

A Comparative Analysis of the Range of Language Schools in the Czech Republic

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Abstract: This article is focused on comparative analysis of the products of language schools in the Czech Republic. The aim is to analyze the range of services, identify the range of language school courses and explore dependencies between market/competitive factors that can influence the product strategy of language schools. The data presented in this article are derived from exploratory research. The research carried out included 80 language schools from the total number of about 600 language schools located on the Czech market. Due to data processing (binary dataset), we used especially non-parametric mathematical and statistical methods to test the hypotheses. The key findings are that (1) The size of the market affects the offer of language schools and affects the differentiation strategy; (2) The customer segment (in this case, corporate clientele) is related to product customization; (3) Most schools do not have a wide range of products. A minority of language schools apply a diversification strategy; (4) Most language schools do not take advantage of opportunities outside the education sector. The results of the research showed that language schools create specialized courses due to the size of the market and adapt their offer to corporate customers. In most cases, language schools follow a strategy of concentration and focus on the areas of individual and corporate language training.

Keywords: business model, corporate strategy, customization, diversification, language courses, market analysis

1 Introduction

The waning demand for language schools in the Central and Eastern European regions presents a substantive subject of inquiry that resonates significantly within the purview of academic scrutiny [31]. This phenomenon encapsulates a noteworthy confluence of multifaceted dynamics, wherein the language school market is profoundly influenced by technologically-mediated shifts, economic oscillations, intricate political variables, and substantial socio-cultural

transformations [33]. These collective forces have precipitated the erosion of extant business models within the language school sector, thereby compelling proprietors and managers to cogitate upon requisite operational adjustments and the conceptual re-framing of value delivery mechanisms. The consequent metamorphosis of the market paradigm and its consequential implications upon the structural underpinnings of language schools have served as a catalyst for the instigation of scholarly endeavours geared toward an exhaustive analysis of the product portfolios of language schools. The prevailing circumstances are emblematic of the interplay between empirical investigation and the pragmatic exigencies of the contemporary socioeconomic landscape. The discernible shift in consumer preference and its causative linkages to technological advancements, political transformations, and socio-cultural dynamics collectively furnish a fertile landscape for scholarly inquiry. The academic imperative herein is the comprehensive understanding of these intricate inter-dependencies and their synergistic role in reshaping the educational sphere.

At the same time, the importance of this study underlines the lack of scientific research that examines the existing business models of language schools in different contexts [11]. In light of this research gap, the forthcoming findings have the potential to expand knowledge about the business models of language schools. Thereby, improving our understanding of the nuances of the strategic processes that underlie the creation of their value propositions. Implicit in this effort is the prospect of uncovering discernible patterns in the provision of language education that potentially defines the trajectory of immediate shifts in emphasis towards higher value-added products and a market-oriented strategy in language schools. Beyond the theoretical discourse, these findings are poised to contribute substantially to our understanding of the complex interplay between product strategy, market dynamics, and educational imperatives. In addition, this research is intended to provide insights that could be a catalyst for potential innovation in language school business models. Additionally, it facilitates the development of products that more effectively adapt to evolving market demands.

2 Literature review

The assessment of the literature survey found that there has been hardly any study on language schools [11]. Therefore, when processing the literature search, we focused not only on the language schools and their offer but also on areas related to language schools (i.e. language schools' value proposition, language schools' courses, trends of language schools including digital technologies and online world, the business model of language schools, strategic approach to course development, etc.).

2.1 Value proposition and client's expectations

Only two articles dealing with the offer of language schools were found in the scientific databases. There are studies that deal with the perception of value from the perspective of students/clients, but these are not focused on the non-formal education sector. In one study, the authors investigated how students perceive changes in study programs and their impact on expected value from the students' perspective [29]. Many studies deal with the product offer of schools from the field of formal education ([4], [23]) or the digital transformation of schools and the impact of digitization on the offer of schools [8].

One scientific study examined the relationship between language schools' value proposition and their students' expectations [11]. Authors of this study discovered that the value proposition of schools and the expectations of their customers differ significantly. It was found out that the value proposition of schools and the expectations of their customers differ significantly. Unexpectedly, customers indicated that the preschool group course was a personalized offer (product). It is safe to assume that clients expect greater flexibility in adjusting schedules, educational plans, and resource levels for preschool age groups. The businesses' flexibility is severely constrained and that language schools overly standardize their product offerings. In terms of business model terminology, the ability of language schools to create products in relation to their customers impacts the services they provide. Client profiling received the most attention. The seasonality of demand for language school products and the possibility of replacements also impacts the supply of schools. As some studies show, there are differences between the value proposition of language schools and what clients perceive as value [12], [20]. This contradiction can be crucial for finding practical solutions in relation to the creation of a value proposition for customers.

The above shows the importance of aligning product development with customer needs to improve service delivery. This starting point will be further extended by testing the hypothesis SH1 that relates to the relationship between the range of courses offered and the size of the language school market. This assumption has not yet been tested in any empirical study, so the results of the testing can contribute to a deeper understanding of the value proposition depending on the size of the market. At the same time, the results of this testing can complement the current knowledge regarding the value map and customer profiling.

2.2 Digital technologies and their influence on the education

One study provide an insightful overview of the potential benefits of integrating computers into language education [35]. Authors of this study highlight the interactive nature of computer-based activities and the potential for personalized learning experiences. Another scientist delves into the foundational aspects of computer applications in second language acquisition, emphasizing the role of technology in teaching, testing, and research [2].

Digital technologies significantly influence the offer of language courses too. Distance learning is now more accessible thanks to the rapid development of technology [15]. According to another authors, online learning is a tool that helps make the learning process more flexible, innovative, and learner centered [30]. Online learning is learning synchronously or asynchronously while using internet-connected devices (such as laptops and cell phones). Students who are in a synchronous environment take part in live lectures, interact with teachers in real-time, and could receive immediate feedback. In an environment setting, educational material is available in various learning platforms and forums rather than live lectures or classes. Instant feedback and prompt action cannot be achieved in this environment.

E-learning includes numerous computer-assisted instructional techniques [22]. Software tools like MS Teams, Google Meet and Zoom have become helpful and advantageous during the most recent pandemic [25]. Technological advancements have made the delivery of online courses the norm [21]. Because it emphasizes collaboration, interaction, and independent learning and co-creates an effective learning process, teachers and students agree that such a shift catalyzes the entire learning process. It serves as an antidote to the dominant traditional pedagogical trends and approaches [5]. In the past, the teacher was the main focus of the learning process, but the online approach is student-centered [21]. Mobile language learning apps have gained prominence in recent years, allowing learners to engage with language content anytime and anywhere. In one study, the authors examine the integration of mobile phones in English education in Japan, showcasing the potential of mobile devices in providing flexible learning opportunities [34]. Another researchers expand on this by investigating the use of iPod touch devices for language learning, exploring how mobile technology can bridge formal and informal learning contexts [2]. The findings of another study supported the importance of online courses for high-quality education, and it also revealed that many teachers' core competencies include technical expertise [5].

The benefit of educational technology has increased interest in online courses [13]. An essential tool for raising student motivation and education is online learning. Students who take online courses perform better than those who prefer to interact with teachers and other students in a more conventional way [32]. Online learning has become more popular among college students, while traditional

learning has become less popular over time [6]. Online courses offer top-notch education.

Some studies address information technology's (ITC) effect on the educational process, continuing the digitization trend. The use of ICT for language learning is encouraged by a study by Bueno-Alastuey and López Pérez, which found that students had very positive perceptions of its usefulness [1]. The authors suggest adding guides and training to blended learning experiences to reduce the number of students who reject using ICT. Other authors have noted the propensity for task-based instructions that support online learning through digital tools to promote autonomous learning [9]. Teachers must devote significant time and effort to developing online courses that satisfy students' needs, like face-to-face instruction. The development of courses is significantly impacted by technology, notably e-learning. The benefits and challenges of incorporating new technologies into language learning are discussed [27]. Several factors support the use of technology in language instruction, including: 'engagement', 'improvement in academic ability', 'paradigm shift', 'assessment shift' and 'collaborative learning enhancement'.

However, some obstacles prevent using technology, such as 'lack of access', 'lack of time', 'lack of effective training', 'teachers' attitudes', and 'students' attitudes. Useful technological tools, approaches, and resources support teaching foreign languages by igniting students' innate desire to learn new languages and immerse themselves in foreign cultures. The results of some studies indicate that authentic, significant, interactive, student-centered, web-based learning activities like studying abroad and absorbing the local language and culture can enhance student performance [24]. It follows from the above text that the rise of mobile language learning apps has revolutionized language education, granting learners the flexibility to engage with language content at their convenience.

The underlying theoretical basis revolves around the transformative impact of technology, online learning's efficacy, and the potential of task-based and student-centered approaches to enhance language education. The trend of digitization of education, which is described in this part of the research, reveals possible shifts in the form and method of language school education. It follows from them that language schools should adapt their products and services much more. In this context, the empirical part of this work will therefore test the hypothesis SH2 regarding the customization of language school courses in the context of corporate education. The mentioned hypothesis is partly related to the use of modern information technologies, which language schools can use for the purpose of temporal and spatial adaptation to corporate customers.

2.3 Product/service strategy

The offer of language schools is also influenced by the optional product/service strategy. There are two basic approaches related to product strategy, which are customization and standardization. According to one study, there are various forms of customization. The authors of this study discuss how mass customization and other domains are related to it [18]. These authors say Critical Participatory Looping (CPL) allows for extensive customization. CPL allows for dialogical interaction between the teacher and the class, encouraging everyone to act as agents to develop their self-determination through action or agency [19]. The CPL procedure enables students to feel that they are meaningfully contributing to the class structure and that each one thinks "I am somebody" who possibly influences by being recognized by peers, instructors, administrators, and politicians [18]. However, some authors also note the opposite tendencies in creating educational programs.

The opposite of customization is standardization. The current movement in curriculum content has been at the fore since 2010, when education was under attack from a strong push toward standardization [16]. The Common Core State Standards are the manifestation of this. On the other hand, if the learning process is to be individualized, teachers need to be able to change curricula [16]. It is clear that efforts to diversify business also have an impact on the offer of language schools, but it is not entirely clear whether language schools tend to concentrate or diversify services. The current theory (as formulated by some researchers), the rule applies that the size of the market determines the choice of an appropriate portfolio strategy [14],[28]. A large market requires concentration, while a small market requires more product diversification [10].

Therefore, in the next part of the work, we will verify the assumptions whether language schools really tend to diversify services which is related to the formulated hypotheses SH3 and SH4, which we will present in the following section. From these hypotheses, we expect the verification of the initial assumptions related to the portfolio strategy of language schools. Our efforts within these hypotheses are related to the deepening of knowledge about customization and standardization, as well as about concentration and diversification. At the same time, as part of the testing, we will verify the initial theoretical assumptions regarding the strategic approach to the creation of service portfolios for one of the economic areas, which is the non-formal education sector (in this case, the language education market).

3 Methodology

The main objective of this empirical study is to analyze the products/services of language schools in the Czech language education market and to examine the existence of dependencies between selected market and competitive factors. Based on an analysis of products and services offered by language schools, whether there are statistically significant relationships between the different language school offers will be further investigated. The results of this study provide an overview of the product portfolio of language schools in the Czech Republic and present an analysis of language school products in the context of market size, customization, diversification, and services outside the education sector. Due to the nature of the research and with reference to the findings from the literature review, the four statistical hypotheses (SH) were formulated:

- SH1: There is a statistical relationship between the range of language school offer and market size.
- SH2: There is a statistical relationship between customized courses and corporate training.
- SH3: The most language schools (that means more than 50 %) have a wide range of products/services (i.e. more than eleven out of twenty-one offerings surveyed).
- SH4: The most language schools (that means more than 50%) offer translation services.

Research methodology reflects exploratory research. It allows describing the initial situation on the selected market from the perspective of language schools (the market's supply side). This research includes an investigation of the dependencies and proportions between the supply side of language schools. Furthermore, the range of language schools offered will also be investigated. In the first phase, to get an overview of language school products, the research was focused on the four most substantial language schools on the market (i.e. schools with the largest market share). The four strongest language schools were identified based on sales from 2017-2019. It was expected a wide range of products/services from these schools. The strongest schools were further examined with regard to the number and type of products. In this research phase, it was used internal firm materials (mission/vision statements, annual reports, etc.) and websites. Based on this analysis, it was found that language school leaders have a portfolio of 13 products. In the following research phase, research was focused on expanding the essential product portfolio of leading language schools. It was analyzed the product range of another eight language schools in the Czech Republic based on a random selection. The result of this analysis was the expansion of the original product portfolio from 13 to 21 language school

products. The resulting analysis of language schools in each region in the Czech Republic was possibly carried out to add to the original product list.

Data collection from publicly available information was applied to achieve the stated research objectives. The individual project researchers divided the market environment (the Czech Republic) into regions. Subsequently, five language schools were randomly selected from each region, except for the Central Bohemia and Prague regions, where ten language schools were selected from each. This atypical selection was mainly due to the high concentration of language schools in the capital city of Prague. Subsequently, from their publicly available information, information was entered into the dataset as to whether they offered a specific type of course in the data marked "1", whether the information was not found, or whether they did not offer the course was marked "0". It is, therefore, a database of binary data. Data collection took place in January 2021. The resulting data set was original and a primary data source. A total of 80 language schools in the Czech Republic were involved in the research (12 regions x 5 language schools /region + 2 regions x 10 language schools /region). The reason for such a relatively small dataset is the very narrowly specified research group (language schools, estimated from the CRIBIS database to number approximately 600 language schools), where it was impossible to obtain a large enough sample in some regions of the Czech Republic.

The data we summarized were then checked for outliers and missing values. Given a binary dataset, no indications of normal distribution were found in the data, and for that reason, mainly non-parametric statistical methods were used to test the hypotheses. Kendall tau correlation was used for dependency analysis, and z-test for proportions statistical tests were used to answer the research questions. We used R statistical software version 3.6.1 for overall data processing and statistical calculations.

4 Empirical results and discussion

The following table shows the initial data for the empirical analysis. The averages for each course type are discernible, representing the supply ratio of language schools in the context of binary data. Additionally, the median can be observed, indicating the course types with the highest representation in the mean. In this case, these are public courses, courses for companies, courses for children, individual courses, international exam certificates and online courses. Also, of interest are the kurtosis (spike) values, which show the ratio of the prevalence of offered/not offered type of course. These include in particular courses for the public, courses for the unemployed, courses for mothers and courses for the unemployed that appeared least frequently in the dataset.

Table 1
Range of language school products in the Czech Republic

	n	mean	sd	median	skew	kurtosis
Courses for public	80	0.96	0.19	1	-4.78	21.09
Courses for companies	80	0.82	0.38	1	-1.68	0.83
Courses for children	80	0.79	0.41	1	-1.38	-0.1
Courses for teachers	80	0.15	0.36	0	1.92	1.72
Courses for seniors	80	0.14	0.35	0	2.07	2.3
Courses for the unemployed	80	0.01	0.11	0	8.61	73.07
Summer courses	80	0.34	0.48	0	0.67	-1.56
Graduation courses	80	0.42	0.5	0	0.3	-1.94
Courses after graduation	80	0.29	0.46	0	0.92	-1.16
Adventure courses - team building.	80	0.11	0.32	0	2.41	3.84
Courses for mothers	80	0.02	0.16	0	5.97	34.08
Tourist courses – sea, mountains.	80	0.11	0.32	0	2.41	3.84
Individual courses	80	0.84	0.37	1	-1.8	1.24
Discussion clubs	80	0.09	0.28	0	2.87	6.29
Tailor made courses	80	0.48	0.5	0	0.1	-2.02
Mobility stays abroad.	80	0.22	0.42	0	1.29	-0.33
Translations interpretation	80	0.46	0.5	0	0.15	-2
Language audit	80	0.3	0.46	0	0.86	-1.28
International exams Certificate	80	0.64	0.48	1	-0.56	-1.71
Camps	80	0.31	0.47	0	0.79	-1.39
Online courses	80	0.62	0.49	1	-0.51	-1.76

The processed data shows that the language schools offer courses for the public, courses for companies, courses for children, individual courses, international exams and online courses (see figure 1). The least represented are courses for the unemployed and courses for mothers. Very few schools also offer discussion clubs and courses aimed at team building.

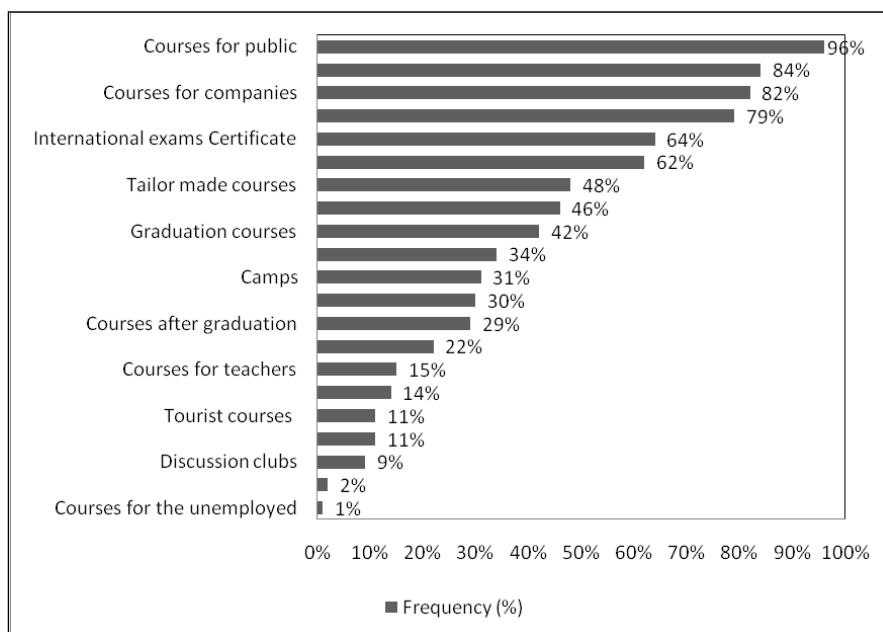


Figure 1

Frequency of representation of courses in the product range of language schools

4.1 Does the range of language schools offer depend on the size of the market?

In the first part of our research, it was examined whether there is a statistical dependence between the product concentration strategy and market size. The aim was to find out if there is a relationship between the breadth of the language school offer and the size of the market in which the language schools are located. For the above reasons, it was formulated hypothesis SH1 (see table 2).

Table 2

Range of language school products in the Czech Republic

Statistical hypothesis	P-value	Null hypothesis
SH1: There is a statistical relationship between the range of school offer and market size (NUTS3).	< 0.05	Rejected

To test this hypothesis, the Pearson correlation coefficient was used with results $r(78) = 0.38$, $p = 0.00054$. These results show that the p -value < 0.05. The results of this test lead us to reject the null hypothesis at the 5% significance level. The rho coefficient is 0.38 and indicates a moderately significant relationship.

Later in this paper, a moderately significant relationship between the size of the local market and the spectrum of language schools available will be presumed. In this context, it can be assumed that language schools in big cities have a wider range of products than schools in smaller cities. The research question then follows from the mentioned assumption, what type of strategy individual schools applies and whether the diversification strategy is really applied in the majority and/or whether the assumptions of the theory that large markets require a product concentration strategy are fulfilled in practice. Addition, the choice between diversification and specialization depends on the school's objectives, resources, market conditions, and the needs of the students they serve. In light of the absence of comparable studies, the ability to juxtapose the results with other empirical research is currently unattainable.

4.2 Is the offer of language schools for corporate clients customized?

In this question, the research was focused on the field of customization. The second research question concerns corporate education, which is, according to the conducted qualitative research (this research focused on the research of the market of language schools in the Czech Republic from the point of view of the top managers of these schools), the most profitable segment of the language school market. When creating the question, research team assumed that language schools must adapt the offer of courses to the requirements of companies. For these purposes, it was formulated hypothesis SH2 (see table 3).

Table 3
Statistical hypothesis testing results SH2

Statistical hypothesis	P-value	Null hypothesis
SH2: There is a statistical correlation between customized courses and corporate training.	< 0.05	Rejected

To test this hypothesis, Kendall's rank correlation tau was used with results $\tau=0.31$, $p = 0.0065$. These results show that the p-value < 0.05. The results of this test lead us to reject the null hypothesis at the 5% significance level. The tau coefficient is 0.31 and indicates a moderately significant relationship.

Later in this paper, a moderately significant relationship between the availability of tailor-made courses and courses designed for companies will be postulated. This implication raises the question of whether the offer of language schools is customized regardless of market segmentation. According to the research carried out, it can be assumed that most schools offer standard courses with clearly defined content, except for corporate clientele. For addition, it can be stated that some studies suggest that customization in corporate training can

indeed lead to better outcomes. One research team conducted a study in a corporate setting and found that customized training programs tailored to employees' specific roles and skill levels resulted in higher engagement and improved performance [26]. On the other hand, there might also be studies that show the opposite or more nuanced results. For example, it was found that while customization was appreciated by customers, an excessive level of customization could lead to increased costs and logistical challenges [17].

4.3 Do language schools apply a diversification strategy?

In the third research question, it was examined the tendency of language schools to diversify the range of products and services. It is known from theory that diversification strategies tend to be applied in small markets. The following hypothesis was also established in relation to the theoretical assumptions (see table 4).

Table 4
Statistical hypothesis testing results SH3

Statistical hypothesis	P-value	Null hypothesis
SH3: The most language schools (that means more than 50 %) have a wide range of products/services (that means more than eleven out of twenty-one offerings surveyed).	> 0.05	Not rejected

To test this hypothesis, 1-sample proportion test was used with results $\chi^2(1)=15.312$, $p = 1$, sample estimate p is 0.275. These results show that the p -value > 0.05 . The results of this test and the P value do not allow us to reject the null hypothesis at the 5% significance level (we have no sufficient evidence).

In the following, it will be assumed that less than 50% of language schools offer less than eleven of the 21 products/services that language schools offer on the market. Most schools offer approximately 10 and/or fewer products. It can be assumed that the range of products affects not only the size of the market, but also the size of the language school, which is an assumption that could be verified by some future research. Since similar studies have not yet been conducted, it is not possible to compare the results with other empirical research.

4.4 Are language schools focused on market opportunities outside the field of education?

In the fourth research question, it was investigated whether language schools only offer educational courses and/or language schools also focus on areas outside language education (such as translation, proofreading, etc.). Based on the market

analysis, it was found out that the most important player (Skřivánek, s.r.o.) in the Czech market has most revenues from translation and interpreting. This finding led us to verify the following hypothesis (see table 5).

Table 5
Statistical hypothesis testing results SH4

Statistical hypothesis	P-value	Null hypothesis
SH4: The most language schools (that means more than 50%) offer translation services.	> 0.05	Not rejected

To test this hypothesis, 1-sample proportion test was used with results $\chi^2(1) = 0.312$, $p = 0.712$, sample estimate p is 0.463. These results show that the p -value > 0.05. These results show that the p -value > 0.05. The results of this test and the P value do not allow us to reject the null hypothesis at the 5% significance level (we have no sufficient evidence). In the following, it will be assumed that less or as many as 50% of language schools offer translation/interpreting. In other words, most language schools do not focus on translations and proofreading. As part of this implication, it can also be assumed that the offer of language schools outside the field of education will depend on the size of the language school. Whether language schools realize that the field of translation and proofreading is one of the most profitable parts of the market could be tested again in some future research. Given the absence of analogous investigations, a comparison of the findings with other empirical studies is currently unfeasible.

The results of this study revealed some important findings regarding the tendencies of language schools in relation to the creation of service portfolios. The results of this study also gave us a general view of the services provided by language schools. As a rule, language schools focus on three key market segments. These segments correspond to three types of products that have the most abundant representatives in the service offer. These are services for the public (adults), children and youth, and corporate clients. The other courses offered are always variations on the basic offer of language schools. There is considerable similarity in the offer of individual language schools, especially regarding market segmentation. It can therefore be stated that the market of language schools is, from a general point of view, a market of standardized services.

Conclusions

This article's objective was to conduct a comparative evaluation of language school products and explore the interconnections among specific market and competitive factors influencing language school product strategies. The study encompassed a cohort of 80 language schools. It was found that language schools have a broad product portfolio, consisting of 21 products. Based on this finding, it was further investigated whether the language schools' offerings are influenced by selected factors, which were expressed in the following assumptions: (1)

The range of language school courses is affected by the size of the market (i.e., the larger the market, the greater the specialization of language courses); (2) Corporate learning is individualized; (3) Language schools pursue a strategy of diversification; (4) Language schools offer products outside the field of education. The results of the statistical analysis led to the following conclusions: (1) Market size affects the breadth of language school offerings and their differentiation. A moderately strong dependence was revealed, and hypothesis SH1 was confirmed; (2) The type of offer (i.e. courses for corporate clients) has an impact on course customization. A moderately strong dependence was revealed, while hypothesis SH2 was confirmed; (3) The majority of language schools lack an extensive array of products, while a minority of them opt for a diversification strategy. Hypothesis SH3 was rejected; (4) Most language schools miss out on opportunities beyond the realm of education. Hypothesis SH4 was rejected.

The above results of the statistical analysis illustrate the picture of the language school market in the Czech Republic in the context of the product offer of language schools. Based on these findings, it was revealed that language schools are developing tailor-made courses according to market size and tailoring their offerings to corporate clients. In most cases, language schools apply a targeted strategy and concentrate their efforts on the areas of individual and corporate education. However, it is necessary to add that these results are limited by the narrow sample of schools studied (80 schools out of an estimated 600), the type of research (exploratory research serves to assess the initial state of the market, not to generalize the results), and the location of the research (the language school market in the Czech Republic), the narrow research focus (the language education market only allows for sectoral analysis) and the primary data source (the data comes from an analysis of language school websites, which means that the analysis of the offer is entirely dependent on the relevance of the website of the research subject).

Future research should focus not only on the analysis of the value map of language schools (i.e. product strategy), but above all on the profiling of language school clients. This profiling can reveal hidden opportunities for language school business model innovations and show which product innovations are in line with changes in consumer preferences.

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