occupational specialization and work experiences. They are motivated to learn *EOP* because it can increase their job performance. Workplace *EOP* training effectiveness is thereby performance oriented.

One of the drawbacks which may affect the evaluation of training effectiveness is the lack of pre and post course assessment records in case study 1 and case study 3. In case study 2, pre-course and partial post-course assessment records were provided to ensure that the trainer understood whether the training program had addressed the needs. Moreover, self-assessment results added extra information to indicate the language aptitude more than one year after the training program completion which is valuable for the study.

### *Vocational context*

In the vocational context, another big constraint to international English business communicative competence development is the climate and environment. In the environments of case study 1 and case study 3, the working language is Chinese, which makes it more difficult for the participants to get on-the-job business English communication practice.

Both the trainer and the workplace can provide resources and support, such as establishing an online platform for workplace English learning, creating an English learning environment and offering on-the-job learning support. Moreover, case study 1 and case study 2 have favorable human resources training and development policies, in reimbursement, recruitment and English certification for different positions, though they are not complete enough to cover every aspect of communicative competence development. In case study 3, the absence of effective HR policies may have added to difficulties in workplace *EOP* program implementation. However, this was compensated by frequent corporate English training activities throughout years.

## 10.2. Discussion of stage one and stage two study to answer research questions

In comparison, stage one of the empirical study also provided constructive information on developing workplace English training models in Hong Kong and mainland China, laying a solid foundation for the stage two analysis of the effectiveness of workplace *EOP* training in case study 1, 2, 3 in Wuxi, mainland China. In this section, the findings from the case studies are compared and contrasted with the stage one findings from different workplaces in the Chinese context.

*How effective are EOP training programs in preparing employees for global business communication in the workplace?*

*Short-term training program effectiveness*

*Intended Outcome*

In case study 1, the intended outcomes were measured by the completion of the training goal. In case study 2 and case study 3, HR made statistical calculation of the level of English proficiency the training participants achieved. Case study 2 tried to align its results with Business English Certificate preliminary level.

However, intended outcomes of case study 1 and case study 3 were not aligned entirely with a qualification framework such as Business English certificate preliminary, which may have lowered the standard of program provision.

Currently in Hong Kong, the intended student learning outcomes for communication or English language in the workplace have been clearly spelt out in the Hong Kong Qualifications Framework (2012) with “Generic Competence”, with different levels and units of competency. The materials and assessment are pegged into the qualifications framework. Helen, of public training provider E, spoke with “*management and potential trainees*” in the company, after which the assessment was made, with the focus on competencies in the qualifications framework. This measure could ensure the quality and standard of workplace *EOP* program provision in Hong Kong.

Generally, in mainland China, the intended student learning outcomes are measured by the employers rather than built into the curriculum within the qualifications framework. As Jerry, director of company K observed as an employer, after the training, employees “*improved their English, had more understanding of the knowledge and could work more effectively*”. Thus, the program standards in mainland China are more linked with job performance in specific companies.

### *Learner self-assessment results*

There are variations in the learning aptitude. In the case studies, the self-assessment results were 2 to 2.5 on average, ranging from lower-intermediate to upper intermediate. This is similar to the self-assessment results in Hong Kong companies. For example in Paul's company, most of the employees had 2.5-3 *EOP* proficiency (upper intermediate); 3 in document writing and 2.5-3 in oral communication. In other companies, the learning aptitudes in workplace *EOP* vary.

The five working adults also self-assessed their language aptitude, written and oral communication abilities in a 1 – 4 rating scale, representing the proficiency levels from beginner, lower intermediate, upper intermediate to advanced (see **Appendix 7**). The results are listed in **Table A 22**.

**Table A 22 Self-assessment results for working adults**

	N	Minimum	Maximum	Mean	Std. Deviation
Language aptitude self-assessment	5	2	3	2.40	.548
Writing	5	2	3	2.40	.548
Oral communication	5	2	3	2.40	.548
Valid N (listwise)	5				

The average language aptitude for the five working adults with different backgrounds was 2, comparable to the case study findings. Steve and Milton scored highest in overall language aptitude self-assessment, writing and oral

communication ability. They are successful examples of workplace English learning, although Milton held an undergraduate degree in English language and literature.

### *Unintended outcomes*

In case studies, training participants reaped different kinds of unintended outcomes from workplace *EOP* training programs, which are positive and critical to their career growth, soft skills development and organizational development.

In the context of Hong Kong, the two training providers, Helen and Mary, were more practical and specific. The unintended outcomes of workplace English training programs for employees and companies would be job performance oriented. Whether the program can help the employees work better and get more confident is the critical consideration. Helen explained that employers would look at the “*after-training assessment results of their employees, whether they are better equipped with job skills, and whether they are more confident*”. She reiterated that the companies would focus on the business and employers would know “*to a certain extent whether the training program can help the employees*”. Mary reiterated the job performance orientation. After training,



employees can “do their jobs better”. She felt that workplace training should address “*business impact and performance improvement*”.

Henry, an adult English training provider for international organization P summarized that the training participants exhibited “*increased confidence*” after taking the workplace English training programs. In the program context, training participants can use English as much as possible and obtain “*feedback and guidance*” from the trainers, which helps them improve their English performance.

These views were confirmed by Paul, of electricity company H, who stated the unintended outcomes of workplace English training program lied in the enhancement of convenience in business information exchanges on various occasions. He observed that the company training department organized “*various training programs on writing and oral presentations, both within and outside the company*” to enhance the sharing and communication of information.

According to Chris, sales director for multinational company J, companies and employees view training differently. Companies want to make more money and thus see training from a financial perspective. Employees see training from a

personal perspective, as a step towards career advancement. Training programs that include workplace English training was an attraction for employees to enter companies to work.

Input from other workplaces in Hong Kong has expanded and deepened the answers to the research questions. The unintended outcomes of workplace *EOP* training include enhanced business performance, increased confidence, and improvement in the business and the employees' personal development.

#### *Difficulties of workplace English use*

In the case studies, the participants reported that difficulties in English listening, speaking, grammar in writing, professional terminology and colloquial expression in oral communication remained. This was due to the fact that working language was mostly in mandarin Chinese in these workplaces and there were not many opportunities for these training participants to practice English during the periods after program completion.

The same difficulties with workplace English use also occurred in the Hong Kong companies due to insufficient opportunities to practice oral English such as in the case of Paul's company. Paul mentioned that his company had fewer

*“foreign colleagues”* and employees did not have much chance to practice English communication in the workplace. Lack of language environment and motivation to use and practice workplace English continuously could explain the difficulties employees may still encounter in improving their English communicative competence.

In mainland China, in the case of Steve, a production planner for global production planning company L from Germany in mainland China, the difficulties of workplace English use lied in professional and technological terms in particular industry. Steve explained as he has been crossing into the industry with *“technical or production related details”*, he had some difficulties in talking about for instance *“machine accessories”*. Thus, another cause of the difficulties in workplace English communicative competence development has been the industry related terminology. Workplace employees need to acquire professional terminology through reading the business documents or even getting access to the industry-specific discourse or corpora to gain a comprehensive understanding.

### *Long-term program impact on job performance and business operation*

#### *Long-term learning outcomes*

In the case studies, the long-term learning outcomes declined. It may be difficult to measure the impact to the business. This finding was aligned with those of other workplace training programs in Hong Kong and mainland China.

In Hong Kong, training provider Carrie considered it difficult to measure the long-term impact of a 30-hour training program on the business, as “*it is too short*”. She argued: “*the long term impact of the workplace training programs can be measured more probably with an extensive course for lasting for one to two years*”.

In mainland China, former HR director Jerry thought it would take extra time, maybe half a year or one year for employees to be competent in job practice.

#### *Sustainability of learner autonomy*

The participants in the case studies were aware of the importance of persistence and motivation in learning English, and thus enrolled in alternative English training programs and activities in their spare time. The companies in Hong

Kong also thought that the sustainability of learner autonomy depended on personal commitment and motivation.

Trainer Henry indicated that students' remarkable progress depends on "*student inputs*". The students who show significant growth are those who "*come into class, do the homework and pay attention*". Advancement is tied to "*student commitment*". Business manager Frank explained that his company recruited the "*top 75% performers in the society*". These people were "*passionate and committed to the corporate value*" who would try hard. He argued that success depends on "*individual's commitment*". Frank thought: "*if one is passionate about learning the language, they would take every opportunity to do it*". Paul agreed and commented: "*it depends on individual commitment*". His company "*encouraged employees to pursue further English learning to equip themselves*".

However, in mainland China, employees' spare time is usually in the evening, and is thus not dedicated to sustaining workplace English learning. Business officer Cathy explained she had limited spare time after her eight-hour work in the day time and thus would typically "*watch English movies and listen to songs*". She considered "*corporate English training as quite important*".

*International business communication performance*

In the case studies, international business communication performance was measured using international trade results. For businesses to operate internationally, good international business communication performance was indispensable. Workplace *EOP* training program played vital roles in helping to improve the international communication performance.

In Hong Kong's consultancy, Chris thought that courses on such topics as influencing skills in English can improve a sales man's English and influencing skills concurrently, which had a positive impact on the business as well as "*model of mind*". Frank explained the circumstances of a railway operator. International business communication was a critical part of the business. As this railway operator had businesses in different parts of the world, including "*Melbourne, Shenzhen and Beijing*", if the employees could not communicate, their customer would have a problem. Thus, employees' English ability guaranteed "*a better running business*".

In mainland China, better workplace English communicative competence can often enhance work efficiency and enable the business to operate more smoothly such as with more efficient meeting and better customer cooperation, which are necessary for business success. Training organization director Alex

explained the “*work efficiency*” could improve if employees could “*easily and accurately understand and express the meanings*”. Otherwise, there are “*misunderstandings and worse work outcomes*”.

Engineer Fanny talked about her company business communication status quo. She stated that a certain level of English proficiency was a job entrance requirement in her company. In the meetings, notes would be kept and employees’ oral communication performance recorded to improve work efficiency. Production planner Steve summarized: “*If there is a customer, we can better cooperate. Or if there are guests from different countries, we can cooperate better*”. These corporate examples indicate that international business communication performance plays critical roles in corporate operational success and these findings align between stage one study and stage two study.

#### *Skills development for employment and employability*

In case studies, professional communication skills were essential for career success either working as an engineer at company L or in middle management at company Y. Representatives from Hong Kong and mainland China also

indicated the importance of communicative competence in ensuring positive development in the work.

Henry as the trainer for training organization P, stressed that taking the English training courses can make the training participants more “*employable*” and this is “*what every employer wants*”. The Hong Kong companies viewed workplace English communication skills as indispensable for future employment and employability. Frank argued that in the performance management process, language skill was “*one of the things that the company monitors and measures, which is related to future employability*”. Paul linked “*excellent English language skills*” with “*edge on job interviews, as it makes employees more presentable*”.

In mainland China, workplace English communication skills are usually developed based on business needs. Employees can also get promotion from the developed communication skills. Policymaker Zoe added that the company had requirements on “*English and the ability to use in the work*” and organized training based on business needs. Fanny summarized: “*if your English is not good, you cannot get promotion*”.



### *Return on investment*

In the case studies, ROI was not always measured. In workplaces in Hong Kong, ROI calculated from cost-benefit analysis is a measure of the value of workplace *EOP* training and the basis of business' decision on whether the training course should be continued. Frank suggested the use of "*cost-benefit analysis in the development of training courses*", the results of which lead to the decision of course offering. Mary commented that the performance improvement can ensure the "*businesses get value of what it is they funded*".

However, both the training providers and the companies in Hong Kong found it hard to quantify workplace English training programs' contributions to business growth, as the benefits were intangible and some of the programs were too short to be measured from a financial perspective. Helen commented that although ROI was one way to assess the effectiveness of language training program, companies may be reluctant to use it and more often it is a "*general improvement of competencies*". Chris explained: "*it depends on the types of training programs to measure the return on investment ratio*". Paul further commented:

*The contribution of language training programs to business growth is hard to be quantified. It is intangible benefits for the contribution of communicative competence development, unlike some physical benefits.*

(Paul)

In mainland China, it is often difficult to measure the ROI ratio for workplace English training programs. Jerry thought it was not easy to measure the ROI. But “*if employee can have better English, they can have better understanding about products and customers. And they get more orders*”. Steve explained: “*it is behind and invisible. There is no method to see directly through 1 or 100%*”. Findings in stage one study actually complement the findings in stage two case studies and offer reasons why ROI is difficult to be measured for workplace EOP training.

#### *Sustainable livelihoods*

In the case studies, sustainable livelihoods were not all measured. In case study 1, it was seen as a way to reduce poverty and increase international economic exchanges.

The training providers and employers in Hong Kong in this study agreed that workplace English training programs can ensure good job performance, which supports sustainable livelihoods. It is also a way to maintain Hong Kong's competitiveness as a good international business environment. Mary indicated that employees were given opportunities to perform well on the job, which ensured the *"livelihoods of employees in the workplace because they can keep their jobs"*. Mary thought that a *"fundamental aim of workplace communication"* was for *"people to retain their jobs and get better at their jobs"*. Helen and Paul explained that as Hong Kong is an international city and for Hong Kong to *"remain competitive"*, Hong Kong employees need to *"further improve the English skills"* and *"add advantage to the competitiveness"*. Chris further added that if the outside world recognized that English could be used in Hong Kong, more people would come to the region and this benefited the community.

In mainland China, training organization director Alex extended the meaning of workplace English training to address the needs of comprehensive national and human development.

Stage one study findings from different workplaces in Hong Kong and mainland China help to answer the Research Question 1 more comprehensively,

with input of professional insight. Stage one study aligned *intended learning outcomes* with qualifications framework, which has been embedded in the curriculum. The learners' self-assessment results have provided benchmarks for learner performance in workplace *EOP* training case programs. In stage one study, there was also evidence of the difficulties of measuring *long-term learning outcomes* and *ROI* for *EOP* programs in the workplace. Stage one study expanded the answers to Research Question 1 in the findings of *unintended learning outcomes, difficulties of workplace English use, sustainability of learner autonomy, skills development for employment and employability, international business communication performance and sustainable livelihoods*.

*What factors contribute to and hinder the effectiveness of EOP training programs in the workplace?*

*Workplace EOP training program design*

*Training needs analysis*

In the case studies, training needs analysis was conducted through surveys and face-to-face interviews with HR managers. In other Hong Kong workplace *EOP*

programs, language requirements were gathered to develop more targeted curriculum.

*Vocational English curriculum was developed before the course commence. Needs analysis was conducted by meeting with workplace employers or employees. Samples of workplace communication materials were collected to understand the genuine needs of vocational English training. Teacher would sometimes stay in the company for 1 – 2 days to observe the day-to-day business English communication. (Carrie)*

Helen further explained that the focus of training needs analysis was to identify the “*real language use in the workplace and to equip students with the competencies*”. The training program designer, for instance, “*looked at the English requirements in terms of the language skills needed for the hotel and catering industry. For the hotel industry, they need quite a lot of spoken English*”. The training provider may also need to talk to the HR person and the employee to identify the English language learning needs, such as the “*customer service skills or communication skills in a particular setting*”. The result of training needs analysis is a “*program proposal*”, the content of which varied based on job needs. These practices indicated the importance of

understanding the language features in the workplaces before a training program is designed.

Compared to the practices in Hong Kong, in the industrial companies in mainland China, the workplace English training needs analyses appeared to be more concerned with investigating departmental training needs and making decisions about in-house training and training outsourcing by utilizing external workplace English training expertise. The comprehensive information collected in the training needs analysis stage also includes employees' English proficiency evaluation results, which then inform the workplace English curriculum development.

#### *Course content and material*

In the case studies, course materials were considered adequate. The introduction of business writing samples and templates proved particularly useful when applied to the working context.

In the Hong Kong workplace *EOP* training programs, the course materials are sometimes based on authentic texts collected directly from the workplace, rather than on a single textbook. Mary elaborated that the selection of materials

depended on the types of courses. “*Authentic materials*” would be collected from the workplaces in the forms of “*spoken or written text*” with an understanding of the business activities. Textbook suited a more “*general course*”. It was “*essential*” to incorporate work scenarios into the training.

Carrie also explained that there would be no single textbook, as the materials “*vary from learning notes to handouts, prepared by professional material writer. The materials are also based on workplace samples*”. Helen added that “*materials would be tailored to the setting*”. Helen provided the example of “*aircraft maintenance menu, with the language forms, grammar, and vocabulary sorted out to understand the potential learning problem so as to provide relevant teaching and learning strategy to support the English language learning*”. Helen considered the “*relevance of materials and the level of attainment as both important*”.

In the mainland China’s programs, Jerry explained that besides the “*Cambridge Business English textbook, the teacher always provided other materials from every aspect of English*”. These materials were drawn from “*English newspaper or magazine stories*”. Before the lesson started, there would be some stories or news for a short discussion for 20 minutes. The formal textbook lesson then followed. In this example of food business English training, authentic materials

drawn from media resources were used. It implies the workplace *EOP* training content and materials should reflect the authentic workplace English use and solve real-world problems.

### *Class time*

In the three case studies, the course length ranged from 18 to 48 hours. They are relatively short courses. The course time was arranged in the evening or on the weekend. The evening time for workplace *EOP* training programs sometimes caused fatigue among the training participants.

In the actual practice of implementing workplace *EOP* programs in the Hong Kong context, Henry of international organization P indicated that the program was mostly also short, ranging from the “*workshop style of 12 hours*” to longer courses of “*24 hours to 46 hours*”. Henry also indicated that it had become challenging to arrange an appropriate length of time for the training as the companies were not willing to invest a long enough period. They were more willing to support a 12-hour shorter course on Sundays than a 40-hour longer course in the afternoons. However, Henry thought the shorter courses could hardly see remarkable improvement from the training participants. This class



time arrangement with proper course length for the training program could be a barrier to training effectiveness.

### *Class size*

In the case studies, the class size ranged from 4 to 30. A big class with mixed proficiency sometimes can pose challenges to the trainer and hinder training effectiveness. One-on-one teaching format is preferred.

In the program implementation context of Hong Kong, Henry indicated that the “*maximum class size is 16 and an optimum number is between 8 and 12*”. He found that “*the bigger the class, the lower level the employee. The higher up in the company, the fewer people in the class*”. He also stressed that “*one-on-one format*” is not necessarily the best as training participants sometimes feel lonely and teachers are not “*as alert to give feedback*”. The results imply that a proper arrangement of class size facilitates training effectiveness. An inappropriate arrangement of class size reduces training effectiveness.

### *Teacher's qualifications*

Trainer's qualifications in the case studies are considered relevant. Training provider Mary commented that “*workplace English training is so challenging*”, as workplace English trainers need to “*transfer from one industry to another*” and need to equip themselves with “*a broad repertoire of skills in curriculum consultancy and assessment*”.

Henry's organization organized continuous teacher training to ensure that trainers had the necessary skill to cope with the workplace English classroom situation. The topic could be “*managing multi-level classroom*”, in which trainers were taught to manage the class through the proper grouping of students and the assignment of tasks with corresponding levels of difficulty.

In the mainland China context, Alex mentioned that to train English well, trainer needed to have not only “*strong English ability*” but also teaching technique. Good teachers need to study “*education and psychology*” and should be “*able to do a lot of teaching design and planning*”.

In this context, trainer's qualifications are multi-dimensional and trainers are expected to perform well in a multi-task environment.

### *Workplace EOP training program implementation*

#### *Conception of teacher's role*

In the case studies, the trainer played multiple roles. In Hong Kong's companies, workplace *EOP* trainer could assist business communication activities in numerous ways, as in the case of Paul in the electricity industry, in which trainers not only taught courses but also played the role of business communication consultant helping with editing the company's published materials.

From the perspective of training providers in Hong Kong, the trainers were solely considered program instructors. There were even professional writers responsible for material compilation, as in Carrie's case. However, Henry indicated a mixture of roles includes instructor, facilitator and consultant in serving corporate client's business communication needs.

#### *Views and understanding of teaching and learning: delivery and methods*

In the case studies, communicative competence development teaching methods were used, such as role play and simulated talk. It was recommended that the

training methods be tailored to cater to individual needs and the participants also suggested bringing in more authentic case studies.

Findings in other workplaces in Hong Kong and mainland China in this study align with those in the case studies. In Hong Kong, Carrie indicated the workplace *EOP* training programs were “*task-based and use simulation a lot, so that the language taught in the workplace English training programs are the real language used in the workplace. In speaking classes, presentations will be used. In teaching socializing, role plays and simulation will be used*”.

Chris also commented that for case studies trainers bring to the training, they should be “*specific to business*”. For one “*training program in transport*”, Chris raised the example cases of “*British Airway or Air France*”, which would be “*more useful than HSBC based on the principle of relevance to business needs*”.

In *EOP* programs in the workplaces of mainland China, companies also use role play and case studies. Jerry indicated in “*oral communication sessions*”, student could have “*role plays of telephone conversations on products, story-telling*”, followed by other students’ listening and commenting. Steve also advised

English training to be “*experiential*” with “*case discussion and more authentic cases*”.

*Students’ workplace learning style, learning strategies, motivation, and personality*

In the case studies, students’ learning style, learning strategies, personality and learning aptitude varied. Their motivation has been to increase job productivity and improve job performance. Some have achieved salary increase and job change.

In Hong Kong’s workplaces, there is no set method of workplace learning. It depends on the individual motivation and commitment. From the training provider perspective, Mary confirmed that the workplace, the methods of learning were not fixed and unchanged. It depended on learners’ learning objectives in a particular period of time.

In the companies, Paul stated that his company organized “*all kinds of activities*”, ranging from “*English language courses to functional skill courses*”.

In their spare time, employees can learn English through “*watching TV with English channels, reading technical materials, visiting the website and reading*

*books*". Frank indicated two parallel strategies for workforce training and development. One was for the training of technical skills and competence for a particular job. The other was for personal development, such as by attending courses at master level or at the Hong Kong Institute of Engineering.

In mainland China, the five written surveys (see **Appendix 7**) filled out by Steve, Fanny, Cathy, Milton and Nicole have provided objective supplementary information related to their working profiles (see **Table A 23**) use of second language learning strategy (see **Table A 24**) and working and studying style (see **Table A 25**).

**Table A 23 Working adult profiles**

Name	Steve	Fanny	Cathy	Milton	Nicole
Company	Global Germany-based Company L in Production Planning	Global US-based Company M in Computer Hardware Production	Global China-based Company N in Home Appliance	Private Trading China-based Company X in Machinery	Private Trading China-based Company X in Machinery
Department	Production	Production	International Department	International Trade	International Trade
Position	Production planning	Engineer	Business Officer	Manager/Company Owner	International Trade Specialist
Education qualification	Bachelor in English (Continuing Education)	Bachelor in English (Continuing Education)	Bachelor in English	Bachelor in English	Bachelor in English
Work experience	7 years	14~16 years	2~3 years	0~3 years	0~3 years
Salary increase	100%	n/a	According to the work experiences	n/a	n/a
Job change/promotion	Change job/industry	n/a	n/a	n/a	n/a
Motivation of learning workplace English	Useful, personal preference	Working with partners	The work is to communicate with customers. Language is important.	Personal preference	Comparative advantage in English language learning

**Table A 24 SILL survey results**

Strategy	Steve	Fanny	Cathy	Milton	Nicole
Remembering more effectively	Usually Used	Sometimes Used	Usually Used	Sometimes Used	Sometimes Used
Using all your mental processes	Usually Used	Sometimes Used	Usually Used	Sometimes Used	Sometimes Used
Compensating for missing knowledge	Usually Used	Sometimes Used	Usually Used	Usually Used	Sometimes Used
Organizing and evaluating your learning	Usually Used	Sometimes Used	Usually Used	Sometimes Used	Sometimes Used
Managing your emotions	Generally not Used	Sometimes Used	Sometimes Used	Sometimes Used	Sometimes Used
Learning with others	Sometimes Used	Generally not Used	Sometimes Used	Sometimes Used	Sometimes Used
Overall use of strategy	Usually used	Sometimes Used	Usually Used	Sometimes Used	Sometimes Used

**Table A 25 SAS survey results**

Style	Steve	Fanny	Cathy	Milton	Nicole
Activity 1: How I use my physical senses to study or work	Hands-on	Auditory	Visual	Visual and hands-on	Visual
Activity 2: How I deal with other people	Introverted	Extroverted, Introverted	Extroverted	Extroverted	Extroverted, Introverted
Activity 3: How I handle possibilities	Intuitive, concrete-sequential	Intuitive, concrete-sequential	Intuitive, concrete-sequential	Intuitive, concrete-sequential	Intuitive, concrete-sequential
Activity 4: How I approach tasks	Closure oriented, open	Closure oriented	Closure oriented	Closure oriented	Closure oriented
Activity 5: How I deal with ideas	Global	Global	Global and analytical	Global	Analytical



The SILL survey results have shown that both Steve and Cathy have high frequency of second language learning strategy use, particularly in memory strategies, cognitive strategies, compensation strategies and meta-cognitive strategies. Steve and Cathy have medium frequency use of affective strategy and social strategy. Fanny, Milton and Nicole have medium frequency in the use of second language learning strategy. Milton has high use of compensation strategy (Oxford, 1989a).

The work and study styles of working adults have also varied. In using physical senses to study and work, Steve is hands on. Fanny is auditory. Cathy and Nicole are visual. Milton is both visual and hands-on. In dealing with people, Steve is introverted. Cathy and Milton are extroverted while Fanny and Nicole are both extroverted and introverted. In handling possibilities, all of the working adults are intuitive and concrete-sequential. In approaching tasks, Steve is closure-oriented and open. Fanny, Cathy, Milton and Nicole are closure oriented. In dealing with ideas, Steve, Fanny and Milton are global. Cathy is global and analytical while Nicole is analytical.

After undergraduate-level English studies, regarding questions of workplace English learning strategy and style, it can be found that to further improve their English speaking skills, Steve mostly relies on *self-study*. Fanny largely

improves through *workplace communication with expatriate colleagues*. Cathy mainly applies her English skills in her daily work and actively participates in company English training delivered by foreign trainers to understand Eastern and Western culture. Milton improves his English through *formal English communication* while Nicole relies on *self-study*. These findings have added further information for understanding working adults' learning strategies and styles.

Steve, in particular, stated that through workplace English skill improvement, he has been able to obtain 100% salary increase by changing his job and industry. Fanny, Cathy, Milton and Nicole have maintained steady performance in their English communication jobs.

Michael, from Company N, is comparable with working adult Steve, who also achieved excellence in workplace English communicative competence development, received a salary increase, changed his job and enjoyed international career success. Both Steve and Michael frequently used second language learning strategies, and thus served as success examples of *EOP* training in the workplace.

### *Assessment requirements*

One of the drawbacks of the case studies was the incompleteness of the pre- and post-course assessment records, which may hinder the assessment of program effectiveness. Findings in other workplaces in Hong Kong and mainland China have indicated the importance of assessments in various forms, through end-of-course test, performance review by supervisors or the training manager etc.

In Hong Kong, Susan indicated the use of “*performance indicators*” for evaluating the training programs, such as “*attendance for the trainees*”. A survey would be conducted directly after the workplace English course ended. The survey questions included the “*usefulness of the course*”. Susan found “*long-term learning outcomes*” measured with “*placement-tied courses*” rather than “*workplace language courses*”. A special committee was in charge of the quality assurance process, to check the “*facilities, equipment and student attendance*”. Susan mentioned that “*the course standards were aligned with Hong Kong Qualifications Framework of SAR Government as most of the courses have been officially accredited*”.

At the transport company, Frank also explained that evaluation would normally come “*at the end of the training session and attendance is not the only factor for program evaluation*”. For assessment, Frank mentioned “*some measures of having been able to communicate in the class*” to assess the “*gap between how the participants have been able to communicate and the training administrator’s belief about the training participants’ performance*”. Frank observed that the evaluation methods included “discussion, reading papers and sitting in presentations”.

In the *EOP* programs in workplaces in mainland China, almost all of the training programs would end with a test. Steve explained that the HR department would ask the training organization to “*give trainees some test, paper or oral tests*”. The “*boss would also evaluate the English performance*”. Cathy agreed, reporting that learners would be evaluated through “*test results and performance in English activities such as talent show or English speech, organized by the training organization*”. Jerry also elaborated that the test score was only “*one part of performance evaluation*”.

### *Vocational context*

### *Climate and environment*

In the case studies, the working language was Chinese which proved to be a barrier to workplace English skills development. The participants improved their workplace English communicative competence through on-the-job communication activities.

In contrast, in some workplaces in Hong Kong, the working language is English and resources are provided for the construction of an English learning environment. Chris indicated the establishment of English corners and the provision of books and novels in the pantry for people to read.

In another mainland China workplace, even if the working language was not necessarily 100% English, there was the climate and environment for developing workplace English communicative competence. Fanny explained her company organized “*Toastmaster regularly every week with 10 people*” and “*English corner*” during the lunch break for employees to improve their English speech and listening skills. The company also had many “*expatriates from*

*different countries*”. Fanny’s English improved the most from chatting with an expatriate from Thailand.

### *Resources and support*

In the case studies, resources and support had better be provided through an online training platform to create an English learning environment. A blended model that mixed classroom based training and E-learning was preferred. However, the E-learning platform had not yet been constructed in the case studies.

In some workplaces in Hong Kong and mainland China, there have already been blended modes providing learning resources and support through face-to-face instruction and online delivery. Paul in the electricity company stated that the training can be organized both onsite and offsite. His company had a training center, where workshops were often organized. Paul stressed: *“person-to-person/one-to-one tutorial is the most effective training model. If training takes place in the classroom, the class size is usually about 20 for face-to-face instruction. There are also online courses with some software for employees to enroll. The training model is a blended mode”*. Jerry described an online learning platform that was developed by Headquarter HR, for employees

around the world to “*assess their English from the Internet and choose the starting point as the E-learning system suggests*”. The E-learning program worked particularly well with “*sales people*” who preferred the flexibility in the location and time of learning.

#### *Human resources training and development policy*

In the case studies, the companies used various motivating schemes, such as the reimbursement and recruitment policies, to encourage the participants to learn English on the job. There was no direct linkage between HR policy and salary. Chris from the HR consultancy in Hong Kong also doubted about the linkage of salary increase with passing an English course.

In other workplaces in Hong Kong, there are government funds to subsidize the workplace *EOP* training programs. Helen explained government funding such as CEF was used to “*run vocational English courses for different levels and different language skills, for the general public as well as for the specific industry sector*”.

Workplaces in mainland China see English skills as an advantage that increases the possibility of job promotion. Fanny explained that English ability was tied

to the potential for promotion. For people with engineering backgrounds, good English could ensure job promotion. English training was provided to those with potential and the department head reviewed employees' English training performance and learning outcomes.

Compared to case studies in stage two, the stage one findings demonstrate that factors of program design (*training needs analysis, course content and material, teacher's qualification*), program implementation (*conception of teacher's role, Views and understanding of teaching and learning: delivery and methods, knowledge of students' learning styles, learning strategy, personality, motivation, occupational specialization and work experience, assessment requirements*) and vocational context (*resources and support, human resources training and development policy*) have contributed to the effectiveness of *EOP* programs in the workplace. The appropriate arrangement of *class time* and *class size* also contributes to the training effectiveness, but it can be challenging as the actual arrangement of *class time* and *class size* may reduce the training effectiveness. *Climate and environment* vary in different workplaces. For companies with English as a working language, climate and environment contribute to the effectiveness of *EOP* programs in the workplace. For companies with Chinese (Putonghua or Cantonese) as a working language,



climate and environment may hinder the effectiveness of *EOP* programs in the workplace.

### 10.3. Discussion with existing literature

*How effective are EOP training programs in preparing employees for global business communication in the workplace?*

In the second language curriculum, program evaluation is defined as “the systematic collection and analysis of all relevant information necessary to promote the improvement of a curriculum, and assess its effectiveness and efficiency, as well as the participants’ attitudes within the context of the particular institutions involved” (Brown, 1989, p. 235). The process of evaluation addresses such effective questions as “How effective are the present materials in meeting the needs of the students as expressed in the objectives which are measured by the tests?” and “How effective is the teaching in the program” (Brown, 1989, p. 238). In the field of *ESP*, course effectiveness is usually measured by “during or end-of-course evaluation using questionnaires or interviews eliciting end users’, students’ and teachers’ perceptions of the effectiveness of the course”. In addition, the evaluation of *ESP* and *EGP* courses differs in “evaluating perceptions of effectiveness and assessing

learning not only at the end of the *ESP* course but also in the light of subsequent experiences in the target field” (Basturkmen, 2010, p. 65). These definition and understanding of evaluation apply to *EOP* programs in the workplace in this study, which collects and analyzes the relevant comprehensive information and assesses both the program effectiveness and impact on the workplace and the individuals participating in the programs during the periods after the program ends.

For the issue of training effectiveness of workplace literacy, language and numeracy (LLN) skills, Benseman (2012) cited Wolf and Evans’ U.K. study (2009 in Benseman, 2012), which found “a very small average gain in reading skills” one year and two years after the “30-hour long training courses”. This U.K. program worked particularly well with *ESL* learners, who experienced significant gains compared to native learners (p. 94). Benseman (2012) summarized that in the area of LLN skills training, there has been some research recognizing the value of workplace programs and some opposing their usefulness. Benseman’s (2012) New Zealand context study reported that LLN skills development program received both positive and negative comments from training participants regarding such program effectiveness in terms of increase in “job performance, confidence and self-satisfaction”, changes in LLN skills and changes in workplace practices (p. 97). Gallo (2004) stated the evaluation of workplace literacy programs is essential to show the “value of the

program” to program stakeholders by not only standard assessment but also meaningful impact measurement. The types of measurements include “post tests, learner portfolios, supervisor surveys, learner questionnaires etc.” (p. 119). There can be improvement of literacy skills and intangible benefits such as increased “confidence, morale and self-esteem” (p. 125). Moreover, the “transfer of learning” to the workplace context to increase productivity, bring changes to the workplace environment and employees’ livelihoods are key measurements for evaluating the effectiveness of the literacy programs.

This study is based in the Chinese context. It addresses the effectiveness of *EOP* programs in preparing employees for global business communication in the workplace by collecting comprehensive and relevant information through the instruments of qualitative interviews with 17 training program representatives in Hong Kong and mainland China, needs assessment surveys, post-course qualitative interviews, business communication document study, participant observation and course assessment in three complete workplace *EOP* program case studies in mainland China. The effectiveness issue is considered from both short-term and long-term perspectives. The study finds that the three workplace *EOP* cases in the mainland China context exhibit immediate effectiveness, such as the engineers’ success in passing their machinery training certification in the U.S., and gradual improvement, though

the intended outcomes should have been aligned more closely and completely with international test benchmarks, as the practice in other workplace *EOP* programs in Hong Kong has demonstrated. The unintended outcomes found in the qualitative interviews and case studies are similar to those in the previous studies, such as increased confidence, motivation to continue learning English in the workplace autonomously, career development, professional ability improvement and teamwork. At present, there are still difficulties in workplace English use in areas such as listening, speaking and writing in the case studies. The training participants in the case studies sustained learner autonomy through on-the-job communication practice, reduced miscommunication, increased productivity and improved international business communication performance. The sustainability of learner autonomy largely depends on individual commitment to the learning process, as found in the qualitative interviews in Hong Kong. The case studies' training participants and company owners all agreed that workplace *EOP* programs helped them develop skills for employability. This has also helped to reduce poverty, promote regional economic development and sustainable livelihoods. In addition, workplace *EOP* training programs are especially important to ensure city's international competitiveness, as summarized by participants in the qualitative interviews in Hong Kong and mainland China. This study has generated findings on the training effectiveness of workplace *EOP* training programs in the Chinese

context that are similar to the findings of previous studies in different industrial and cultural contexts. For example, Kim (2008, p. 19) cited studies which used groups in training to enhance “productivity, cost-efficiency, job satisfaction, and employee motivation”. Kim (2008) is “positive about the benefits of *ESP* programs” far outweighing the costs and input. The researcher for this study also agrees that there are often different kinds of benefits from workplace *EOP* training programs in these Chinese contexts.

However, it may be difficult to attribute considerable progress to workplace *EOP* programs after the short-term courses, which ranged from 18 hours in case study 1, 48 hours in case study 2 to 32 hours in case study 3. The workplace program stakeholders in other companies in Hong Kong and mainland China hold the same views. As Burt and Saccomano (1995) suggested, “it is unlikely that a workplace *ESL* class of 40- 60 hours will turn participants with low-level English skills into fluent speakers of English”. It is important to “realize that *ESL* workplace programs may not provide enough practice time to accomplish substantial progress in English language proficiency” (p. 3).

Moreover, companies are reluctant to measure workplace *EOP* program’s ROI rates, as there are many variables which may influence the financial performance. This has been interpreted by Rivera (2010) in the U.S., who found that “workplace learning investment, whether in total expenditures or amount of

hours devoted to various learning content areas, were not to be significantly associated with most financial outcomes”. The U.S.-based study found an “elusive link between workplace learning investment and business performance”. Instruments are being developed in Australia to apply the measurement tools for ROI on workplace English language and literacy programs according to the most recent study projects (ACER, 2013). The 2013 Global English BEI report spotted “real return on investment” after the company’s offering of business English training programs, as the working hours have been saved by “more than two per week” (Global English, 2013, p. 7). It implies that the ROI of workplace *EOP* training programs could be measured by different indicators.

*What factors contribute to and hinder the effectiveness of EOP training programs in the workplace?*

The cycle of program evaluation is integrated into the curriculum and examines the process of “needs analysis, objectives, testing, materials and teaching” (Brown, 1989, p. 235). Benseman (2012) found that the “characteristics of effective courses” included “experienced tutors/providers, tutors with LLN qualifications, integrating training into long-term company planning, courses run in work time, teaching content was related to participants’ specific learning

needs based on learning needs analyses and their work and personal needs and interests, participants with high motivation and a sense of commitment, and consistent attendance at teaching sessions” (p. 101). In the workplace literacy programs, success factors were indicated in Mikulecky and Lloyd (1995) as benchmarks for future programs. The related indicators to *EOP* programs in the workplace included “active involvement by major stakeholders (management, employee organization, instructors and learners), a custom-designed curriculum with basic skill training instruction and workplace applications and materials, addressing individual learning needs, provisions of incentives for participation such as funding assistance, paid tuition, enhanced productivity and promotion and rigorous evaluation including assessment of worker gains in job-related abilities” (p. 17).

In the Chinese context, this study identified factors which may contribute to and hinder the effectiveness of *EOP* training in the workplace. It looks at program design and program implementation stages and collects both quantitative and qualitative information on factors influencing the design and implementation process in the process verified in previous studies.

#### *Factors facilitating effective program design*

- *Training needs analysis* collects comprehensive information before the program begins through multiple instruments, such as written assessment, surveys or interviews. To contribute to the effectiveness of workplace *EOP* training, Dudley-Evans and St John (1998) suggests collecting information relevant to “professional information about the learners, personal information about the learners, English language information, the learner’s lacks, language learning information, professional communication information through linguistic analysis, discourse analysis and genre analysis, and information about how the course will be run” before the course commences (p. 125). Belfiore and Burnaby (1995) indicated that the needs analysis procedures would include “interview with sponsors and learners” to gather “company details, learner information and the communication diagrams”, “observation and language assessment” for comprehensive understanding of the workplace context (p. 37). However, in case study 1 and case study 3, limited information is collected during the training needs analysis stage through only face-to-face talks with company decision-makers. Training needs analysis as that in case study 2 should be more thorough to provide comprehensive information for the design of the training programs. Training needs analysis in other programs in Hong



Kong in this study has followed a systematic information gathering process as important foundation for course design.

- The *course content and material* in the case studies rely on 2-3 ready-made textbooks, supplemented by authentic materials, case studies and professional vocabulary from the workplaces. Some programs in Hong Kong and mainland China in this study have a bank of materials to draw on, which are diverse and tailored to business specific needs while others only rely on the materials compiled by the trainers which may not be adequate to address the job needs. For further improvement, the *ESP* literature suggests the use of authentic materials based on needs analysis and the investigation of specialist discourse (Basturkmen, 2010). Belfiore and Burnaby (1995) summarized that the materials used in the workplace English programs should include “authentic materials drawn from the workplace, published materials and learner’s contribution related to problems in the workplace and learners’ oral and written narration” (p. 79). Harding (2007) also encouraged the “use of contexts, texts, and situation from the students’ subject area, exploitation of authentic materials, making the tasks and text authentic” (p. 10). However, Kim (2008) indicated the difficulty of creating *ESP* learning materials by trainers for each lesson. *ESP* trainers can cooperate with the learners to modify the ready-made materials, use authentic materials from the learners’ workplace and

evaluate the pre-designed materials. In addition Vitello (2013) indicated that in order to “customize the materials to company’s operation, products and services”, trainers need to “collaborate with key staff from different departments and learn about the company industry” to be more effective in providing language support programs (p. 3).

- In case studies, the *class size* ranges from 4, 12 to 30 group. In the qualitative interview, it has been found that the one-on-one group format is the most efficient, but may be tiring. Pair-work or groups of 8 - 12 people are considered optimum by a professional trainer in this study.
- As for *teacher’s qualifications*, course providers/tutors should be experienced and have relevant qualifications for workplace *EOP* training, which were also indicated in the findings in Benseman (2012) and Lockwood (2002). However participants in the study have also indicated the challenges of being workplace *EOP* trainers, as they should be ready with different kinds of backgrounds, i.e. both language and business and personal qualities. Continuous professional teacher training has been implemented in one organization in this study.

### *Factors hindering effective program design*

- The *class time* is preferably during working hours, mentioned in the study of Benseman (2012) or on the weekend in the daytime. Poor class time arrangement can reduce the program effectiveness. Previous studies have found that significantly short courses were unlikely to have remarkable effects on the participants' English proficiency, which is confirmed by this study.

### *Factors facilitating effective program implementation*

- For the *conception of teacher's role*, teachers in workplace *EOP* programs play multiple roles including director, organizer, translator, program instructor, facilitator and consultant. Lockwood's (2002) study also indicated that workplace trainers are multi-skilled, playing numerous roles such as "consultant, administrator, marketer, curriculum developer, researcher and intercultural trainer" (p. 340). Harding's (2007) summarized trainer's role as "course designer, material provider, collaborator and evaluator" (p. 7). Belfiore and Burnaby (1995) also indicated that teachers in the workplace English programs play more than the teaching roles.

Teacher's role in the workplace context proves to be comprehensive, which includes program consulting, curriculum development and assessment.

- The workplace *EOP delivery and methods* rely on role play, case studies, communicative competence development scenarios incorporating authentic contexts, simulation and spontaneous conversation. This is in line with Hutchinson and Waters' (1987) earlier methodology theories. In addition, it is also found in the study that training methods from other activities such as industrial training and sales training can be used in workplace *EOP* training. These include experiential learning, which is expanding the scope of *ESP* training methodology literature.
- Teachers should understand *students' learning styles, strategies, personality, motivation, occupational specialization and work experience*. Teaching style should match with student's learning style and teachers should "activate learner's unique learning style", which was first raised in Kim (2008, p. 20).
- Teachers can provide their trainees with learning *resources and support*, such as multimedia materials, books and magazines. Online learning platforms can be resources for learning, although Lockwood (2002) indicated that there would be "considerable costs in the development of the program" (p. 354). On-the-job communicative competence development in the workplace also offers a good channel for support.

- Favorable *human resources training and development policies* support workplace *EOP* training through reimbursement of course fee, recruitment and promotion packages. Companies in this study also view the favorable training and development policy as strategic company strategy and investment in the human capital development.

#### *Factors hindering effective program implementation*

- For the *assessment requirements*, pre-course and post-course assessment can help to better evaluate the learning gains. However it may be missing from *EOP* program implementation as trainees are reluctant to be evaluated in this context. The use of formative assessment (Brown, 1989) is recommended to help trainers reflect on and improve the program provision quality. Dudley-Evans and St. John (1998) summarized that “short intensive *EOP* courses are not usually concerned with testing learners’ proficiency”, thus it is possible for international professional communication courses to be introduced into “longer intensive and extensive *EOP* courses” (p. 148).
- In the *climate and environment*, the working language is Chinese in most scenarios, which may constrain on-the-job communicative competence development. When the working language is English, the chances of

international business communication competence development may also increase.

This chapter first discusses the findings from the three case studies to answer the research questions. This chapter then discusses and compares the results of stage one and stage two study. The findings are finally discussed with those of previous research to demonstrate its contribution to the literature.

## CHAPTER 11

### CONCLUSION AND IMPLICATIONS

#### 11.1. Summary of findings and the contributions of this study to workplace

##### *EOP* training and evaluation theory

This study aims to address the research questions i.e. How effective are *EOP* training programs in preparing employees for global business communication in the workplace? and What factors contribute to and hinder the effectiveness of *EOP* training programs in the workplace?. This study comprises of two stages. Stage one relies on in-depth qualitative interviews and business document study with policymakers, business employers, training providers and working adults as well as written surveys and self-assessments with working adults to investigate the effectiveness and the existing challenges of workplace *EOP* training programs in Hong Kong and mainland China. Stage two relies on case studies to evaluate the effectiveness of workplace *EOP* training programs in three companies in mainland China. The factors influencing the training effectiveness are explored. The major findings and contributions of the study to workplace *EOP* training and evaluation theory are presented in this section.

#### 11.1.1. Workplace *EOP* training effectiveness

In the Chinese literature, according to Jiang (2013), workplace English training is considered of strategic importance as it can win companies international competitiveness to integrate more quickly into the global market. English training can equip companies with an international outlook, help with international business operation and develop creativity. In export-oriented companies, according to Zhao and Di (2011), employees' English communicative competence is considered core company competitive advantage. English training is believed to be the key route to developing employees' English communicative competence. However, Kong (2012) found poor English competence due to the de-emphasis on English communicative competence development activities. This has lead to productivity loss in international cooperation projects.

This study contributes to the literature as it is the first kind of study to use both quantitative and qualitative data collection methods in evaluating the effectiveness and the comprehensive impact of workplace *EOP* training programs in the Chinese context. This evaluative study assesses training effectiveness by looking at different variables.



### *Short-term training program effectiveness*

The *intended outcomes* could be helping engineers to successfully pass machinery training in the U.S. or helping employees reach an intermediate level of communicative competence. There could be gradual improvement, aligned with the Business English Certificate Preliminary or the College English Test Band 4. However, to be more effective, according to the Hong Kong practices, the intended outcomes should be pegged into a qualification framework within the curriculum. A relevant qualification framework needs to be built up in the mainland China context.

The *unintended outcomes* can include enhanced personal confidence, personal development, career growth, professional competence development and job performance enhancement and increased teamwork. The unintended outcomes are related to soft skills development, career and job performance, and can be addressed more comprehensively in different workplace *EOP* training programs to include the business impact, i.e. the long-term effects.

### *Long-term program impact on job performance and business operation*

For the *long-term learning outcomes*, improvement may decline after three months' workplace *EOP* training and the literature agrees that considerable long-term learning progress is unusual. It depends on individual commitment in the learning process. Nevertheless, this study has produced two excellent success examples.

Regarding the *difficulties in learning/workplace*, problems remained in listening comprehension, pronunciation, vocabulary and professional communication, grammar, colloquial expression and professional terminology. There were various other problems such as technical communication, in other individuals in various workplace *EOP* programs.

For *sustainability of learner autonomy*, training participants may join in other English language related activities, such as enrolling in additional training courses or conducting self-access learning activities. The value of persistence and motivation is recognized. Workplaces in Hong Kong are also aware of the importance of commitment to workplace English learning.

Good *international business communication performance* can reduce miscommunication, increases productivity and decrease business costs. This appears to be true across the different workplace *EOP* programs in this study.

For *skills development for employment and employability*, training benefits job promotion, job admission and career development. This is also true across the different workplace English programs in this study.

For *return on investment*, training programs are expected be cost-effective. However, it may be difficult to measure the actual ROI ratio, which can be replaced with other indicators such as the reduced working hours and minimized business communication errors.

For *sustainable livelihoods*, workplace *EOP* training programs facilitate international trade and exchanges while generating good job performance, which ensures sustainable livelihoods.

#### 11.1.2. Factors influencing workplace *EOP* training effectiveness

In the employee training and development literature on management education, based on a meta-analytical study, many factors have been shown to influence

the training transfer such as “motivation of trainee, supportive transfer climate, pre-training self-efficacy, work environment, trainee characteristics, peer support etc.” (Blume et al., 2009). In this study, there are also factors which may contribute to and hinder the effectiveness of *EOP* training programs in the workplace.

In the previous Chinese context study discussing the petrochemical company employees’ English training, Li X. (2011) found the de-emphasis on training program evaluation system and poor learning outcomes. Other problems in program development lie in the training content, which may be irrelevant to the workplace or too theoretical (Xie, 2010; Li X., 2011), unclear training needs assessment, training objective and unsystematic training program management (Gan H. Y., 2008). In program implementation, there can be problems in monotonous training methods without the assistance of modern teaching techniques (Xie, 2010; Gan H. Y., 2008), incompletely run training program (Yuan, 2010) and these incur more costs than benefits (Gan H. Y., 2008). Moreover, training participants have their own problems in the workplace English learning process, such as in Chinese way of thinking (Xiao and Wang, 2012; Yuan, 2010), learning attitudes (Yuan, 2010), motivation, prior learning experiences (Liu and Huang, 2005), which have negative influence on the learning outcomes.

This study contributes to the literature by identifying the positive and negative factors in the program design and implementation across different workplace *EOP* training programs to determine whether there is any “fault” in the process and whether there is room for improvement.

#### *Workplace EOP training program design*

*Training needs analysis* can be conducted by face-to-face talk with the general manager or HR manager, or by conducting training needs survey. Training needs analysis can be more effective if real language requirements are elicited from the workplaces, as has been practised in other workplace *EOP* training programs.

For *course content and material*, textbooks and handouts can be used as the course materials. Workplace *EOP* programs can also tailor materials based on the authentic language requirements collected from the workplace.

In *class size*, one teacher to 8 to 12 students would be optimal. One-on-one teaching is the most effective, but may be lonely and tiring. One teacher for 30 people is difficult to handle.

For *class time*, scheduling classes in the evening may not be effective. Scheduling in the daytime and during work hours is preferable. Course length may be an important factor affecting the program effectiveness.

Regarding *teacher's qualifications*, the teacher should be experienced in workplace *EOP* program delivery and possess the relevant qualifications. It could be challenging for a teacher to be ready for the multiple tasks in program delivery.

In this study, most of the program design factors lead to effective program implementation, except for the factors of class size and class time in case study 2, which had negative impact on actual program implementation. The training needs analysis could have been more thorough in case study 1 and case study 3, to include authentic workplace discourse (Koester, 2010) in the course materials, which might have led to more effective and efficient program implementation. The other workplace *EOP* programs under investigation either collected authentic materials from the workplace or used ready-made textbooks and handouts. Moreover, it has become a trend to use corpora and discourse as the source of “authentic language data” and course materials to align with the target language use (Hewings, 2012; Paltridge, 2012).

### *Workplace EOP training program implementation*

In the *conception of teacher's role*, teachers can play different roles in workplace *EOP* training programs, including director, organizer, translator, instructor, researcher, intercultural trainer etc.

In *views and understanding of teaching and learning delivery and methods*, teachers should use different training approaches, including role play, case studies, communicative competence development scenarios, and integrated training approaches which combine task-based, text-based methods etc. Authentic case studies have been introduced in workplace *EOP* training programs in Hong Kong in this study.

Teacher's teaching style and strategy should match with students' learning styles, learning strategies and personality. Students' motivation in workplace *EOP* programs is relevant to job performance and productivity. Students' occupational specialization and work experience are also resources for learning. This is true across the different workplace *EOP* programs in Hong Kong and mainland China analyzed in this study.

In *assessment requirements*, pre- and post-course assessments are helpful for the trainer to diagnose the learning gap using international benchmark tests such as the Business English Certificate. Missing assessment requirements could be a factor constraining effective program implementation. This is true across the various training programs in mainland China and Hong Kong analyzed in this study.

#### *Vocational context*

For *climate and environment*, on-the-job learning is a good way to enhance communicative competence development. The presence of Chinese as the working language may constrain the communicative competence development. In some of the workplaces in this study, the presence of English as the working language has provided the required atmosphere for on-the-job practice.

Different *resources and support* can be provided to employees, such as an English use environment and an online learning platform. There are existing E-learning platforms in companies in mainland China.

For *human resources training and development policy*, companies should provide favorable recruitment policies or motivating schemes supporting



English learning. Companies and government also invest in employee English training in the workplaces in Hong Kong and mainland China in this study.

In the program implementation stage, most of the factors led to short-term learning outcomes and long-term effects, except for the factors of assessment requirements, which were missing in some case study programs and the climate and environment in which Chinese as a working language could constrain effectiveness. Most of the workplace *EOP* programs under investigation in Hong Kong and mainland China used summative assessment, i.e. end-of-course tests and surveys. The use of Chinese (Putonghua or Cantonese) as a working language depends on the working environment. Companies in Hong Kong have large variations in the workplace language use. Factors of *teacher's roles, understanding of teaching and learning, students' learning style, strategy, personality and motivation, resources and support, HR training and development policy* had positive impetus towards effective program implementation. These findings can be applied to other programs under investigation in Hong Kong and mainland China.

### 11.1.3. The workplace *EOP* training program evaluation framework

Within *EOP* program evaluation literature, Hutchinson and Waters (1987) indicated the evaluation is concerned with “what should be evaluated, how a course can be evaluated, who should be involved in the evaluation and when the evaluation should take place”. Specifically, an evaluation can test “whether the course fulfills learner needs” and whether there is any fault in the course design in “syllabus, materials, teaching and learning techniques, the testing procedure, the logistic/administrative arrangements and the course evaluation system”. A course can be evaluated using data from “test results, questionnaires, discussion, interviews and informal methods”. “*EOP* teachers, learners and course sponsors”, among others, can be involved in the evaluation. Evaluation can take place “early in the course, at regular intervals, at the end of the course or after the course” (p. 152). Dudley-Evans and St John (1998) argued that evaluation can be both “qualitative and quantitative” in nature. At the different time, evaluation can focus on aspects such as the “learning resources, the classroom activities, the out-of-class support, the course design, teaching methodologies and the role of assessment” (p. 128).

This study applies an updated workplace *EOP* training program evaluation framework (see **Figure 6**) to the workplace *EOP* context, based on which the

findings are described and discussed in answering the research questions. This evaluation framework incorporating different theoretical perspectives, guides the examination of training program effectiveness through collecting data on various factors of training program design, training program implementation, variables of short-term training effectiveness and long-term effects. Based on the evaluation framework, various instruments have been used to collect data, including qualitative interviews, surveys, documentary study and participant observation etc. with cross-sector workplace *EOP* program representatives, training participants, HR manager and the workplace trainer. The case study findings are compared with those of qualitative interview with workplace *EOP* training program representatives from different companies in Hong Kong and mainland China. The purpose of using different instruments is to be able to achieve triangulation of findings.

The strength of this evaluation framework is that it incorporates important topics relevant to workplace *EOP* training such as training needs analysis, teacher's qualification, assessment, learner autonomy and sustainable livelihoods. This is to examine the comprehensive impact of workplace *EOP* training programs on trainers, training participants, sponsors, the company and the environment. Both short-term learning outcomes and long-term effects are assessed by looking into the relevant training effectiveness variables.

There are also limitations in the workplace *EOP* training program evaluation framework. One limitation is it is difficult to gather information with all the factors and variables in the evaluation framework. Some information such as the ROI ratio is difficult to obtain. A longitudinal study is more meaningful for further study. Another limitation is that it uses more qualitative than quantitative data to evaluate the effectiveness of the workplace *EOP* training programs. Further studies using this evaluation framework can increase the input of quantitative data for evaluative purposes.

#### 11.1.4. Developing effective workplace *EOP* training programs in Hong Kong and mainland China

In developing “a model of workplace curriculum” to maximize the function of workplace as a learning environment in a structured way, Billett (2001a) thought the process should follow the steps of “identifying work areas, sources of information, the scope of activities and knowledge, goals of performance and delineating the learning pathway” (p. 106; p. 121). There are “different requirements for different workplaces”, manifested mainly in the “technical requirements of the work in a particular workplace, the scope of tasks and interaction, the focus of learning and the situational needs”, which makes it

difficult to standardize the workplace curriculum (p. 180). It is recognized that “task factor, workplace practice factor and relationship factor” will all have effects on the development of workplace curriculum (p. 181).

Though focusing on learning activities and learners, the workplace curriculum also follows similar formal curriculum process to those in the educational institutions, which include “course objective, content, method and evaluation”, within which there is the guided instruction of teacher or mentor (Billett, 2001a, p. 132; Marsh, 2004, p. 23).

The findings of this study show that the current status of workplace English training program provision is more diverse, customized and quality assured in Hong Kong than in mainland China, where the requirements vary with the business contexts. Effective workplace English training programs have a range of course design and implementation strategies which are transferable from one business context to another, mainly in the aspects of *identification of different workplace English learning needs, development of effective training programs based on the needs and provision of resources and support*. Based on this study’s findings, success strategies of effective workplace English training programs in the Chinese context are presented in **Table A 26**.

Based on the empirical findings and the success strategies for developing and implementing workplace *EOP* training programs, this study proposes the following definition of an effective workplace *EOP* training program in the Chinese context:

An effective and efficient workplace *EOP* training program not only improves language standards and business English communication skills development, but also increases learners' confidence and motivation to continue learning. The program can improve employees' job performance and organizational development. The program can also facilitate business globalization and sustainable livelihoods. The program development and implementation process involves systematic training needs analysis, up-to-date and relevant material and tailored training methods, proper course length, class time and class size arrangement, continuous program evaluation including short-term and long-term impact assessment and formative evaluation. The program creates English learning atmosphere and provides resources of learning. The program is usually aligned with a qualification framework which enables the standardization of the program operation. For trainers, a broad range of training skill sets are required including curriculum and assessment, language ability and business experience. Trainers with suitable personal qualities also have a thorough

knowledge of learners, including such information as learning strategy, learning style, personality, motivation, workplace experience and professional background. The workplace *EOP* training program should be flexible and enjoyable.

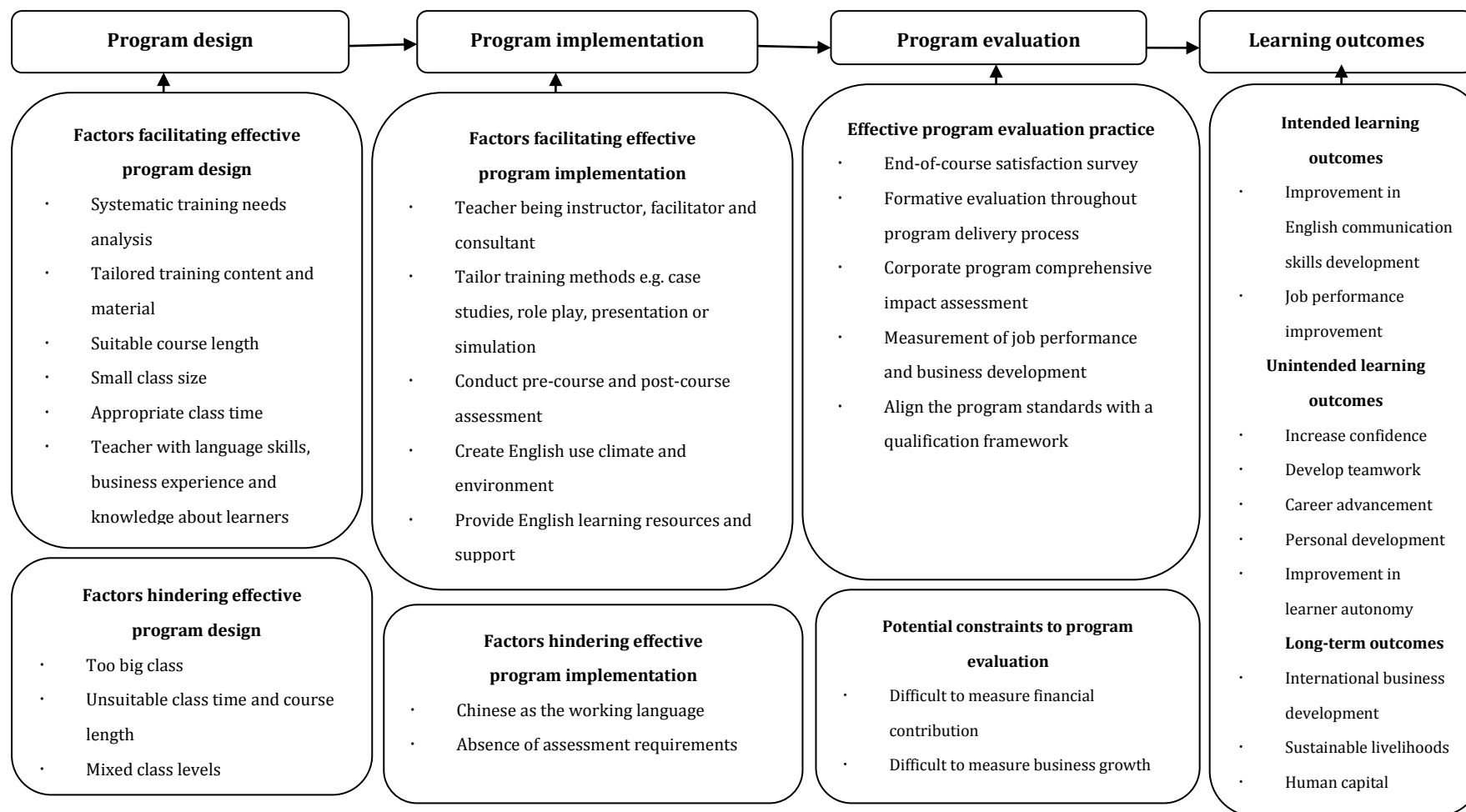
The model of effective workplace *EOP* program development and implementation, which summarizes the conclusion of this study, addresses the training effectiveness and the influencing factors of workplace *EOP* training programs in the Chinese context is developed which is generalizable to other contexts (See **Figure 9**).

**Table A 26 Success strategies of effective workplace *EOP* training programs in the Chinese context**

<i>Identification of different workplace English learning needs</i>	<i>Development of effective training programs based on the needs</i>	<i>Provision of resources and support</i>
<ul style="list-style-type: none"> <li>Identify real English language use in the workplace, e.g. spoken English skills for the hotel and catering industry or communication in a particular setting e.g. customer service</li> <li>Collect sample workplace English communication materials</li> <li>Face-to-face talk with training participants and decision-maker (such as HR or GM) to ensure course relevance to the business requirements</li> <li>Observe workplace English communication onsite for 1 - 2 days</li> <li>Recommend a full-scale communication audit for 2- 3 weeks or a comprehensive overview of the communication needs</li> <li>Understand employees' preferred learning styles and strategies</li> </ul>	<ul style="list-style-type: none"> <li>Need good teaching plan, good teaching process and effective evaluation</li> <li>Link the training needs and curriculum</li> <li>Follow standard steps e.g. American TESOL, LCCI</li> <li>Tailor made courses in response to specific corporate needs</li> <li>Can be very specific, either in language or other subjects</li> <li>Adopt a variety of training methods</li> <li>Customize the training materials based on the standard templates</li> <li>Can achieve measurable improvement in English proficiency or staff performance</li> <li>Have pre-course and post-course assessment</li> <li>Evaluate training outcomes immediately after the program ends</li> <li>Evaluate long-term training impact</li> <li>Align training programs to workplace English qualification framework</li> </ul>	<ul style="list-style-type: none"> <li>Design E-learning self-access English learning platform</li> <li>Provide as many learning resources as possible</li> <li>Organize outside classroom English activities</li> <li>Organize English corner/Toastmaster</li> <li>Practice English through online learning software</li> <li>Create English learning atmosphere in the company</li> <li>Guidance/coaching by colleagues with experiences in handling communication issues</li> <li>Encourage on-the-job English use and practice e.g. chatting with expatriate colleagues</li> <li>Adopt English as a corporate communication language</li> <li>Develop favorable and supportive human resources and financial policies such as funding and subsidizing the programs</li> </ul>



**Figure 9: Model of effective workplace *EOP* training program development and implementation in the Chinese context**



## 11.2. Possible limitations of the study

This study investigates the effectiveness of workplace *EOP* training programs exclusively in Wuxi, mainland China and Hong Kong using qualitative interviews and case studies as the research methods. Due to constraints of financial, human resources, access and the issues of corporate confidentiality, this study has only been conducted with a selected number of participants. Future study sample can be larger and more representative to include other cities' or regions' *EOP* program case studies in the Chinese context, which would make the results more generalizable.

For the application of evaluation framework to evaluate the effectiveness of workplace *EOP* training programs in qualitative interviews and case studies , not all of the pertinent information is readily available through data collection, such as the financial benefits of workplace *EOP* training programs. Limited information is obtained due to constraints on access to data such as English training program budgets and ROI ratios, which makes the programs' contributions to business growth difficult to quantify.

The case studies are one-off short-term workplace *EOP* training programs. To understand more about the long-term learning outcomes, it is necessary to track

the performance changes of the training participants after either short-term courses or long-term structured programs.

The data collection for the case studies was conducted one year or more after program completion. The course delivery process was observed by the trainer or researcher through complete participant observation. Conducting the cycle of action research with both the trainer and the participants throughout the program implementation process would generate more suggestions for program improvement.

The training programs in the case studies only feature one trainer, i.e. the researcher. Thus, the evaluation would be more thorough if studies were conducted with other trainers in the same workplace.

### 11.3. Implications for the study and recommendations arising

#### 11.3.1. Implications for theory

Theoretically, this study adds dimensions to and improves our understanding of the workplace *EOP* training program outcome evaluation. It encompasses not only immediate training effect, but also medium to long term outcomes, as well

as the immediate and longer-term impact of workplace *EOP* training programs, which can be included into the program evaluation framework, within which the factors facilitating or hindering the effectiveness of workplace English training programs are demonstrated. Future studies can apply or modify this evaluation framework to assess other workplace *EOP* training programs.

Moreover, this study identifies characteristics and develops guidelines for effective workplace *EOP* programs based on the study findings. This, in turn, serves as a benchmark for evaluating the effectiveness of workplace *EOP* training programs.

This evaluation framework is based on a synthesized, multi-field, theoretical framework. This study implies that to evaluate the training effectiveness of workplace *EOP* programs and to investigate the factors influencing the training effectiveness, researchers not only rely on the theoretical perspectives of *ESP* and *Second Language Learning*, but many other fields related to the workplace context. This expands the theoretical scope of workplace *EOP* program evaluation.

### 11.3.2. Implications and recommendations for practice

#### 11.3.2.1. Implications and recommendations for teacher training

From the practice perspective, the findings of this study inform the overall workplace English trainer's professional development. The workplace *EOP* trainer with adequate professional qualifications should pay careful attention to these factors and bear in mind the broad picture regarding the short-term and long-term impact of workplace English training. Workplace *EOP* trainers should have hands-on experience of the process of designing and implementing the workplace *EOP* training programs and understand well the effective practices.

In addition, workplace trainers should absorb knowledge from different fields, including *ESP*, second language learning, adult education, business management training, workplace language and literacy, workplace training and learning, human resources development and communicative competence development. With a broad knowledge base, they can better handle the challenges workplace *EOP* training may bring.

#### 11.3.2.2. Implications and recommendations for workplace *EOP* training provision

Workplace *EOP* training providers should follow standard practice (needs analysis, curriculum design and implementation, assessment, program evaluation and quality assurance) in conducting workplace *EOP* training courses and align them with international test benchmarks or a competency framework to ensure quality program provision. Vocational English training programs should also comply with professional English standards or international business communication competency frameworks.

#### 11.3.3. Implications and recommendations for policy

##### 11.3.3.1. Implications and recommendations for government English language and workforce/continuing education policies

While Hong Kong has had a series of financial policies, i.e. WEC, CEF and other subsidizing schemes, the government in mainland China has not developed financial subsidy schemes for workplace *EOP* training programs at the national level.

In light of the strategic role English plays in ensuring smooth business operation and successful global communication activities, this study urges government policymakers to formulate favorable financial policies to promote and subsidize workplace *EOP* training programs.

#### 11.3.3.2. Implications and recommendations for corporate human resources training and development policies

Companies should allocate budgets for workforce training and development activities as strategic investment in human capital development and develop incentives to motivate employees to enroll in workplace English training courses developed by external training providers or in-house training programs. It is also recommended that companies more systematically plan their workforce training and development schemes, including workplace *EOP* training programs, and connect them with employee promotion packages and long-term strategic corporate development.

The findings of this study imply that the more strong support government and corporate policies give to workplace English trainers and learners, the higher program standards they can achieve. The ultimate goal is to facilitate the

workplace English competence of cities, improve their international image, and contribute to productivity increase and international business growth in China.

#### 11.4. Possible future research suggestions

##### *Quality assurance system for workplace EOP training programs*

Future research can develop a quality assurance system or mechanism for monitoring workplace *EOP* training program provisions, as the current cases in Australia, New Zealand and Hong Kong demonstrate. This will vary case by case in different companies. But this can facilitate the standardization of workplace *EOP* training in the Chinese context. The quality assurance system would also align with a competence framework. At present, the competency framework is still company specific, more often found in multinational companies. Thus, the competency-based workplace *EOP* training is also an area worth further exploration to reflect the training effectiveness measurable through key performance indicators or competencies developed by different companies.



### *Benefits of workplace EOP training and personal development*

Further studies can also explore the other benefits of workplace English training from short-term and long-term perspectives, and to measure the transferability of workplace business English communicative competence to employability and job performance and team development. As a kind of talent development scheme, the benefits of workplace *EOP* training programs are both multi-dimensional and individualized. There will be individual variation in light of the different personal development goals. The contribution of workplace *EOP* training to personal development is an important topic for future research exploration.

### *Impact of specific factors on workplace EOP training effectiveness*

In addition, research can also look at the specific impact of various factors on the effectiveness of workplace *EOP* training by analyzing the influence of teachers, students and vocational contexts on student learning outcomes, in addition to the effects of policy and environment on training effectiveness. This can extend to much more systematic research with the aim of boosting the productivity of workplace *EOP* training and increasing the ROI.

### *Company specific model of workplace EOP training*

As workplace *EOP* training is context specific, different companies can generate different cases or models of corporate programs. Their training effectiveness in program design and implementation is worth investigation. It is also necessary to examine specific corporate contexts, if resources permit.

### *Professional development of workplace EOP trainers*

In addition, future research can also focus on the professional development of workplace *EOP* trainers. As workplace *EOP* training is challenging, it is essential to examine the development of teacher training and accreditation systems to guarantee that workplace trainers have the necessary knowledge, skills and competencies to provide quality workplace *EOP* training programs.

### *Development of workplace EOP training materials*

Workplace *EOP* program materials need to be customized to meet the needs of different business and industry contexts. Future research can examine the issue of material tailoring, by evaluating and exploiting ready-made textbooks, producing handouts and using corpus or discourse-based materials as the trend

of *ESP* teaching indicates. Whether the teaching and learning materials reflect the target language needs and the students' attainment levels is an issue worth further study.

#### *Development of assessment system of workplace EOP training programs*

As most of the workplace *EOP* training programs are short-term intensive courses, it may not be acceptable to use only end-of-course summative assessments as the evaluation instruments. Formative assessment throughout the course implementation can be conducted to better reflect students' achievement. The development and customization of assessment systems for workplace *EOP* training programs to better measure the effectiveness of teaching practices is an area worth further exploration.

#### *Development of formal, informal and non-formal workplace EOP training system*

Based on the 70:20:10 principles, 70% of the learning in the workplace comes from jobs, 20% from people and 10% from formal learning (Lombardo and Eichinger, 1996). It would be worthwhile to explore the potential of informal and non-formal learning for workplace *EOP* training and development

programs. Future research can study on the role workplace environment plays in communicative competence development and the potential of alternative learning methods, such as E-learning and online learning platforms.

#### *Research from cross-cultural perspective*

Cross-culturally, future research can expand the study into other countries or regions with multinational companies who place great emphasis on workforce development, in particular professional communicative competence development. More cases are needed to improve the transferability of the findings to other industrial or cultural contexts.

It is hoped that this study contributes to the *ESP* program evaluation and workplace training literature by interpreting the training effectiveness of *EOP* training programs in the Chinese workplaces, i.e. Hong Kong and mainland China, based on a constructed evaluation framework. Designing and implementing workplace *EOP* training programs effectively to meet diverse business requirements follow systematic process, as specified in the model developed in this study. This study has indicated the challenges facing workplace *EOP* training practitioners, especially the trainers and the needs for continuous professional development to equip them with the necessary skills,

knowledge and competencies. The successful development and implementation of workplace *EOP* training programs are the results of concerted efforts of training providers, companies, employees who should be dedicated to the learning process and the government who is encouraged to formulate more favorable support policies. Moreover, with the reform of modern communication technology and learning tools, the climate, environment and resources of the workplaces will also have experienced dramatic changes compared to a decade ago. Workplace *EOP* training programs may transform from a single model of classroom-based formal learning to a combined model incorporating the alternatives of E-learning and informal on-the-job learning. Workplace *EOP* training programs may become more flexible and enjoyable, which not only benefit performance improvement, international business development but also enhance the international competitiveness of cities. Future research is encouraged to track the development in this area for the Chinese workplaces within the international research context, which is academically valuable and economically meaningful.

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## APPENDICES

### **Appendix 1: Invitation to Take Part in Interview Stage of the Project (English Version)**

Department of International  
Education and Lifelong  
Learning, Faculty of  
Education Studies

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**The Hong Kong Institute of Education**

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XIE Qing      D3-2F, Center for Lifelong  
Learning   Research and  
Development, The Hong  
Kong Institute of Education,  
HONG KONGWeb:  
[www.hkied.edu.hk](http://www.hkied.edu.hk)

Address and contact information of the addressees

Dear.....

I would like to invite you for the interview stage of my doctoral thesis project

*Investigating the effectiveness of English for Occupational Purposes (EOP)*  
*training in workplace: Case Studies of EOP programs in China.*

I sincerely hope you can accept my invitation. If yes, please let me know when  
you are available. And if possible interviews could be held in June 2012. I will  
email you an information sheet.

Thank you for your cooperation.

Yours sincerely,

.....

Xie Qing

Chief Investigator



## 研究项目访谈邀请函



香港教育學院

國際教育與終身學習系

教育研究院

謝 晴

D3-2F, 終身學習研究與發展中  
心, 香港教育學院, 香港

### 收信人的地址和联系方式

尊敬的.....

榮幸邀請您參加此項题为 考察職場英語培訓課程的有效性: 中國職業英語課程案例研究 的博士論文研究項目訪談。

真誠希望您能接受邀請。如果可以, 請告知您的時間安排。如果可能, 訪談會於 2012 年 6 月進行。您會收到一份“項目有關資料”。

感謝您的支持!

祝好,

.....

謝晴

首席研究員

## Appendix 2: Case Study Guide Invitation and Guide to Case Study (English Version)



The Hong Kong Institute of Education

Department of International  
Education and Lifelong Learning,  
Faculty of Education Studies

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XIE Qing D3-2F, Center for Lifelong  
Learning Research and  
Development, The Hong Kong  
Institute of Education, HONG  
KONG

Participant Address and contact methods

Dear Participant:

We would like to invite you to participate in an explorative study entitled *Investigating the Effectiveness of English for Occupational Purposes (EOP) Training in Workplace: Case Studies of EOP Programs in China*. The study aims to evaluate the effectiveness of *EOP* training programs in China's workplaces, and to explore the benefits of workplace *EOP* training programs to employee communicative competence development and business globalization.

Your participation will assist us in providing information for those who are involved or interested in workplace *EOP* training in China or any other countries where English is a foreign language.

In the study, the project investigator will conduct fieldwork by observing workplace English classes and employees' on-the-job business English communication activities, interviewing selected participants and conducting written learner survey. The project investigator may audiotape the spoken interactions and transcribe them for data analysis.

In sharing the responses and all other information obtained from the case study with others in oral presentations or published materials, your responses will remain anonymous. Every reasonable effort will be taken to ensure confidentiality.

The study is being conducted by Ms. Xie Qing, a PhD student, under the supervision of Professor Rupert Maclean, a Director of the Center for Lifelong Learning Research and Development and Chair Professor in the Department of International Education and Lifelong Learning, part of the Faculty of Education Studies at the Hong Kong Institute of Education.

This study will form the basis of Xie Qing's thesis for the degree of Doctor of Philosophy. If you have any questions or concerns about this research project, please contact Ms. Xie Qing by email or telephone.



The case study will be conducted from June to July, 2012. I sincerely hope you can accept my invitation. If yes, please let me know when you are available. And an information statement will be emailed to you in June.

Thank you for your participation.

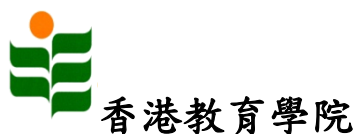
Yours sincerely,

.....

Xie Qing

Chief Investigator

## 案例研究邀請函及指引



國際教育與終身學習系

教育研究院

謝 晴

D3-2F, 終身學習研究與發展中

心, 香港教育學院, 香港

### 案例参与人的地址和联系方式

尊敬的.....,您好！

我们诚邀您参与此项开拓性研究 考察职场英语培训课程的有效性: 中国职业英语课程案例研究。此项研究旨在评估中国职场英语培训课程的有效性，开拓职业英语课程对于员工沟通能力发展以及商业全球化的益处。

您的参与将有助于为那些正在中国以及其他英语为外语国家从事职场英语培训的人士提供信息。

在此项研究中，项目首席研究员会开展实地考察，观察职业英语课程，员工的在职商务英语沟通活动，访问相关培训参与者以及进行书面学员问卷调查。项目负责人会对英语口语互动录音并转成文字作数据分析。

在与同行交流,会议陈述以及发表材料中引用您的意见以及在案例研究中获得的信息时,您的意见和信息是匿名的并且确保秘密。

此项研究由博士生谢晴开展。香港教育学院教育研究院，国际教育与终身学习系讲座教授，终身学习研究与发展中心总监马敬言教授指导。这项研究会作为谢晴博士论文的基础。对于这个研究项目您有任何问题或疑惑，请通过电子邮件或电话联络谢晴。

案例研究将于 2012 年 6 月至 7 月进行。希望您能接受邀请，参与研究。请回复并告知您何时有空安排。您会在 2012 年 6 月通过电子邮件收到一份“项目有关信息”。

感谢您的支持！

祝好，

.....

谢晴

首席研究员

### Observation Instruments

Case Study: Company A			Observation Instrument 1			Free Notes
Observation date: _____			Page _____ of _____			
TIME	Activity/Event (authentic business communication activities)	Performance Indicator (fluency, confidence, accuracy, effectiveness, appropriateness)	Student Modality (listening, reading, speaking, writing)	Employer View (satisfied/ dissatisfied/ suggestions)	Documents (email/fax/ technical manual/ phone record)	

Case Study: Company A			Observation Instrument 2			Free Notes
Observation date: _____			Page _____ of _____			
TIME	Activity/Event (simulation, role Play, tutorial, task)	Organization (T→Ss, S→S, Ss→T, Ss→Ss, etc.)	Content (management, subject matter, focus on form)	Student Modality (listening, reading, speaking, writing)	Materials	

Case Study: Company A Observation date: _____ of _____		Observation Instrument 3 Page _____	Free Notes
1. Who communicates?	Teacher / Student / Secretary / Manager / CEO / Customer / Supplier		
2. What is the pedagogical/business purposes of the communication?	To solicit / To respond / To react / To negotiate / To liaison / To track information / To confirm		
3. What mediums are used to communicate content?	Linguistic (Meeting / Presentation / Casual Talk) / Aural (Telephone) / Visual (Graph / Picture / Flow chart) / Written (Letter / Report / Email/Technical Manual) / Non-linguistic (Body Language) / Para - linguistic / Symbolic		
4. How are the mediums used to communicate areas of content?	Attend / Differentiate / Evaluate / Examine / Illustrate / Discuss Price / Present products / Question / Relate / Explain / Interpret		
5. What areas of content are communicated?	Speech production / Life / Skills / Personal / Business related / Department affairs / Social Issues / Procedure / Administration / Sales of products / Order of goods / Quality Control / Technical Details		

Adapted from Allwright D. and Bailey K. M. (1991). Appendix C: Foci for Observing Communication Used in Settings (FOCUS). *Focus on the Language Classroom: An Introduction to Classroom Research for Language Teachers*. New Directions in Language Teaching. Cambridge: Cambridge University Press. p. 206 - 207.

## CASE STUDY FIELDWORK GUIDELINE

### 1. Structure of workplace *EOP* program

- Participants
- Content, materials, activities, and language competencies
- Workplace/classroom environment

### 2. Elements of an effective *EOP* program delivery

- Definition of *EOP*
- Training methodology (role play/simulation/case study/oral presentations/other)
- Scope of *EOP* implementation

### 3. Learner as Resources

- Attitude to learning
- Motivation to learning
- Job experience
- Occupational knowledge
- Preferences for alternative training methods
- Preferences of learning methods (learning strategy/learning style)

### 4. Teacher as Resources

- Teacher's belief
- Teacher's role
- Teacher's planning
- Audiovisual learning resources

#### 5. Vocational Context

- Human resources training and development policy
- Budgeting for training (investment cost, facility, time lapse etc.)
- Adult learning characteristics (autonomy, self-directed learning of English)
- Management support to training
- Workplace climate for learning *EOP*

#### 6. Impact on people

- The role of learner's expert knowledge
- Business communication skills development
- Job promotion
- Salary Increase
- Learner autonomy in *EOP* learning

#### 7. Impact on program

- Meeting student needs

- Teacher quality/teacher training
- Materials/learning aids (e.g. multimedia, one-on-one tutorial, peer support)
- Curricular innovation
- Sustainability of *EOP* training activities

#### 8. Impact on workplace

- Changing trends in workplace communication
- Performance improvement through language learning
- More international business deals
- Business profit growth
- Corporate globalization
- Business expansion
- Human capital development

#### 9. Impact on Skills Development for Employability

- Development employees' knowledge, skills and competence in business communication activities
- Develop employability
- Employee mobility in the labor market

#### 10. Impact on Sustainable Livelihoods in China



- Contributions to corporate profit growth
- Contribution to regional poverty alleviation
- Contribution to economic development

Adapted and Developed from Kim D. (2008). *English for Occupational*

*Purposes: One Language?*. London: Continuum. p. 149.

### Appendix 3: Interview Questions (Training Providers)

Name of Interviewer \_\_\_\_\_

Date \_\_\_\_\_

Name of Interviewee \_\_\_\_\_

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#### Sample In-depth Interview Guide

“Good morning, I am \_\_\_\_\_ (introduce self).”

“This interview is being conducted to get your input about *English for Occupational Purposes* training in the workplace. I am especially interested in your views with regard to workplace *EOP* program delivery.”

“If it is okay with you, I will be audio recording our conversation. I am doing so to get all the details as I carry on an attentive conversation with you. I assure you that all your comments will remain confidential. I will be compiling a report, which will contain all staff comments without any reference to individuals. If you agree to this interview and the recording, please sign this consent form.”

“I’d like to start by having you briefly describe your responsibilities and involvement thus far with workplace *English for Occupational Purposes* training.” (*Note to interviewer: You may need to probe to gather the information you need.*)

“I am now going to ask you some questions that I would like you to answer to the best of your ability. If you do not know the answer, please say so.”

### **Students**

1. Please provide your best estimated percentages for each category of learners currently enrolled in your institution:

Undergraduate/Postgraduate \_\_\_\_\_ %    Occupational learners \_\_\_\_\_ %

Adult, non-occupational learners \_\_\_\_\_ %    Others \_\_\_\_\_ %

2. If you have occupational learners, what kind of businesses or industries are they working in?

3. Compared with academic English or traditional English, what types of English are being used in the companies? How important is *EOP* to employees in China’s workplaces? On what occasions will they have to use English in their daily work?

4. What are the greatest benefits to your students for undergoing *EOP* training in the workplace? Will they be promoted or have their salaries increased after the training? (*Note to interviewer: You may need to probe to gather the information you need.*)

5. What are the difficulties your students experience in learning *EOP*?

6. What are the most favorable workplace learning styles and strategies for your students?

**Teachers**

7. How many years of experience do you have with workplace *EOP* training programs?

1-3 years      4-6 years      7-10 years      Over 10 years

8. What types of *EOP* programs do you usually provide for the workplace—extensive, intensive, or self-access?

9. How are the curriculum/lesson plans developed? Please describe the process using as much detail as possible. Please indicate if there are any relevant documents such as curriculum guidelines, policies or standards.

10. How do you conduct a needs analysis before a workplace *EOP* training program starts? What are the current needs for workplace *EOP* learning in businesses in Wuxi/Shanghai/Hong Kong? Please provide cases.

11. Can you give examples of “good practice” workplace *EOP* training programs?

12. According to your knowledge and experience, what do you consider are familiar topics in a workplace *EOP* training program?

13. How do you tailor workplace *EOP* training programs to different industries/occupations?
14. Do you use textbooks, handouts, or PPTs in the programs?
15. How do you tailor your materials to specific business/industry/occupational needs?
16. What types of activities do you often organize in the programs?
17. How do you tailor the activities to specific business contexts?
18. Do you incorporate authentic work scenarios into the training?
19. Is the language taught in *EOP* programs different from or the same as the language used in daily business?
20. Do you use tutorial/workshop/mentoring formats?
21. What type of workplace *EOP* training methods do you typically use for your programs?
22. How often are workplace *EOP* courses learning centered, collaborative, experiential, reflective, and learning team based?
23. In which situation/topic would a skills-based or micro-training approach be effective?

24. Would you deliver *EOP* training in occupational or task settings by using simulation, conversation, cases, or specialized methods to develop global business communicative competence? In which situation/topic would you use situated learning, technology-enhanced learning, action-based learning, authentic task engagement, mentoring, coaching, or apprenticeship?
25. In which situations/topics would you specifically construct learning and training climates, tailor workplace-learning curriculums, and select instructional media?
26. What roles do you play in workplace *EOP* training: facilitator, consultant, change agent, or simply an instructor? Do you often provide business communication consulting services to the companies?
27. How do workplace *EOP* trainers usually liaise with the company?

### **Vocational Context**

28. What is the human resources training and development policy specially designed for *EOP* training, on salary increases or career development?
29. What are the financial policies supporting the investment in *EOP* training program in the workplace? Special training funds?
30. What are the resources available for the *EOP* programs in the workplace?

31. Does management support the training and development activities in employees' global business communicative competence development?
32. What do you think is the preferable mode for China's workplace? A formal traditional class-based teaching model or a flexible, autonomous way of learning? (*Note to interviewer: You may need to probe to gather the information you need.*)
33. Do you prefer a personalized mode of training, which tailors for individual employee learning needs?
34. Do your employees continue learning English after completing the program?
35. Are learners active in the training process?
36. Do you organize activities related to workplace English learning, such as English Corner?
37. Do you encourage learners to watch English movies for learning purposes?
38. What do you think is the most effective learning method for employees to learn *EOP* in the workplace?

### **Workplace Training Effectiveness**

39. How often and in what way can workplace *EOP* training programs be evaluated? Do you have matrix of quality assurance principles to guide the process? (*Note to interviewer: You may need to probe to gather the information you need.*)

40. Have you organized ongoing training for teachers for the workplace *EOP* programs and in what ways? Please explain.

41. What are the intended learning outcomes for *EOP* training in the workplace?

42. How effective are the workplace *EOP* training programs in improving employee job performance with regard to the international business communication activities in your company?

43. What types of concern have you had or have heard about regarding the availability of the materials or equipment? What other problems are you aware of? (*Note to interviewer: You may need to probe to gather the information you need.*)

44. Have you observed any changes with learners with regards to their performance in class and attitudes of learning *EOP*?



- 45 How do you envisage the English program for occupational learners in your institution 5 years from now?
46. How are good practices embedded in future workplace *EOP* programs?
47. Is there any information about the impact of the program that you think it would be useful for me to know? (*Note to interviewer: You may need to probe to gather the information you need.*)
48. In what respects can workplace *EOP* training programs improve job performance in an English-medium environment?
49. In what respects can workplace *EOP* training programs promote business growth? (*Note to interviewer: You may need to probe to gather the information you need.*)
50. What are the major benefits of conducting *EOP* training for the company?
51. How can *EOP* training in the workplace promote sustainable livelihoods in China?
52. How can *EOP* training promote employability skills development?
53. How can *EOP* training facilitate business globalization?
54. How does *EOP* training in the workplace facilitate long-term corporate human capital development?

55. How do you measure the contribution of *EOP* training in the workplace to business growth in financial terms?

56. How do you calculate the cost benefit and return on investment ratios for *EOP* training programs in your company?

#### Appendix 4: Interview Questions (Industry Representative)

Name of Interviewer \_\_\_\_\_

Date \_\_\_\_\_

Name of Interviewee \_\_\_\_\_

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##### Sample In-depth Interview Guide

“Good morning, I am \_\_\_\_\_ (introduce self).”

“This interview is being conducted to get your input about *English for Occupational Purposes* training in the workplace. I am especially interested in your views with regard to workplace *EOP* program delivery.”

“If it is okay with you, I will be audio recording our conversation. I am doing so to get all the details as I carry on an attentive conversation with you. I assure you that all your comments will remain confidential. I will be compiling a report, which will contain all staff comments without any reference to individuals. If you agree to this interview and the recording, please sign this consent form.”

“I’d like to start by having you briefly describe your responsibilities and involvement thus far with workplace *English for Occupational Purposes* training.” (*Note to interviewer: You may need to probe to gather the information you need.*)

“I am now going to ask you some questions that I would like you to answer to the best of your ability. If you do not know the answer, please say so.”

### **Training Needs and Preferences**

#### **培訓需求和偏好**

1. Why do you want employees to attend business English communication/professional English training courses? (您需要員工參加商務英語或專業英語培訓的原因有哪些?)
2. How important is *EOP* to employees in China's workplaces? (職業英語對於中國的職員有多重要?)
3. On which occasions will they have to use English in daily business? (在日常工作的哪些場景中員工需要使用英語?)
4. What are the greatest benefits to employees for undergoing *EOP* training in the workplace? Will they be promoted or have their salaries increased after the training? (培訓職業英語對於員工的最大益處是什麼？培訓後他們是否會有升職或加薪?) (*Notes to interviewer: You may need to probe to gather the information you need.*)
5. Please list the documents you would like employees to be able to produce in English. (請列出您需要員工用英語製作的文檔。)

6. What do you feel are your employees' weaknesses in producing these documents in English? (您覺得員工製作這些英文檔的不足有哪些?)

7. Please list the scenarios in which you would like your employees to present oral English communication skills. (請列出員工需使用英語口頭溝通技能的場景。)

8. What do you feel are your employees' weaknesses in performing in these oral English communication scenarios? (您認為員工用英語口頭溝通的不足有哪些?)

9. What are the preferred learning styles and strategies for your employees in the workplace?

(職場員工偏好的學習風格和策略有哪些?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

10. What do you think is the preferable mode for workplace *EOP* courses for your employees? A formal traditional class-based teaching model or a flexible, autonomous way of learning?

(您認為哪一種是員工比較喜歡的公司職業英語培訓模式？正式傳統的課堂教學模式，還是自主學習的模式?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

11. Compared with academic or traditional English, what kinds of English are being used in your company? (與學術英語或傳統英語相比, 公司裡正使用什麼類型的英語?)

12. Is the language taught in *EOP* programs different from or the same as the language used in daily work? (職業英語課程教授的語言與日常工作使用的語言不同還是相同?)

13. What difficulties do employees experience in learning *EOP*? (員工學習職業英語會遇到哪些困難?)

14. In terms of *EOP* proficiency, where would you group the employees by percentage on a four-point scale, representing the levels from beginner, lower intermediate, upper intermediate to advanced? (有關職業英語, 您認為您的員工按照百分比分組,分別在哪幾個水準點上,從 1-4 代表初學水準,中低水準,中高水準和高級水準?)

1		2		3		4	
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With regard to document writing, where would you group them by percentage on this scale? (有關員工的文件書寫, 您認為您的員工按照百分比分組,分別在哪幾個水準點上?)

1		2		3		4	
---	--	---	--	---	--	---	--

With regard to their performance in oral communication scenarios, where would you group them by percentage on this scale? (有關員工的口頭溝通，您認為您的員工按照百分比分組，分別在哪幾個水準點上?)

1		2		3		4	
---	--	---	--	---	--	---	--

15. In your workplace, how important is the level of English proficiency in each area? (在你的公司，有關英語水準您認為以下 4 項 聽,說,讀,寫 有多重要?)

	Not important at all	Little important	Average
Important	Very important		
Reading			
Listening			
Speaking			
Writing			

### Trainers

#### 培訓師

16. Can you give examples of "good practice" workplace *EOP* training programs? (對於優秀的職業英語培訓課程您能否舉一些例子?)

17. How do you tailor workplace *EOP* training programs to different industries/occupations?

(您如何制定適合不同行業/職業的職業英語培訓課程?)

18. Do you use textbooks, handouts, or PPTs in the programs? (您是否在課程中使用教材，講義，幻燈?)

19. How do you tailor your materials to specific business/industry/occupational needs? (對於改編材料符合特定的商業/工業/職業需求您有什麼建議?)

20. What types of activities do you often organize in the programs? (職業英語培訓課程中您建議使用哪些活動?)

21. How do you tailor the activities to specific business contexts? (對於設計符合特定商業環境的活動您有什麼建議?)

22. Do you incorporate authentic work scenarios into the training? (您是否在培訓中使用模擬工作場景?)

23. Have you organized job-related training in other subjects? (您有沒有組織過其它與工作相關的主題培訓?)

Yes (有) \_\_\_\_\_ No (沒有) \_\_\_\_\_

If yes, please explain (如果有，請解釋)\_\_\_\_\_.

24. Which types of training have you organized?" (Orientation Training/Technology Training /Ethics Training/Workplace Communication Training/ Leadership Training/ Teacher Training /Other?) If so, please explain.  
(您組織過什麼類型的培訓？新員工導入/技術培訓/道德培訓/職場溝通培訓



/領導力培訓/教師培訓/其他? 如果有, 請解釋) (*Notes to interviewer: You may need to probe to gather the information you need.*)

25. Can the training methods for job-related training in other subjects be applied to workplace *EOP* training? (其它職場課程的培訓方法能否運用到職業英語培訓中?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

26. Do you use tutorial/workshop/mentoring formats? If yes, please explain (您是否使用小組輔導/工作坊/一對一輔導的方法? 如果有, 請解釋\_\_\_\_\_.)

27. What type of workplace *EOP* training methods do you typically use for your programs? (您在職場英語培訓課程中有代表性的培訓方法有哪些?)

28. Has task-based learning (role play, simulations, case studies, project work, oral presentations) been used in workplace *EOP* courses? (基於任務的學習方法如角色扮演, 模擬, 案例研究, 項目活動, 口頭培訓等方法能否運用到職業英語培訓課程中?)

29. How often is workplace *EOP* courses learning-centered, collaborative, experiential, reflective and learning-team based? (職業英語培訓課程是否經常是以學習為中心, 合作型, 經驗導向, 反思性和以學習小組為基礎的方式進行的?)

30. In which situation/topic will the skill-based or micro-training approach be effective? (哪些情境/話題以技能或微格培訓的方法比較有效?)

31. Would you prefer *EOP* training in occupational or task settings to be delivered by simulation, conversation, cases, or specialized methods to develop global business communicative competence? (職業或任務場景下的職業培訓是否應該使用模擬，會話，案例或特定方法提高全球商業溝通能力?)

32. In which situation/topic would you prefer situated learning, technology-enhanced learning, action-based learning, authentic task engagement, mentoring, coaching, or apprenticeship? (哪些場景/話題培訓師會使用場景學習，技術輔助學習，行動學習，模擬任務參與，輔導，教練或學徒式的學習?)

33. In which situations/topics would you specifically construct learning and training climates, tailor workplace-learning curriculums, and select instructional media? (哪些場景培訓師會需要創建學習和培訓的氛圍，特設職場學習課程以及選擇多媒體?)

34. What roles do teachers play in workplace *EOP* training: facilitator, consultant, a change agent or simply an instructor? Do teachers often provide business communication consulting services to the companies? (職業英語課程

中教師扮演什麼樣的角色：推動者，諮詢師，變革助推者或只是簡單一個講師？老師是否經常提供商業溝通諮詢服務予公司？)

35. How do workplace *EOP* trainers usually liaise with the company? (職業英語培訓師與公司之間通常是怎麼聯絡的？)

### **Workplace Training Effectiveness**

#### **職場培訓有效性**

36. Is there any information about the impact of the program that you think would be useful for me to know? What are the major benefits of conducting *EOP* training in the workplace for your company? (您有否這個課程的影響的有關資訊？對於貴公司來說職業英語課程的主要益處有哪些？) (*Notes to interviewer: You may need to probe to gather the information you need.*)

37. How often and in what way are workplace *EOP* training programs evaluated? Do you have matrix of quality assurance principles to guide the process? (職業英語培訓課程評估多長進行？如何評估？您是否有品質保證原則來引導這個過程？) (*Note to interviewer: You may need to probe to gather the information you need.*)

38. How are good practices embedded in future workplace *EOP* programs? (優秀的職業英語培訓課程如何運用到今後的課程中？)

39. In what respects can workplace *EOP* training programs improve job performance in an English-medium environment? (從哪方面來看職業英語課程能提升英語環境中的工作表現?)

40. Do you think your employees can acquire global business communicative competence concurrent to the authentic tasks? (您認為員工能否在真實工作的同時習得全球化商業溝通能力?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

41. In what respects can workplace *EOP* training programs promote business growth? (從哪方面來看職業英語課程能促進公司成長?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

42. What concerns have you had or heard about regarding the availability of materials or equipment? (有關材料或設備您關心哪些方面?)

43. Are training materials such as textbooks and handouts sufficient and effective in achieving the learning outcomes? If not, do you have some additional suggestions? (培訓材料，即教材，講義是否足夠或有效能夠達到學習效果？如果不能，您有否另外的建議?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

44 What do you think of the training activities for the *EOP* programs? Are they sufficient and effective in achieving the learning outcomes? (您認為職業英語課程的培訓活動怎樣？是否充分有效能夠達到學習效果?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

45. What do you think of the training methods for the *EOP* programs? Are they efficient and effective for the participating employees? (您認為職業英語培訓方法如何？對於參與員工來說是否高效和有效?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

46. How effective are the workplace *EOP* training programs in improving employee job performance with regard to the international business communication activities in your company? (職業英語課程對於提高公司的國際商務溝通活動的表現有多有效?)

47. Do your employees continue learning English after completing the program? (您的員工在課程結束後是否繼續學習英語?)

48. Is your business benefiting from employee improvement in global business communicative competence? (您的公司是否會在員工的全球商業溝通能力提升後受益?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

49. Do your employees need translation to understand machinery training in English?(您的員工是否需要英語翻譯來理解英語的機械培訓?)
50. Is your employees' business email writing/oral communication better than before?(您的員工商業電子郵件書寫或口語溝通是否有了提高?)
51. Can workplace *EOP* training programs facilitate the development of relationships with overseas customers and suppliers? (職業英語培訓課程是否能夠促進與海外客戶或供應商的關係?)
52. How can *EOP* training in the workplace promote sustainable livelihoods in China? (職業英語培訓如何能夠促進中國的可持續生計?)
53. How can *EOP* training promote employability skills development? (職業英語課程如何促進員工的就業技能發展?)
54. How can *EOP* training facilitate business globalization? (職業英語培訓如何促進企業的全球化?)
55. How does *EOP* training in the workplace facilitate long-term corporate human capital development? (職業英語培訓如何促進公司長期人力資本發展?)

56. How do you measure the contribution of *EOP* training in the workplace to business growth in financial terms? (您如何用財務數據測量職業英語培訓對於商業增長的貢獻?)

57. How do you calculate the cost benefit and return on investment ratios for the *EOP* training programs in your company? (您如何計算您公司的職業英語課程的損益以及投資回報比例?)

### **Vocational Context**

#### **職業環境**

58. What is the nature of your company's business? (請您描述您公司的業務特點。)

59. Is your company proactive in employee business English or vocational English training? (您的公司對於員工商務英語或職業英語培訓是否積極?)

60. What is the human resources training and development policy specially designed for *EOP* training, on salary increases or career development? (對於職業英語培訓設定的人力資源培訓發展政策是哪些，比如工資的增長或職業發展?)

61. Does the company allocate special funds for *EOP* training in the workplace? (對於職業英語培訓課程公司是否有專項基金?)

62. How do you encourage your employees to continue learning English in their spare time? (您如何鼓勵員工在空餘時間繼續學習英語?)

63. Do you organize activities related to workplace English learning, such as English Corner? (您是否組織與職業英語學習有關的活動，比如英語角?)

64. Do you encourage your employees to watch English movies or undertake any other activities for learning purposes? (您是否鼓勵員工以學習為目的觀看英語電影或參加任何其它活動?)

65. Are your employees motivated to learn *EOP* in the workplace? (您的員工是否有動力在職場學習職業英語?)

66. Have you observed any changes in performance of the work and attitudes toward learning *EOP*? (您有無觀察到工作表現的變化和學習職業英語的態度轉變?)

67. What issues or concerns do you have, if any, about the future of the program for occupational learners in your institution? How do you envisage the English program for occupational learners at your institution five years from now? (有關你們的職業英語課程今後的發展，您有何關心的問題？您如何預見5年內的職業英語課程?)



## Appendix 5: Interview Questions (Policy Makers)

Name of Interviewer \_\_\_\_\_

Date \_\_\_\_\_

Name of Interviewee \_\_\_\_\_

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### Sample In-depth Interview Guide

“Good morning, I am \_\_\_\_\_ (introduce self).”

“This interview is being conducted to get your input about *English for Occupational Purposes* training in the workplace. I am especially interested in your views with regard to workplace *EOP* program delivery.”

“If it is okay with you, I will be audio recording our conversation. I am doing so to get all the details as I carry on an attentive conversation with you. I assure you that all your comments will remain confidential. I will be compiling a report, which will contain all staff comments without any reference to individuals. If you agree to this interview and the recording, please sign this consent form.”

“I’d like to start by having you briefly describe your responsibilities and involvement thus far with workplace *English for Occupational Purposes* training.” (*Note to interviewer: You may need to probe to gather the information you need.*)

“I am now going to ask you some questions that I would like you to answer to the best of your ability. If you do not know the answer, please say so.”

### **Training Needs in the Market**

#### **培訓市場需求**

1. In your view, what types of companies will need *EOP* training in the market?

Joint ventures? MNCs? SOEs? (在您看來，市場上什麼類型的公司需要職業英語培訓，合資企業/跨國公司/國企?)

2. How many corporate training centers/employment training centers/private training organizations are providing business English or *EOP* training programs?

Can you name a few training organizations or corporations that worked particularly well at providing workplace *EOP* training programs? (有多少個公

司培訓中心/僱傭培訓中心/私人培訓機構在提供商務英語或職業英語課程?

您能否說出幾個在提供企業職業英語培訓課程中做得特別出色的?)

(Notes to interviewer: You may need to probe to gather the information you need.)

3. What are the preferred learning styles and strategies for employees learning English in China's workplaces? (您認為中國員工職場英語學習偏好的學習

風格和策略有哪些?) (Notes to interviewer: You may need to probe to gather the information you need.)

4. What do you think is the preferable mode for China's workplace? A formal traditional class-based teaching model or a flexible, autonomous way of learning? (您認為中國職場員工偏好的學習模式是哪種？正式傳統的課堂教學模式還是自主學習的方法?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

5. Compared with academic English or traditional English, what kinds of English are being used in Chinese companies? How important is *EOP* to employees in China's workplaces? How important is an employee's level of *EOP* proficiency in helping Chinese businesses succeed? (與學術英語或傳統英語相比，中國公司使用哪種類型的英語？中國員工的職業英語水準對於幫助中國企業成功有多重要?)

6. What are the government-stipulated language policies for adult continuous education, especially for workplace education in China? Are China's Five Vocational English Standards implemented in its workplaces? (中国政府对于成人的继续教育特别是中国的职场培训是否有特设的语言政策？中國職業英語等級標準是否運用到企業中了?)

7. Do companies often use TOEIC to evaluate employees' business communicative competence? What are your views? (公司是否經常使用美國托業考試評估員工的商業溝通能力?您有什麼看法?)
8. What are the major benefits of *EOP* training to companies? (公司進行職業英語培訓的主要益處有哪些?)
9. How does *EOP* training in the workplace promote sustainable livelihoods in China? (職業英語培訓如何促進中國的可持續生計?)
10. How does *EOP* training promote skills development for employability in China? (職業英語如何促進中國員工就業技能發展?)
11. How can *EOP* training facilitate China's business globalization? (職業英語培訓如何促進中國商業全球化?)
12. How does *EOP* training in the workplace facilitate long-term corporate human capital development? (職業英語培訓如何促進公司的人力資本發展?)

### **Student**

#### **學生**

13. How can you account for the market of *EOP* training in China's workplaces? Do you have some specific figures in terms of the value workplace *EOP* training programs can create? (您如何預估職業英語培訓的市場價值? 您有沒有具體的數字有關職業英語培訓課程能創造多少價值?)

14. What are the greatest benefits to employees for undergoing *EOP* training in the workplace? Will they be promoted or have their salaries increased after the training? (對於員工職業英語培訓的主要益處有哪些，工作或職業成功，工資增長或升職?)
15. What is the most cost-effective way of learning *EOP* in the workplace? (在職場學習職業英語最經濟有效的方法有哪些?)
16. What difficulties do employees experience in learning *EOP*? (學生學習職業英語遇到的主要困難有哪些?)
17. Is the language taught in *EOP* programs different from or the same as the language used in daily work? (職業英語課程教授的語言與日常工作中使用的語言不同還是相同?)

## **Trainers**

### **培訓師**

18. Do you have some examples of "good practice" workplace *EOP* training programs? (對於優秀的職業英語培訓課程您能否舉一些例子?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

19. What qualifications should *EOP* trainers have for the workplace programs?

(職業英語課程培訓師需要什麼資質?)

20. What are the most effective teaching methods for workplace *EOP* programs?

(職場英語培訓課程最有效的教學方法是什麼?)

21. What are the most often-used materials for workplace *EOP* programs? (職

場英語培訓課程常用的材料有哪些?)

22. What roles do teachers play in workplace *EOP* training: facilitator, consultant, a change agent or simply an instructor? Do teachers often provide

business communication consulting services to the companies? (職業英語培訓

課程中教師扮演什麼角色: 推動者, 諮詢師, 變革推動者或僅是講師? 教

師是否提供商业沟通咨询服务予公司?)

## Workplace Training Effectiveness

### 職場培訓有效性

23. How often and in what ways can workplace *EOP* training programs be evaluated? Do you have matrix of quality assurance principles to guide the process? (職業英語培訓課程如何評估？您是否有品質保證原則來引導這個過程?) (*Note to interviewer: You may need to probe to gather the information you need.*)

24. Have you organized ongoing training for teachers for the workplace *EOP* programs and in what ways? Please explain. (您是否正在組織職場英語培訓課程的教師培訓？以什麼方式？請解釋。)

25. How are good practices embedded in future workplace *EOP* programs? (優秀的職業英語培訓方法如何融入今後的課程中?)

26. Is there any information about the impact of the program that you think would be useful for me to know? What are the major benefits of conducting *EOP* training in the workplace for your company? (有關職業英語課程的影響您有沒有一些實用的資訊?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

27. In what respects can workplace *EOP* training programs improve job performance in an English-medium environment? (從哪些方面看職業英語培訓課程能提高員工在英語環境中的表現?)

28. In what respects can workplace *EOP* training programs promote business growth? (從哪些方面職業英語課程能提高促進企業增長?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

29. Are training materials such as textbooks and handouts sufficient and effective in achieving the learning outcomes? If not, do you have some additional suggestions? (培訓材料(比如教材和講義)是否充分有效以達到學習效果?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

30. What do you think of the training activities for the *EOP* programs? Are they sufficient and effective in achieving the learning outcomes? (您認為職業英語培訓活動怎樣? 是否充分和有效以達到學習效果?) (*Notes to interviewer: You may need to probe to gather the information you need.*)

31. What do you think of the training methods for the *EOP* programs? Are they efficient and effective for the participating employees? (您認為職業英語課程的培訓方法如何? 對於參與員工來說是否高效和有效?) (*Notes to interviewer: You may need to probe to gather the information you need.*)



32. How effective are the workplace *EOP* training programs in improving employee job performance with regard to the international business communication activities in your company? (職業英語課程對於提高員工在國際商業活動中的表現有多有效?)

33. Can workplace *EOP* training programs facilitate the development of relationships with overseas customers and suppliers? (職業英語培訓課程是否能夠幫助企業進一步發展與海外客戶和供應商的關係?)

34. How do you measure the contribution of *EOP* training in the workplace to business growth in financial terms? (您如何從財務角度衡量計算職場職業英語培訓課程對於商業增長的貢獻?)

35. What issues or concerns do you have, if any, about the future of the program for occupational learners in your institution? How do you envisage the English program for occupational learners at your institution five years from now? (有關你們的職業英語課程今後的發展，您有何關心的問題？您如何預見五年內的職業英語課程?)

36. Have you observed any changes in performance of the work and attitudes toward learning *EOP*? (您有無觀察到工作表現的變化和學習職業英語的態度轉變?)

## Vocational Context

### 職業環境

37. What kinds of activities particularly need employees to have international business communicative competence? (什麼樣的活動特別需要員工具備國際商務溝通能力?)

38. Are companies in China proactive in employee business English or vocational English training? (中國公司對於員工商務英語或職業英語培訓是否積極?)

39. What is the human resources training and development policy specially designed for *EOP* training, on salary increases or career development? (職業英語培訓特定的人力資源培訓和發展政策有哪些，比如工資增長或職業發展?)

40. Does the company allocate special funds for *EOP* training in the workplace? (公司對於職業英語培訓是否會有專項基金?)

41. How do companies encourage employees to continue learning English in their spare time? Are employees motivated to learn English in the workplace? (公司如何鼓勵員工在閒暇時間繼續學習英語？員工是否有動力在職場學習英語?)

## Appendix 6: Interview Questions (Workplace *EOP* Learners)

Name of Interviewer \_\_\_\_\_

Date \_\_\_\_\_

Name of Interviewee \_\_\_\_\_

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### Sample In-depth Interview Guide

“Good morning, I am \_\_\_\_\_ (introduce self).”

“This interview is being conducted to get your input about *English for Occupational Purposes* training in the workplace. I am especially interested in your views with regard to workplace *EOP* program delivery.”

“If it is okay with you, I will be audio recording our conversation. I am doing so to get all the details as I carry on an attentive conversation with you. I assure you that all your comments will remain confidential. I will be compiling a report, which will contain all staff comments without any reference to individuals. If you agree to this interview and the recording, please sign this consent form.”

“I’d like to start by having you briefly describe your responsibilities and involvement thus far with workplace *English for Occupational Purposes* training.” (*Note to interviewer: You may need to probe to gather the information you need.*)

“I am now going to ask you some questions that I would like you to answer to the best of your ability. If you do not know the answer, please say so.”

### **Student Learning Needs**

#### **學生學習需求**

1. What is the nature of your company's business? (您的公司主要從事什麼業務?)
2. What is your department concerned with? (您的部門與什麼工作有關?)
3. What is your role in the company/department? (您在公司/部門從事扮演什麼角色?)
4. How important is *EOP* to employees in China's workplaces? (職場英語在中國的公司工作有多重要?)

### **Writing Needs and Difficulties**

#### **書寫需求和困難**

5. What kinds of documents do you produce as part of your job function in English? (作為您工作職能的一部分您需要準備什麼樣的英文檔?)
6. What is the purpose of these documents in English? (這些英文檔的用途是什麼?)

7. Who are the readers of these documents in English directly and indirectly?

(誰是這些英文檔的讀者-直接的和間接的?)

8. Please provide samples of (請提供樣本):

(i) Your preferred in-house style in English(您喜好的公司英文文書體例); and

(ii) Samples of your own writing that you have produced as part of your job

(both good and bad) in English. (您的好和差的英文工作文書樣本)

9. What are the difficulties that you face when creating the work-related

documents in English that you have mentioned? (您準備這些與工作相關的英

文檔樣本時遇到哪些困難?)

### **Oral Communication Needs and Difficulties**

#### **口頭交流需求和困難**

10. What kinds of oral presentation/interactions in English do you make as part

of your job function? (作為您工作職能的一部分您會做什麼樣的英文陳述或

交流?)

11. What is the purpose of the oral communication in English? (這些英文口頭

交流的目的是什麼?)

12. Who listens to the oral presentation/interaction in English? (英文陳述或交

流的聽眾是誰?)

13. Please provide:

(i) Your company's or department's in-house guidelines for oral presentations/interactions/meetings in English (請提供您的公司或部門的英文口頭演講/互動/會議指引); and

(ii) Samples of your own oral communication that you have produced as part of your job in English (both good and bad). (您工作中成功和失敗的口頭溝通樣本)

14. What difficulties do you face when performing the work-related English oral communications that you have mentioned? (您做與工作相關的英文口頭交流時有哪些主要的困難?)

### **Student Attitude and Motivation: Level of commitment**

#### **學生的學習態度和動機：努力程度**

15. How many hours are you prepared to spend on this course and when? Are you also prepared to put in effort during non-contact hours if necessary? (您準備在課程上化幾個小時?在什麼時候? 您是否在非上課時間也努力學習?)

16. Have you ever asked or been asked to bring work-related materials to the class? (您是否被要求將與工作有關的材料帶到課上?)

If so, indicate the types of materials (如果是, 是哪些材料):

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17. Do you want to improve your English for salary increase, career growth, or promotion?

(您需要提高英語是為了加工資，職業提升還是升職?)

### **Teachers**

#### **教師**

18. Are the following related to an effective/successful workplace English class? To what extent? (以下一些因素與有效的/成功的職場英語課程是否相關?在何種程度上?)

Meeting learner's needs (滿足學習需求); Continuous teacher training (持續的教師培訓); Incorporating multimedia (使用多媒體); Developing customized materials (量身製作材料); Tailored training approaches (量身製作培訓方法); Learning transfer (學習成果轉化); Evaluating instruction (評估教學過程);

19. Please describe your typical workplace English class. What kind of classroom activities do you use and how are the activities structured? (請描述一堂典型的職場英語課。你們做了什麼樣的課堂活動? 課堂活動是如何組織的?)

20. Which classroom activity do you think is most relevant to improving workplace performance? Why? (哪個課堂活動與工作最相關? 為什麼?)

21. Do you prefer to use textbooks, handouts, PowerPoint presentations, or other materials in the workplace *EOP* training programs? (您喜歡職場英語培訓中的哪些材料?)

22. How can the materials be tailored to specific business/industry/occupational needs? (教材，講義，幻燈或其它？材料如何改變以適合特定的商業/行業/職業需求?)

23. Have you participated in job-related training in other subjects? (有沒有參加過與工作相關的其它主題培訓)

Yes (是)\_\_\_\_\_ No(否) \_\_\_\_\_

If yes, please explain\_\_\_\_\_.

(如果有,請解釋\_\_\_\_\_.)

24. Which types of training have you participated in? (你參加過哪些類型的培訓? Orientation Training 入職培訓/Technology Training 技術培訓/ Ethics Training 職業道德培訓 / Workplace Communication Training 職場溝通培訓 / Leadership Training 領導力培訓 / Teacher Training 教師培訓/ Other 其他)



25. Can the training methods for job-related training in other subjects applied to workplace *EOP* training? (其他的工作相關的主題培訓方法能否運用到職場英語培訓上?)
26. What do you think is the preferable mode for workplace *EOP* courses for your employees? A formal traditional class-based teaching model or a flexible, autonomous way of learning? (您偏好職場英語培訓的方法是正式的傳統的課堂教學模式還是靈活自主地學習方式?) (*Note to interviewer: You may need to probe to gather the information you need.*)
27. What is the typical training method you have found in the workplace *EOP* training program? (在職場英語培訓中，您認為典型的培訓方法是哪種?)
28. Do you like tutorial/workshop/mentoring formats? (您喜歡小組輔導/工作訪/輔導式的培訓方法?)
29. How often are workplace *EOP* courses learning centered, collaborative, experiential, reflective, and learning team based? (多常職場英語課程是以學習為中心的，合作性的，體驗式的，反思式的和學習團隊導向的?)
30. In which situation/topic would a skills-based or micro-training approach be effective? (什麼情境/話題適合使用技能或微格培訓比較有效?)

31. Would *EOP* training in occupational or task settings be delivered by using simulations, conversations, cases or specialized methods to develop global business communicative competence? (您是否會用職業或任務場景，通過模擬，會話案例和特定方法培訓商務溝通能力?)

32. In which situation/topic would situated learning, technology-enhanced learning, action-based learning, authentic task engagement, mentoring, coaching or apprenticeship be effective? (哪些情境/話題適合使用情境學習，技術提升學習，行動學習，模擬任務模擬，輔導，教練式或學徒式學習比較有效?)

33. In which situations/topics would the trainer specifically construct learning and training climates, tailor workplace-learning curriculums, and select instructional media? (哪些情境/話題適合使用職場培訓和學習的方法包括建立學習和培訓氣氛，量身訂制職場學習課程，選擇教學錄影，模擬比較有效?)

### **Workplace Training Effectiveness**

#### **職場培訓的有效性**

34. Do you think the workplace *EOP* training courses can help you effectively develop global communicative competence? (你認為職場英語培訓課程能有效幫助你提高國際商務能力嗎?)

35. Is the language taught in *EOP* programs different from or the same as the language used in daily business? (職場英語培訓的語言與您工作所需語言不同或相同?)

36. What concerns have you had or have heard about regarding the availability of the materials or equipment? (有關材料或設備,你關心哪些問題?)

37. Are training materials such as textbooks and handouts sufficient and effective in achieving the learning outcomes? If not, do you have some additional suggestions? (培訓的材料,即教材,講義是否足夠有效以達到學習效果?) (*Note to interviewer: You may need to probe to gather the information you need.*)

38. What do you think of the training activities for the *EOP* programs? Are they sufficient and effective in achieving the learning outcomes? (培訓活動怎麼樣?是否足夠有效以達到學習效果?) (*Note to interviewer: You may need to probe to gather the information you need.*)

39. What do you think of the training methods for the *EOP* programs? Are they efficient and effective for the participating employees? (職業英語課程的培訓方法您認為是否合適?是否有效和高效?) (*Note to interviewer: You may need to probe to gather the information you need.*)

40. Are you able to acquire global business communicative competence on-the-job concurrent to the authentic tasks? (你是否能夠在真實的活動中同時培養國際商務溝通能力?) (*Note to interviewer: You may need to probe to gather the information you need.*)
41. How effective are the workplace *EOP* training program in improving your job performance with regard to the international business communication activities in your company? (職場英語培訓課程在提高你們公司的國際商務活動表現上有多有效?)
42. How can *EOP* training in the workplace promote sustainable livelihoods in China? (職場英語培訓如何促進中國的可持續生計?)
43. How can *EOP* training promote skills development for employability? (職場英語培訓如何提高就業能力發展?)
44. How can *EOP* training facilitate business globalization? (職場英語培訓如何促進商業全球化?)
45. How does *EOP* training in the workplace facilitate long-term corporate human capital development? (職場英語培訓如何促進企業人力資本發展?)

46. How do you measure the contribution of *EOP* training in the workplace to business growth in financial terms? (如何從財務角度衡量職場英語對企業增長的貢獻?)
47. How do you calculate the cost benefit ratio and return on investment ratios for the *EOP* training programs in your company? (如何計算您公司職場英語培訓課程的成本收益比和投資回報比?)
48. Do you prefer continuing learning English after completing the program? (課程結束後你會否繼續學習英語?)
49. Is your business benefiting from your improvement in global business communicative competence? (你在國際商務溝通能力上的提高能否使你的業務受益?)
50. Do you still need translation to understand machinery training in English? (你是否還需英語翻譯以理解機械培訓?)
51. Do you still need translation services for the English machinery operation manual for employees to understand? (你是否還需翻譯以理解英語的機器操作守則?)
52. Are your business email writing and oral communication better than before? (你的商務郵件寫作與商務口頭溝通是否好於從前?)

53. How can workplace *EOP* training help your company facilitate the development of relationship with overseas customers and suppliers? (職場英語培訓如何幫助你的公司進一步開發海外客戶和供應商的關係?)
54. What issues or concerns do you have, if any, about the future of the program for occupational learners in your institution? How do you envisage the English program for occupational learners at your institution five years from now? (有關你們的職業英語課程今後的發展，您有何關心的問題？您如何預五年內的職業英語課程?)
55. How are good practices embedded in future workplace *EOP* programs? (優秀的職業英語培訓方法如何融入今後的課程中?)
56. Have you observed any changes in performance of the work and attitudes toward learning *EOP*? (您有無觀察到工作表現的變化和學習職業英語的態度轉變?)
57. Is there any information about the impact of the program that you think would be useful for me to know? What are the major benefits of conducting *EOP* training in the workplace for your company? (有關這個課程的影響，您是否有一些有用的資訊?) (*Note to interviewer: You may need to probe to gather the information you need.*)

58. In what respects can workplace *EOP* training programs improve job performance in an English-medium environment? (這個職業英語培訓課程如何幫助學習者在英語為工作語言的環境中工作?)

59. In what respects can workplace *EOP* training programs promote business growth? (還有哪些其他方面職場英語培訓課程能夠幫助到公司增長?) (*Note to interviewer: You may need to probe to gather the information you need.*)

### **Vocational Context**

#### **職業環境**

60. Is your company proactive in business English or vocational English training? (你們公司積極推廣商務英語或職業英語培訓嗎?)

61. Is there management support for learning *EOP* in the workplace? (管理層是否支援職場英語的學習?)

62. Do you organize activities related to workplace English learning, such as English Corner? (你是否組織與職場英語有關的活動，比如英語角?)

63. Do you watch English movies or undertake any other activities for learning purposes? (你是否以學習為目的觀看英語電影學習或參加任何其它活動?)

## Appendix 7: Survey of Workplace *EOP* Learners' Language Learning

### Style, Strategy, Aptitude and Personality

(職業英語學習者語言學習風格，策略，能力和性格調查)

#### Part One (第一部分)

##### Student Profile

(學生基本資訊)

Gender (性別)..... Age (年齡)..... Company Name (公司名稱

).....

Department (部門)..... Job Title (職位

).....

Education/professional qualifications (教育/專業資質

).....

Years of Work Experience (工作經歷年份)

Please Tick (請選擇)

☐ 0 ~ 3 years(年) ☐ 4~ 6 years(年) ☐ 7 ~ 10 years(年) ☐ 11 ~ 13 years(年)

☐ 14~ 16 years(年) ☐ 17~ 20 years(年) ☐ 21 years(年) and above (及以上)

Years of Learning *English for Occupational Purposes* (學習職業英語的年限)

Please Tick (請選擇)

☐ 0 ~ 3 years(年) ☐ 4~ 6 years(年) ☐ 7 ~ 10 years(年) ☐ 11 ~ 13 years(年)



☐ 14~ 16 years(年) ☐ 17~ 20 years(年) ☐ 21 years(年) and above (及以上)

Percentage of Salary Increase after *EOP* Training

(職業英語培訓後工資增長百分比

%) .....

Times of Job Promotion after *EOP* Training

(職業英語培訓後升職次

數).....

### **Student Learning Style**

(學生學習風格)

1. What are your learning styles for *EOP*? (您的職場英語學習風格是什麼?)

.....

2. Do you prefer to learn language in the workplace and apply in your job?

Please explain. (您是否喜歡在職場學習語言並用於工作中? 請解釋。)

.....

3. Do you prefer to learn language off site? Please explain. (您是否喜歡工作外

學習語言? 請解釋。)

.....

### **Student Learning Strategy**

(學生學習策略)

4. What are your most often used language learning strategy for *EOP*? (您通常使用職場英語學習策略是什麼?)

.....

5. What do you think are the most effective/efficient/useful/popular learning strategy for *EOP* in the workplace? (您認為學習職場英語最有效/高效/有用/流行的學習策略有哪些?)

.....

### **Student Language Aptitude Self-Assessment**

(學生語言能力自測)

6. In terms of general English language proficiency now, where would you place yourself on a 4-point scale, representing the levels from beginner, lower intermediate, upper intermediate to advanced? (英語語言的水準您在哪一個級別，1-4 代表初學水準，中下水準，中上水準至高級水準?)

1		2		3		4	
---	--	---	--	---	--	---	--

7. With regard to the documents you want to write, where would you place yourself on this same scale now? (您準備的文本，您自測在哪個級別, 4 表示最高水準?)

1		2		3		4	
---	--	---	--	---	--	---	--

8. With regard to the oral communication you want to make, where would you place yourself for the same scale? (您的口頭溝通能力，您自測在哪個級別, 4 表示最高水準?)

1		2		3		4	
---	--	---	--	---	--	---	--

## Part Two 第二部分

**風格分析調查(SAS): 評估您的個人學習和工作風格**

**(Style Analysis Survey: Assessing Your Own Learning and Working Styles)**

Source: Oxford, R. L. (1993). Style Analysis Survey (SAS): Assessing your own learning and working styles. In J. R. Reid (Ed.), *Learning styles in the ESL/EFL classroom*. (Appendix A, p208-217). Boston: Heinle & Heinle;  
Translation in Chinese by XIE Qing (2011).

**PURPOSE (目的):**

The SAS is designed to assess your general approach to learning and working.

It does not predict your behavior in every instance, but it is a clear indication of your overall style preferences. (SAS 的設計意圖為評估您的通用學習和工作方式。這不能預測任何情況下您的行為，但是能夠清楚指出您的整體風格偏好。)

**INSTRUCTION (指令):**

For each item circle the response that represents your approach. Complete all items. There are

five major activities representing five different aspects of your learning and working style. (請圈出每項代表您的方式的選項。完成所有題項。共有五項活動代表您工作學習風格的五個方面。)

**TIMING (時間):**

It generally takes about 30 minutes to complete the SAS. Do not spend too much time on any item. Indicate your immediate response and move on to the next item. (完成 SAS 大約需要 30 分鐘。請不要在任何題項花去過多時間。請指出您的直接選項然後進入下一個題項。)

For each item, circle your immediate response: 0 = Never, 1 = Sometimes, 2 = Very Often, 3 = Always

(每一個題項，請圈出您的直接選項:0 = 從不, 1 = 有時候, 2 = 經常, 3 = 總是)

## ACTIVITY 1: HOW I USE MY PHYSICAL SENSES TO STUDY OR WORK

(活動 1:我如何用我的身體知覺學習或工作)

1. I remember something better if I write it down. (如果用筆寫下來，我會記憶得更好。)	0 1 2 3
2. I take lots of notes. (我做很多筆記。)	0 1 2 3
3. I can visualize pictures, numbers, or words in my head. (我可以在大腦中想像圖片，數位元和文字。)	0 1 2 3
4. I prefer to learn with video or TV more than other media. (比起其他媒體來,我更喜歡通過錄影或電視學習。)	0 1 2 3
5. I underline or highlight the important parts I read. (我會下劃或標亮閱讀中的重要部分。)	0 1 2 3
6. I use color-coding to help me as I learn or work. (我用彩色符號說明我學習或工作。)	0 1 2 3
7. I need written directions for tasks. (我需要任務的書面指令。)	0 1 2 3
8. I get distracted by background noises. (我受背景雜音干擾。)	0 1 2 3
9. I have to look at people to understand what they say. (我需要看著人們才能理解他們所說的。)	0 1 2 3
10. I am more comfortable when the walls where I	0 1 2 3

study or work have posters and pictures. (我工作或學習的牆上有海報和圖片時我更舒服。)	
11. I remember things better if I discuss them out loud. (大聲討論使我更好記住事情。)	0 1 2 3
12. I prefer to learn by listening to a lecture or a tape, rather than by reading. (我喜歡通過聽講座或磁帶學習，而不是通過閱讀。)	0 1 2 3
13. I need oral directions for tasks. (我需要任務的口頭指令。)	0 1 2 3
14. Background sounds help me think. (背景聲音幫助我思考。)	0 1 2 3
15. I like to listen to music when I study or work. (我喜歡學習或工作時聽音樂。)	0 1 2 3
16. I can easily understand what people say even if I can't see them. (我不用看也能容易理解人們所說的。)	0 1 2 3
17. I remember better what people say even if I can't see them. (即使我不看，也能更好記住人們所說的。)	0 1 2 3
18. I easily remember jokes I hear. (我更容易記住我聽到的笑話。)	0 1 2 3
19. I can identify people by their voices. (我能通過聲音辨別人們。)	0 1 2 3
20. When I turn on the TV, I listen to the sound more than watching the screen. (我打開電視時，我更多的聽聲音而不是看螢幕。)	0 1 2 3
21. I'd rather just start doing things rather than pay	0 1 2 3

attention to directions. (我寧可直接開始做事而不是先注意指令。)	
22. I need frequent breaks when I work or study. (我工作或學習時需要頻繁休息。)	0 1 2 3
23. I move my lips when I read silently. (我默讀時移動嘴唇。)	0 1 2 3
24. I avoid sitting at a desk when I don't have to. (不需要的時候我避免坐在書桌邊。)	0 1 2 3
25. I get nervous when I sit still too long. (我坐太久時會緊張。)	0 1 2 3
26. I think better when I can move around. (我走動時思考得更好。)	0 1 2 3
27. Manipulating objects helps me to remember. (操作物體能說明我記憶。)	0 1 2 3
28. I enjoy building or making things. (我喜歡建造或製作物品。)	0 1 2 3
29. I like a lot of physical activities. (我喜歡肢體活動。)	0 1 2 3
30. I enjoy collecting cards, stamps, coins, or other things. (我喜歡收集卡片，郵票，硬幣或其他東西。)	0 1 2 3

For each item, circle your immediate response: 0 = Never, 1 = Sometimes, 2 =

Very Often, 3 = Always

(每一個題項，請圈出您的直接選項: 0 = 從不, 1 = 有時候, 2 = 經常,

3 = 總是)

## ACTIVITY 2: HOW I DEAL WITH OTHER PEOPLE

(活動 2: 我如何處理他人)

1. I prefer to work or study with others. (我喜歡和其他人一起工作或休息。)	0 1 2 3
2. I make new friends easily. (我很容易交新朋友。)	0 1 2 3
3. I like to be in groups of people. (我喜歡和人群在一起。)	0 1 2 3
4. It is easy for me to talk to strangers. (我容易與陌生人交談。)	0 1 2 3
5. I keep up with personal news about other people. (我私自保留有關其他人的消息。)	0 1 2 3
6. I like to stay late at parties. (我喜歡在聚會中久留。)	0 1 2 3
7. Interactions with new people give me energy. (與新人互動給我能量。)	0 1 2 3
8. I remember people's name easily. (我容易記住人的名字。)	0 1 2 3
9. I have many friends and acquaintances. (我有很多朋友和熟人。)	0 1 2 3
10. Wherever I go, I develop personal contacts. (不論我去哪裡，我都建立聯絡關係。)	0 1 2 3
11. I prefer to work or study alone. (我喜歡獨自工作或學習。)	0 1 2 3
12. I am rather shy. (我非常害羞。)	0 1 2 3
13. I prefer individual hobbies and sports. (我喜歡個人愛好和體育。)	0 1 2 3
14. It is hard for most people to get to know me. (讓大多數人知道我很難。)	0 1 2 3
15. People view me as more detached than sociable. (人們看我更離群而不是愛社交的。)	0 1 2 3
16. In a large group, I tend to keep silent. (在一個大的人群中，我傾向於保持安靜。)	0 1 2 3
17. Gatherings with lots of people tend to stress me.	0 1 2



(與許多人聚會使我有壓力。)	3
18. I get nervous when dealing with new people. (我和新人打交道感到緊張。)	0 1 2 3
19. I avoid parties if I can. (我盡可能避免聚會。)	0 1 2 3
20. Remembering names is difficult for me. (我很難記住名字。)	0 1 2 3

For each item, circle your immediate response: 0 = Never, 1 = Sometimes, 2 =

Very Often, 3 = Always

(每一個題項，請圈出您的直接選項：0 = 從不，1 = 有時候，2 = 經常，3 = 總是)

### ACTIVITY 3: HOW I HANDLE POSSIBILITIES

#### (活動 3：我如何處理可能性)

1. I have a vivid imagination. (我有生動的想像。)	0 1 2 3
2. I like to think of lots of new ideas. (我喜歡有很多新的想法。)	0 1 2 3
3. I can think of many different solutions to a problem. (我能想到問題的很多不同解決方案。)	0 1 2 3
4. I like multiple possibilities and options. (我喜歡很多可能和備選。)	0 1 2 3
5. I enjoy considering the future events. (我喜歡考慮未來的事件。)	0 1 2 3
6. Following a step-by-step procedure bores me. (按部就班我覺得無聊。)	0 1 2 3
7. I like to discover things rather than have everything explained. (我喜歡發現事物而不是讓所有事都有所解釋。)	0 1 2 3
8. I consider myself original. (我認為我自己具有原創性。)	0 1 2 3

9. I am an ingenious person. (我是個有獨創性的人。)	0 1 2 3
10. It feels fine if the teacher or boss changes the plan. (如果老師或老闆改變計畫，我感覺自然。)	0 1 2 3
11. I am proud of being practical. (我為我的務實感到自豪。)	0 1 2 3
12. I behave in a down-to-earth way. (我以腳踏實地的方式表現。)	0 1 2 3
13. I am attracted to sensible people. (明智的人吸引我。)	0 1 2 3
14. I prefer realism instead of new, untested ideas. (我喜歡現實主義而不是新的，未經過檢驗的想法。)	0 1 2 3
15. I prefer things presented in a step-by-step way. (我喜歡按步驟呈現的事物。)	0 1 2 3
16. I want a class or work session to follow a clear plan. (我喜歡一堂課或一項工作程式遵照清晰的計畫。)	0 1 2 3
17. I like concrete facts, not speculation. (我喜歡具體的事實而不是猜想。)	0 1 2 3
18. Finding hidden meanings is frustrating or irrelevant to me. (找尋隱藏的意義使人沮喪或與我無關。)	0 1 2 3
19. I prefer to avoid many options. (我喜歡避免很多備選。)	0 1 2 3
20. I feel it is useless for me to think about the future. (我認為思考未來是無用的。)	0 1 2 3

For each item, circle your immediate response: 0 = Never, 1 = Sometimes,

2 = Very Often, 3 = Always

(每一個題項，請圈出您的直接選項: 0 = 從不, 1 = 有時候, 2 = 經常,

3 = 總是)

#### ACTIVITY 4: HOW I APPROACH TASKS

(活動 4: 如何執行任務)

1. I reach decisions quickly. (我很快做決定。)	0 1 2 3
2. I am an organized person. (我是個很有序的人。)	0 1 2 3
3. I make lists of things I need to do. (我需要做的事我會列出一張清單。)	0 1 2 3
4. I consult my lists in order to get things done. (為完成事情我會看清單。)	0 1 2 3
5. Messy unorganized environments make me nervous. (混亂無序的環境使我緊張。)	0 1 2 3
6. I start tasks on time or early. (我按時或提早完成任務。)	0 1 2 3
7. I get places on time. (我準時到達地點。)	0 1 2 3
8. Deadlines help me organize work. (最後期限說明我更好的組織工作。)	0 1 2 3
9. I enjoy a sense of structure. (我喜歡結構的感覺。)	0 1 2 3
10. I follow through with what I have planned. (我按照計畫進行。)	0 1 2 3
11. I am a spontaneous person. (我是個即興的人。)	0 1 2 3
12. I like to just let things happen, not plan them. (我喜歡只是讓事情發生而不是計畫它們。)	0 1 2 3
13. I feel uncomfortable with a lot of structure. (我對很多結構感到不舒服。)	0 1 2 3
14. I put off decisions as long as I can. (我盡可能推遲決定。)	0 1 2 3
15. I have a messy desk or room. (我有一個混亂的書桌或房間。)	0 1 2 3
16. I believe deadlines are artificial or useless. (我認為最後期限是假的或無用的。)	0 1 2 3
17. I keep an open mind about things. (我對事物保持開放的心態。)	0 1 2 3
18. I believe that enjoying myself is the most important thing. (我認為使我自己快樂是最重要的事。)	0 1 2 3

19. Lists of tasks make me feel tired or upset. (任務清單使我感到累或不安。)	0 1 2 3
20. I feel fine about changing my mind. (我對改變我的主意感到很自然。)	0 1 2 3

For each item, circle your immediate response: 0 = Never, 1 = Sometimes,

2 = Very Often, 3 = Always

(每一個題項，請圈出您的直接選項: 0 = 從不, 1 = 有時候, 2 = 經常,

3 = 總是)

## ACTIVITY 5: HOW I DEAL WITH IDEAS

### (活動 5: 如何處理想法)

1. I prefer simple answers rather than a lot of explanations. (我喜歡簡單的回答而不是很多的解釋。)	0 1 2 3
2. Too many details tend to confuse me. (太多的細節使我疑惑。)	0 1 2 3
3. I ignore details that do not seem relevant. (我忽視看上去無關的細節。)	0 1 2 3
4. It is easy for me to see the overall plan or big picture. (我容易看到宏觀的計畫或全域。)	0 1 2 3
5. I can summarize information rather easily. (我容易總結資訊。)	0 1 2 3
6. It is easy for me to paraphrase what other people say. (我容易複述別人的話。)	0 1 2 3
7. I see the main points very quickly. (我很快看到重點。)	0 1 2 3
8. I am satisfied with knowing the major ideas without the details. (我對於無需細節而知道主要的想法感到滿意。)	0 1 2 3
9. I can pull together (synthesize) things easily. (我可以容易地整合事件。)	0 1 2 3
10. When I make an outline, I write down only the key points.	0 1 2

(當我制定大綱時，我只寫下關鍵點。)	3
11. I prefer detailed answers instead of short answers. (我喜歡詳細的答案，而不是簡短的答案。)	0 1 2 3
12. It is difficult for me to summarize detailed information. (我很難總結詳細的資訊。)	0 1 2 3
13. I focus on specific facts or information. (我聚焦於具體的事實或資訊。)	0 1 2 3
14. I enjoy breaking general ideas down into smaller pieces. (我喜歡將大體的想法分解成更小的片段。)	0 1 2 3
15. I prefer looking for differences rather than similarities. (我喜歡尋找差異而不是相似性。)	0 1 2 3
16. I use logical analysis to solve problems. (我用邏輯分析解決問題。)	0 1 2 3
17. My written outline contains many details. (我的書面大綱包含很多細節。)	0 1 2 3
18. I become nervous when only the main ideas are presented. (我對於只呈現主要的想法而感到緊張。)	0 1 2 3
19. I focus on the details rather than the big picture. (我聚焦於細節而不是全域。)	0 1 2 3
20. When I tell a story or explain something, it takes a long time. (當我講故事或解釋事情時，會花很長時間。)	0 1 2 3

### Part Three

#### (第三部分)

### Strategy Inventory for Language Learning

#### (二語學習策略調查)

Source: Oxford R. (1989a). *Strategy Inventory for Language Learning*.

Alexandria, VA: Oxford Associates. (With Chinese Version for ESL/EFL Learners).

**never or almost never true of me**

means that the statement is very rarely true of you.

**usually not true of me**

means that the statement is true less than half the time.

**somewhat true of me**

means that the statement is true about half the time.

**usually true of me**

means that the statement is true more than half the time

**always or almost always true of me**

means that the statement is true of you almost always.

選項說明：

（幾乎）從不如此 — 表示該敘述幾乎完全不符合你(妳)的情況

很少如此 — 表示該敘述多半不符合你（妳）的情況

有時如此 — 表示該敘述差不多有一半符合你（妳）的情況

通常如此 — 表示該敘述多半符合你（妳）的情況

（幾乎）總是如此 — 表示該敘述幾乎完全符合你（妳）的情況

Example:

Question Item 1:

I think of relationships between what I already know and new things I learn in English.

1 ☐ never or almost never true of me

2 ☐ usually not true of me

3 ☐ somewhat true of me

4 ☐ usually true of me

5 ☐ always or almost always true of me

Note:

If you mark (1) ✓ never or almost never true of me, it means that you never think of relationships between what you already know and new thing you learn in English.

答題範例：

**問題 1：我會把新學的東西和已學過的部分做聯想**

說明：假如你(妳)選擇的答案為 (1) ✓ (幾乎)從不如此，表示你從不會把新學的東西和已學過的部分做聯想。

## **Memory Strategies**

**(記憶策略)**

**1. I think of relationships between what I already know and new things I learn in English. (我會把新學的東西和已學過的部分做聯想)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**2. I use new English words in a sentence so I can remember them. (我用新學的單字造句，以加深記憶)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**3. I connect the sound of a new English word and an image or picture of the word to help me remember the word. (我會把英文單字的發音和這個字形象或圖像聯想起來，以說明記憶)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)



**4. I remember a new English word by making a mental picture of a situation in which the word might be used. (我藉著想像使用某個英文字的可能狀況，來記憶那個單字 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**5. I use rhymes to remember new English words. (我利用相類似的發音來記憶英文生字)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**6. I use flashcards to remember new English words. (我使用單字卡來背英文生字 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**7. I physically act out new English words. (我用肢體語言來說明記憶單字 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**8. I review English lessons often. (我時常複習英文功課 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**9. I remember new English words or phrases by remembering their**

**location on the page, on the board, or on a street sign. (我靠英文單字或片語出在書上、黑板上、或路標上的位置來記憶)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**認知策略**

**10. I say or write new English words several times. (我會反覆練習說或寫英文生字)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**11. I try to talk like native English speakers. (我試著說得像以英文為母語的人一樣)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**12. I practice the sounds of English. (我練習英語發音)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**13. I use the English words I know in different ways. (我以不同的方式使用我所知道的英文字)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**14. I start conversations in English. (我嘗試以英文交談 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**15. I watch English language TV shows spoken in English or go to movies spoken in English. (我看英語發音的電視節目或電影)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**16. I read for pleasure in English. (我讀英文書報以作為娛樂、消遣 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually

true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**17. I write notes, messages, letters, or reports in English. (我用英文寫筆記、留言、寫信或報告)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**18. I first skim an English passage (read over the passage quickly) then go back and read carefully. (我先很快流覽英文片段，然後再回頭仔細研讀)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**19. I look for words in my own language that are similar to new words in English. (我看到英文單字時會想一想中文裡哪一個字有類似的意思)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually

true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**20. I try to find patterns in English. (我試著找出英文的句型)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**21. I find the meaning of an English word by dividing it into parts that I understand. (我把一個英文單字拆成幾個我認得的部份，以找出它的意思)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**22. I try not to translate word-for-word. (我避免一個字一個字翻成中文或英文)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**23. I make summaries of information that I hear or read in English. (我將所聽到或讀到的英文做摘要整理 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

### **Compensation Strategies**

**(補償策略)**

**24. To understand unfamiliar English words, I make guesses. (遇到不熟悉的英文字時，我會用猜的 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**25. When I can't think of a word during a conversation in English, I use gestures. (在英文對話時，如果突然有一個單字想不起來，我會利用比手劃腳來表達 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually

true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**26. I make up new words if I do not know the right ones in English. (當我想不出切的英文字時，我會自己發明新的單字 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**27. I read English without looking up every new word. (讀英文時，我不會每一個單字都去查字典 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**28. I try to guess what the other person will say next in English. (我會去猜測別人下一句要說的英文)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually



true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**29. If I can't think of an English word, I use a word or phrase that means the same things. (當我想不出某個英文字時，我會利用其它意思相通的字詞)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

### **Metacognitive Strategies**

(後設認知策略)

**30. I try to find as many ways as I can to use my English. (我會盡可能地找各種方式來運用我所學的英文)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**31. I notice my English mistakes and use that information to help me do better. (我會留意自己的英文錯誤，並利用它來改進)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**32. I pay attention when someone is speaking English. (當有人在說英文時，我會特別注意聽)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**33. I try to find out how to be a better learner of English. (我試著找出如何學好英文的方法)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**34. I plan my schedule so I will have enough time to study English. (我會訂定作息表，使自己有足夠的時間讀英文)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**35. I look for people I can talk to in English. (我會尋找可以和我講英文的人 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**36. I look for opportunities to read as much as possible in English. (我會尋找機會盡可能地讀英文 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**37. I have clear goals for improving my English skills. (我有明確的目標，決定要加強自己的英文 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**38. I think about my progress in learning English. (我會考量自己學習英文的進展)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

### **Affective Strategies**

**(情意策略)**

**39. I try to relax whenever I feel afraid of using English. (每當我害怕使用英文時，我會試著放鬆自己)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**40. I encourage myself to speak English even when I am afraid of making a mistake. (即使害怕犯錯，我還是會鼓勵自己說英文 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**41. I give myself a reward or treat when I do well in English. (每當我在英文上表現很好時，我會獎勵自己)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**42. I notice if I am tense or nervous when I am studying or using English.**

**(當我讀英文或說英文的時候，我會注意自己是否緊張 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**43. I write down my feelings in a language learning diary. (我在學習語言記錄本子上，寫下自己的學習心得)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**44. I talk to someone else about how I feel when I am learning English. (我會和別人討論自己學英文的感受)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

### **Social Strategies**

**(社會策略)**

**45. If I do not understand something in English, I ask the other person to slow down or say it again. (假如在英語會話時，我有聽不懂的地方，我會要求對方說慢一點或再講一遍)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually

true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**46. I ask English speakers to correct me when I talk. (說英語時，我會要求對方改正我的錯誤 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**47. I practice English with other students. (我會和其他同學練習英文 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**48. I ask for help from English speakers. (我會向講英文的人尋求協助 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**49. I ask questions in English. (我會發問以澄清和證實英文上的問題)**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)

**50. I try to learn about the culture of English speakers. (我試著瞭解英語系國家(說英文為主的國家)的文化 )**

(1) ☐ never or almost never true of me ((幾乎)從不如此) (2) ☐ usually not true of me (很少如此) (3) ☐ somewhat true of me (有時如此) (4) ☐ usually true of me (通常如此) (5) ☐ always or almost always true of me ((幾乎)總是如此)



## Appendix 8: Sample Interview Transcript

(Senior Executive in the Financial Industry)

Q: Thank you for taking part in this interview. I would like to start by having you briefly describe your responsibilities for some of the *English for Occupational Purposes* training programs for your company. And the information will be confidential and your name will be anonymous. Do you have some programs say Business English training for your employees in your department, in your company or in other department?

A: *Yes. The answer is yes. Actually, from our business need perspective, there are quite some demands for occupational or professional English training. Our training in our company and also in our department?*

Q: Yes.

A: *We quite often send people out for such kind of training, mostly hosted or arranged by HR for the department. They provided such kind of English capability training, primarily on the oral English speaking, professional English writing, oral English, something like how to prepare for a presentation in English and how to make a conference call, meeting in English etc. All these are quite helpful for our employees.*

Q: Yes. Your employees want to attend business English communication training because there are some practical job needs. This is the main reason for employees to attend the business English training.

*A: Yes. Reason No.1: I am working in a multinational company. English is our company language. So we have to manage all company communication, both written and oral in English. Reason No. 2: Most of our interactive communications are with our Head Office, Headquarters, both regional or global, are all in English. Also most of our business partners, like vendor, or our partners, their technical support guys, English is our company language. Reason No. 3 is actually most of our documentations except those for the regulatory bodies are all in English. We have to manage certain level of English capability.*

Q: So usually when employees completed the training organized by HR, what exactly do you think these people have learned by the end of the course or the program you have organized?

*A: Some like oral English training is generic training, with common purpose like how you handle conference call, how you communicate with people,*

*email courtesy, how to write a report etc. All these are quite the purposes for us to send people for training. We did not ask people to handle literary English but most is orally, and quite common English speaking and writing.*

Q: So your focus is on English writing and speaking in business context.

A: *Yes, very basic level in this context, not really like legal document or commercial document. Not really like. Most of our communications are quite technical requirements.*

Q: So the documents you would like to employees to produce are technical or commercial documents except the legal documents.

A: *Yes, you are right. Most of our documents are PCM, procedures, working process, documentation. All these are our first demand. My people in technology also have to produce their work related procedures documents in English. The second one is day to day communication with people they interact with, like external parties including vendors, customers etc. and also communication with head office, and also the global bodies. Third, is they should have a minimal understanding of commercial wording etc. And also I should say I am not asking my people to maintain the capability to write the commercial documents except the legal documents. But they should be able to*

*understand and see what it means by those terms, so that they retain the minimum requirement to produce those technical documents.*

Q: Thank you for your answer.

Do you think your employees have weaknesses in producing the documents?

*A: Of course, yes, very much. Firstly, you know English is not really the mother tongue of my people. They are all native Chinese. English is our second language. So the gap is quite obvious. It is quite hard to maintain them, to move to a higher level, to utilize English as a working language.*

Q: Regarding the oral communication, do you have some typical scenarios which you'd like people to present? You mentioned communication with Headquarters, and communication with vendors and suppliers.

*A: The most commonly used scenario is the conference call, in the retailing sections, with vendors or with head office, in technical discussion or project work, in customer handling or in resource coordination. This is the most common usage.*

Q: Regarding the oral communication, do you think these employees also have some weaknesses, compared with writing?

*A: Yes, the oral English is as I just said, is not our mother tongue. So the problem is our people really think in Chinese, not in English. So this is the obvious gap and the most difficult our staff have to handle, because they are not thinking in English. It is very difficult.*

*Q: It's more like their way of thinking is Chinese but they still have to speak English.*

*A: Yeah. They have to translate what they are thinking into what they have to speak. There is a lot of confusion and mistake. I think this is the most difficult.*

*Q: A hurdle to overcome.*

*A: Yes. I think the second is the environment. In China, actually even in the MNC, our day to day life, our people, my 1 down or 2 down level, I think 90% of the time, they are speaking in Chinese. They are always confused with Chinese.*

*Q: At your level, you always speak English?*

*A: Half, half. For me, when I talk to my regional guys, my time is spent half half with English and Chinese.*

Q: Thank you. Then how do you rate your employee's proficiency in *English for Occupational Purposes*? 1 is the lowest, 4 is the highest.

A: *My people or myself?*

Q: Your people, your employee, either your department or company.

A: *I think they are close to 2. So they are not yet up to the middle level.*

Q: With regard to writing the document, or the technical files, how do you rate your employee's performance?

A: *Writing is better. Actually, when they write something, they have the time to think, to make them more logical and presentable.*

Q: Regarding oral communication, like making conference calls, how do you rate your employee's performance?

A: *Oral is also 2. Or even 1. Sometimes between 1 and 2.*

Q: Oral skills have lower proficiency compared to writing.

A: *Yes. If you see email from my people, most of their English is good. But if you listen to them talk in English, you feel a lot worse.*

Q: How important is the level of English proficiency in the areas of reading listening speaking and writing? From not important at all to very important.

A: *I should say reading is important. Listening is average. Speaking is also average. Writing is important. Reading and writing, we always think it is black and white. Reading is what you understand. Writing is what you want others understand. These two is more like communication.*

Q: Oral communication is more often face to face talk.

A: *These oral communications can always be supplemented by writing and reading. So writing and reading is always more important. This is to accommodate our reality. For my people, it is comparatively easier for them to improve reading and writing other than listening and speaking. The latter requires quite a lot of environment.*

Q: So you often organize reading and writing training instead of speaking and listening?

A: *No. Of course I want to train people to move to an upper level, up to their excellence. But I often do one thing which is easier and more efficient. I would say reading and writing are easier compared to listening and speaking. If I can*

*do firstly writing and reading, second one is speaking and third one is listening.*

*But listening, comparatively easier.*

Q: So if it is your employee's training, probably they will have more speaking training which can enhance their level of English use? Or is it because speaking is more difficult, employees will have more training in speaking?

A: *Not really, to my people, to me the only purpose of communication is to exchange message or to share information, to understand in between. Mutual understanding is the only purpose. To understand each other, all these capabilities helped. So which is easier, more efficient, more accurate? Reading and writing are easier for Chinese. But speaking and listening are more difficult. To me, to train reading and writing is easier for them to improve communication. Listening and speaking is a little bit hard to my people.*

Q: Hard to get effective learning outcomes.

A: *Yes. If you ask me to put in sequence, I would say first training them writing and reading, second speaking and the last listening. Of course, speaking is important, but difficult to train. I would say return on investment (ROI) is very low. If we have limited resources, we do something easier.*



Q: Thank you. That's very helpful. Regarding the implementation of the program, what do you think are effective activities or techniques that can be applied to language training? Do your employees prefer that teacher talk all the time or do they prefer to have some activities in for example reading and writing?

A: *There are the technical training skills, which I have no idea. I think this is your expertise. You are professional trainer. You have to technically handle it. To my understanding, I prefer something quicker and easier to understand. For example, you can provide some format. Tell our people how to write in some kinds of templates. This is the thanks letter, for example. This is an information sharing letter. And this is an application letter. Put like 20 templates for my people. I think after these training, very effective, very efficient, my people will understand how to write these forms. This is much quicker than you coach them to let them have the feeling of English use. This is much quicker. I want something standard and to share some standard to our people.*

Q: That means the materials you use in the training is really important.

*A: Yes. As to your another question, what formality in the training, the trainer talk more or some interactive games, I would say of course interactive is more important and efficient, while it is more for oral English to have more interactions. Not really for writing and reading. I will think for reading and writing, you can teach specifically templates or some of the practical skills. For example, if you see a paragraph, how you very fast get to the point and look at the words like however. What does however mean? However means but, no, something opposite.*

**Q: Quick reading?**

*A: Yes, I would rather share such kind of skill. This is a very quick cure, so you can have people efficiently get to the point.*

**Q: In your view, what is a good practice workplace *English for Occupational Purposes* training program? Or technical English or occupational English? Do you have the definition?**

*A: Not really. I am not really good at English teaching. So I can only say what I think is more efficient. As I have just said, if you can provide the formality, practical reading, writing skill, it's far more standard. From my point of view, I am an IT service provider. My people's English communication, either reading,*

*writing or oral, we don't need something fancy. We don't need something literary. It's very standard. We want something very simple, clear and logical. This kind of training is what we want.*

Q: Regarding the training method, what is the most usual/effective/popular method found in some training programs? Like you mention teacher providing template. Do the teachers use role play? Do they let students have simulation?

*A: Yes, role play is a very good one. They arranged several competitions, different roles etc. I also heard many years ago from my ex-boss. If you want to improve your oral English, this is not related to occupational English, you really have to watch English movies. You must listen and read the subtitles. And from time to time, you don't look at the subtitles. You focus more on listening than reading. Then gradually your listening and speaking will improve a lot. This is a very interesting way of learning English.*

Q: Do you have some concerns, if your company is organizing some workplace technical English training, or if you are organizing, what issues do you have?

*A: Our big concern is if the trainer doesn't understand our business, for example, if the trainer doesn't understand what I want. My people want to*

*improve the kind of standard English. This standard is occupation related, like how to write business email, how to understand quicker English paragraph, how to read very quickly a commercial contract, how to make an introduction to a client, or others such as experts etc. So I want the teacher to understand much my needs before he or she starts the training.*

Q: Have you organized some job-related training in other subjects, like technical training, leadership training?

*A: This is English training. We have technical training, leadership training, soft skill training, how to handle conflicts etc. Quite a lot. And also workplace communication. For example, how you listen to people, how you convince people, how you compromise with people. We have arranged a lot of trainings.*

Q: Can the techniques in job-related training in other subjects be applied to English training? For example, can the training methods in workplace communication be applied to EOP training?

*A: I think most of the training follows the same methodology. Like, what is a training purpose, what is the method, and how you evaluate the training effectiveness etc. I think all of them follow the same procedure.*

Q: So regarding the factors, to what extent are the following related to an effective/successful workplace English class?

*A: Learner is our department employee? Learner has their personal needs, not necessarily aligned with our department needs. As to myself as a department leader, I sent people for training. I have specific needs. I think learner's need is limited.*

Q: Yes.

*A: A moderate extent for meeting learner's needs and incorporating multimedia. A great extent for developing customized materials, tailored training approaches, learning transfer and evaluating instruction.*

Q: Thank you. Regarding the learning style and strategy, what's preferred when they are learning reading, writing, speaking etc.? Say when they have training, do they prefer to have training on the job or offsite training?

*A: From employee's point of view, myself also wants to, I'd rather have the off-site training. If it is outside, I can very much focus, away from the disturbance. Second one I prefer face to face training. E-learning is my last*

*option. The only advantage of E-Learning is flexibility and it is standard. I mean the content is very much standard. The result is not really.*

Q: Can you measure how much time your employees spend on E-learning?

*A: Yes, you can. You can end up with a test. You can read the score. I talked to a lot of people. People don't buy E-learning. There can be a huge amount of programs on E-learning. Then you just lost. If it is face to face, then it can be at a particular time and place, and you only study this one.*

Q: Face to face training is also offsite. If I can for example come to your company and provide services on the job, would that be effective?

*A: On the job, is it in the office hours or none?*

Q: Office hours or Non-office hours.

*A: Office hour is the same. If you are dedicated, 2 hours in the morning from 9 - 11, English training, it's OK. It's dedicated. If it is on-the-job training, we have a lot of. While we are doing something and we do some training in the meantime, that's not good.*

Q: Employees will lose focus.

*A: You are right. We always think training is something that can be compromised.*

Q: If it's face to face training, do you prefer tutorial/workshop/mentoring?

*A: Tutorial means one on one. Workshop will be better.*

Q: Mentoring means one very senior coaches.

*A: Of course, in our company, we have two. More like workshop is one format.*

*Mentoring is also one. But mentoring depends very much on the mentor. How people the mentor is and how is the priority of the mentor? And it is the training focus. There are quite several.*

Q: Regarding the preference of formal classroom-based training or flexible, autonomous way of learning, do you think the flexible, autonomous way of learning is important? Say when learning financial English. Do you think it is important that employees can have some autonomy?

*A: If it is from my perspective, I see this from business perspective. I am sending people out, so I am very much caring about the result. To see from the result, I would say classroom-based teaching is more focused, dedicated and meet the demands of employees. And this one, flexible autonomous way of*

*learning very much relies on the employee's self-discipline, self-initiative. If he is not really responsible guy, he may not be listening.*

Q: Regarding the teaching method, do you sometimes use role play, simulations, or case studies, project work, oral presentations in your programs?

A: *Yes, case study is very important. I will say here case study is the most efficient one. Case is almost the most attractive to employees.*

Q: Do you sometimes use project as a training method? Project is a kind of training or learning task.

A: *Yes. I understand. Several people get together and we are physically executing a project. This is what we call on-the-job training. Of course, it is good. It requires quite a lot of skills to the trainer.*

Q: So, it is different from case study?

A: *I would say case study is more focused and dedicated as to the trainer. For project, sometimes people focus on the project work itself instead of learning. They are doing their job instead of learning. Therefore, I'd rather say it asked a lot more from the trainer.*



Q: So, how about oral presentations, as a kind of training?

A: *Yes, this is also very important.*

Q: In different context, you will require your employees to have presentation skills.

A: *Epecially in the MNCs. And also in the SOEs. That's why in our company there is a particular training called presentation skills, when people are out for the training of how to make a presentation.*

Q: Regarding other methods, do you encourage your employee to have collaborative learning or learning in a team?

A: *Yes, collaborative and learning team.*

Q: So, you mention training as skill-based. You organized training around different types of skills instead of reading writing speaking listening. That's more effective.

A: *You are right, because we have very specific demand, very specific purpose of training. So we have very specific topics. For example, how to do email*

*writing, or technical email writing, with specific formality. You start with the topic, and to discuss with the topic. What is the current situation? What is the uncertainty and disagreement? What are the options? What are my recommendations? And what's next level to do? This kind of sequence. Training like this is very effective. Not as general as writing in English. That's is too broad.*

Q: You need to have a specific focus in the training. Will you bring the authentic working scenarios into the training? Some real stories from the work?

*A: It's very much like case study. The real case is always closer to our life. That's why I would say the trainer has to know a lot about our real life. So if he or she can bring some real case, it will be very helpful for the training program.*

Q: Will you or HR Department organize some activities like English Corner to encourage employees to learn English after work?

*A: I would say our life is very difficult, because we don't have any spare time. There is just too much work. We really don't have any leisure time to study.*

Q: It's difficult to organize a climate or environment for learning English. You need to connect English with the job. That's more motivating for employees.

A: *Yes, if it is more specific, dedicated time, with specific topic, and dedicated people, we only do training, rather than something else.*

Q: Thank you. I still have some questions regarding learning outcome. From what aspect or how these workplace English training programs can help employees work in an English medium environment? Or do you think your employees can acquire some work-related communicative competence through these training programs?

A: *Of course, with these training, our people will improve their English capability, when they have their day to day job. It helps to gain them much more confidence with the English communication. This is one of the most favorable achievement you can expect from this kind of English training. Secondly, such kind of training will make our people better understand the methodology, including the concept and skills for doing business. Of course, this is a lot helpful.*

Q: Do you think your employees can acquire business English communication skills on-the-job?

A: *Of course, they can, but only to a certain level. If you really want them to move to a next level, handling this more effectively in an excellent way, you still have to organize formal training for them. Learning only by themselves cannot help them to achieve the goal, not enough.*

Q: In that aspect, do you think workplace English program can help the business grow?

A: *Yes, of course. The people capability improves. Then the people, the team, the company, an eventually the business will benefit from this.*

Q: So your employee capability will improve after these activities?

A: *Yes. From my observation, such kind of training not just English but other, conflict handling, presentation skills, I can see through occupational training, our people can improve significantly.*

Q: Do your employees continue learning English after the program completion?

A: *They continuously practice, but really learn, because this is their day to day*

*work. Not really a kind of learning, but they are using it. They practice a lot.*

*They are able to practice.*

Q: Regarding the outcomes in business English email writing, is employee having better performance?

A: *Yes, very obvious.*

Q: Do you have the test for them?

A: *After the training, normally they will have a test. This is how we evaluate them and how we push them. One of the training results is the performance.*

Q: Is your employees' business oral communication better?

A: *Yes.*

Q: Is your relationship with overseas customers and suppliers better?

A: *Yes, of course. I would say this is very critical and important tool to equip our people.*

Q: Thank you. I have some contextual questions. What is the nature of your company's business?

A: *Financial Industry.*

Q: Is your company proactive in business English or technical English training?

*A: We require our people before they join the company a certain level of professional capability. However we reckon we need to continuous training for this purpose. So we also provide such kind of training after work continuously.*

Q: Every year, just organize one?

*A: Yes, every year, we arrange the training, not always in English, but also other training.*

Q: Do you have special human resources training and development policy for English training or business skill training, such as salary increase or career development?

*A: First, the training has to be job related. Second, we see this kind of training as investment. Therefore, we only train the people with potential. Third, out of training, we expect people from more experienced level to be more mature and start to take bigger job or on a leadership post. This is what we expect from the training. Before all these points, role no 0, before everything, we reckon people doesn't know before they start. So we have to give them the training. This is our very basic understanding. We see training as very important.*

Q: Does the company allocate special fund for the training?

A: *Yes. We have fund. Of course, this has to be job related or work related.*

Q: Do you encourage your employees to learn English in the community?

A: *Yes. This is what we always encourage our people. But not really English Corner. English movie is a lot more fun. When they have spare time, holiday or weekend, they can watch English TV or movie, to get the chance to learn. But English Corner is for your spare time, people don't come.*

Q: In addition to training, what do you think are the effective learning method for employees at the workplace? Besides watching movie, is there any other effective learning method? Like reading magazine for financial industry? Or simply chatting with colleagues?

A: *I never think about this. This is really a tough question to me. Watching English TV, film, of course, talking to expatriates. Another is actively joining the technical session, which is in English. Or travelling around with foreigners.*

Q: But not on the job.

A: *On the job, I think you actively join the technical discussion, board meeting etc.*

Q: Basically, when your employee enters your company, they should have already got some English communication ability, so that you have the ability to work in English.

*A: But this is not enough. English is the very basic for communication. Before they join the company, the English ability is not working related. He or she still has to learn the working related English.*

Q: So are your employees motivated to learn English at the workplace?

*A: No. My observation is they are not really active. The reason is there is not really the motivation because they are able to handle their work more or less without very perfect English. They do not really need one. And if there is a better English or very professional occupational English capability, this helps. This makes life easier. This is not a must. They will need technical proficiency and financial knowledge. Because our (native) proficiency is not (in) English.*