



AN IRISH EDUCATION GROUP • A REPORT FOR EUROPEAN PARTNER INSTITUTES • EDITION 2026

State of TEFL in Europe.

*From TEFLinstitute.com — the market, the opportunity, and a partnership offer
for forward-looking European institutes, featuring our 180-hour, Ofqual-regulated, EQF-aligned Level 5 Diploma.*

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EDITION

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ACCREDITATION

Ofqual • DEAC/AQC • Highfield • EQF-aligned

Europe is the fastest-growing English learning economy in the world.

English remains the EU's most-spoken second language (35.5% of the population) and the second-largest segment of the global \$122.7B ELT market by 2030.

€7.83B

Europe ELL market value

2025, up 5.12% YoY

15.2%

Digital ELL CAGR

Europe 2022–2030

35.5%

EU population speaks English

#1 second language, EC 2024 data

80%+

EU students studying English

across all education levels

Three reasons to add the Level 5 Diploma to your curriculum in 2026.

THE EUROPE OPPORTUNITY

\$5.17B *today, projected to reach* **\$11.88B** *by 2030.*

15.1%

CAGR 2025-30

01

A booming European market.

Europe's online ELL market is growing at 15.1% CAGR — more than 2x the global average. Demand is driven by EU multilingualism policy, corporate training, and 80%+ of EU students studying English.

02

Premium qualification, premium pricing power.

A 180-hour Level 5 Diploma is the European preferred standard above the 120-hour baseline. Holders command €200–€500/month higher pay across Spain, Italy, Germany, France, Czech Republic, Portugal, and Poland.

03

An Irish-based partner, government regulated and EQF-aligned.

Built and delivered by TEFLinstitute.com from Ireland. Ofqual-regulated (UK Government), DEAC/AQC-approved (US-recognised), Highfield-awarded, and aligned with the EQF (Level 5). Equivalent in level to CELTA. Trusted by 148,000+ learners worldwide.

Where the demand sits, country by country.

Eight focus markets. Each requires a TEFL certification — five mandate it by law. A 180-hour Level 5 Diploma is the consistent premium tier across all of them.

Country	TEFL Required	Demand 2026	Salary (€/mo)	Level 5 Premium
Spain	Yes — 120hr min	Very high · Auxiliares 2,000+/yr	700–1,600	+€200–€500
Italy	Recommended	Very high · year-round hiring	600–1,400	+€200–€500
Germany	Yes — 120hr min	High · business English boom	1,200–2,500	+€200–€500
France	Recommended	High · TAPIF 1,000+/yr	900–1,800	+€200–€500
Czech Republic	Yes — 120hr min	Very high · fastest growing	900–1,400	+€200–€500
Portugal	Yes — 120hr min	High · year-round	800–1,300	+€200–€500
Poland	Yes — 120hr min	Very high · thousands of roles	850–1,500	+€200–€500
Hungary	Recommended	Steady	700–1,200	+€200–€500

120 hours gets a job. 180 hours gets a career.

Across Europe, the 120-hour TEFL is the legal floor. The 180-hour Level 5 Diploma is what employers, language schools, and international institutions actually pay more for — sitting on the same Ofqual-regulated framework as a CELTA and aligned with the European Qualifications Framework (EQF Level 5).

120-HOUR TEFL

The baseline.

- Legal minimum in 5 of 8 EU markets
- Entry-level salaries: €600–€1,200/month
- Saturated supply — high competition
- Limited career progression

180-HOUR LEVEL 5 DIPLOMA

The premium tier.

180 GLH 38 credits 382 TQT EQF Level 5

- Ofqual-regulated · DEAC/AQC-approved · Highfield-awarded
- EQF-aligned (Level 5) · CELTA-equivalent framework
- +€200–€500/month vs. 120hr holders
- Lifetime qualification; 6 months access

A qualification stack that opens employer doors — and inspector files.

Three independent regulators, one EU framework — delivered by an Irish-based provider, ready for your institute to offer.

UK GOVERNMENT

Ofqual

Regulated under the UK's RQF at Level 5 — 38 credits, 180 guided learning hours, and 382 total qualification time hours. The mark of legal recognition employers and ministries trust.

[View on Ofqual register →](#)

UNITED STATES

DEAC · AQC

Approved Quality Curriculum (AQC) status from the Distance Education Accrediting Commission (DEAC) — a US Department of Education-recognised body. The US benchmark for distance-learning quality.

[View AQC provider profile →](#)

AWARDING BODY

Highfield

Awarded by Highfield Qualifications through Approved Centre #21335 — one of the UK's largest awarding organisations, providing third-party quality assurance on assessment and delivery.

[Visit Highfield Qualifications →](#)

EUROPEAN FRAMEWORK

EQF

Aligned to the European Qualifications Framework at Level 5 — the EU's reference framework that makes qualifications readable and portable across all 27 Member States and beyond.

[About the EQF →](#)



Plug into your existing model.

*A turn-key, EQF-aligned Level 5 module — built and delivered from Ireland by TEFLinstitute.com —
that your institute can offer under co-branded terms, without building accreditation infrastructure from scratch.*

Two ways your institute can integrate the Level 5.

Pick the model that fits your delivery infrastructure, marketing reach, and revenue priorities.

MODEL A

Co-branded curriculum

Your institute markets and enrolls students. We deliver assessment, certification, and Ofqual/DEAC/EQF-aligned compliance under a co-branded certificate.

BEST FOR

Private language academies • EdTech platforms • Corporate training providers

- Lowest operational lift
- Joint marketing assets included
- Revenue share per enrolment

MODEL B

Curriculum add-on

The Level 5 Diploma offered as a graduate or career pathway alongside your existing TESOL, language, or education programmes.

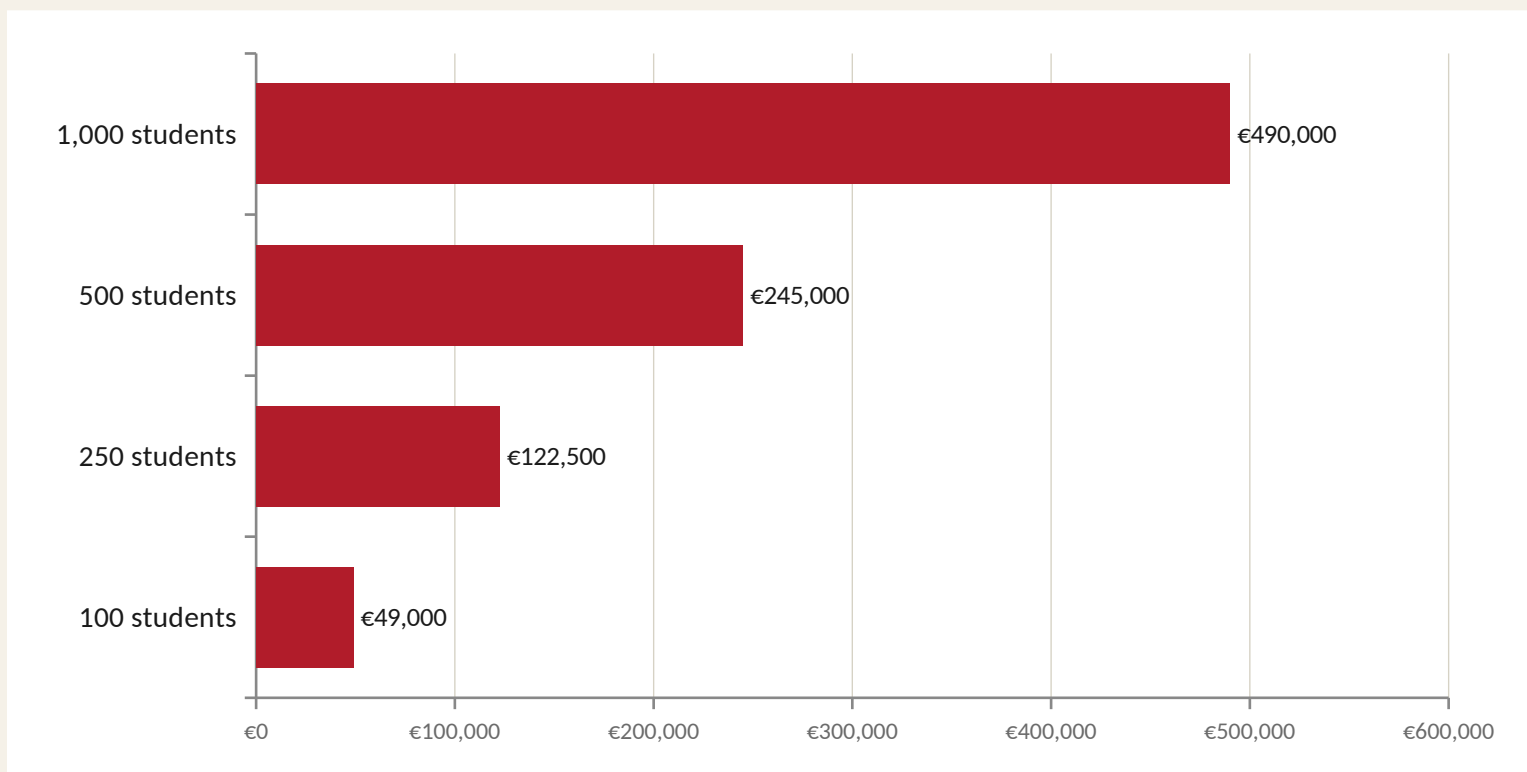
BEST FOR

Universities & colleges • Government & state education bodies • International schools

- Stackable credit (subject to local rules)
- Plugs into existing degree pathways
- Discounted bulk enrolment terms

What 250 enrolments a year looks like.

Illustrative partner economics on a co-branded delivery model. Adjust to your channel scale.



ASSUMPTIONS

Course list price	€699
Partner share	70%
Per-enrolment revenue	€490
Marketing support	Included
Tutor support	Included
Year-1 break-even	~30 students

A real partner. A €100,000-a-year add-on.

How one European language partner is generating six-figure annual revenue by bolting our Level 5 Diploma onto their existing 20-hour in-class TEFL course.

THE RESULT

€100,000+ *annual revenue, from one bolt-on.*

LEVEL 5

Bolt-on

THE SETUP

A 20-hour in-class TEFL course

The partner already runs a short, in-class introductory TEFL programme. Students complete it, then are offered the option to upgrade to our 180-hour Ofqual-regulated Level 5 Diploma online — co-branded, fully delivered by us.

THE ECONOMICS

~205 upgrades a year

At a €699 list price and 70% partner share, ~205 upgraded students a year generate just over €100,000 in partner revenue — without the partner building accreditation, writing curriculum, or hiring tutors.

THE LIFT

Zero new infrastructure

The 20-hour course stays exactly as it is. We handle assessment, certification, Ofqual/DEAC compliance, tutor support, and student platform. The partner adds a single upgrade page and a closing pitch.

What your students get when they graduate.

An Irish-issued, EQF-aligned qualification recognised in 80+ countries, validated by employers, and engineered for European hiring markets.

180 GLH

38 credits • 382 TQT

180 guided learning hours, 38 credits and 382 total qualification time hours at EQF/RQF Level 5 — the CELTA-equivalent framework.

148K+

Learners trained

A network of teachers across 80+ countries that students join on graduation day.

+€500

Monthly salary uplift

Average premium for Level 5 graduates over 120-hour TEFL teachers across Europe.

4.9/5

Trustpilot rating

From 3,000+ verified TEFLinstitute.com reviews — among the highest in the sector.

Your students inherit our full ecosystem.

Four institutional assets your partner students access from day one — beyond the qualification itself.

AI PLATFORM

TEFL.ai

Free AI lesson-plan generator, materials adaptor, IELTS band estimators, CV builder, country eligibility checker, and global jobs board.

WELLBEING

Wellness Programme

The TEFL Wellbeing Framework — five pillars (rest, movement, nutrition, connection, purpose) with mindfulness and yoga modules for educators.

CAREERS

Employability Department

CV and cover letter reviews, live mock interview sessions, alumni Discord, and direct placement support across the TEFLinstitute.com jobs board.

IRISH PARTNERSHIP

Gaisce — President's Award

Official Irish state partnership: TEFL hours count toward Bronze and Silver Gaisce, Ireland's national youth development award presented by the President of Ireland, for partner students aged 16–25.

From signed MoU to first graduating cohort in 90 days.

We handle the regulatory and curriculum lift. Your institute focuses on enrolment.

A DEDICATED PERSONAL ACCOUNT MANAGER *guides every step — from MoU to first graduating cohort.*

WEEK 1 - 2

WEEK 3 - 5

WEEK 6 - 8

WEEK 9 - 12

Discovery & MoU

Your dedicated account manager scopes the partnership, selects the model (A or B), agrees commercial terms, and signs the MoU.

Setup & branding

Co-branded course shell, LMS integration, marketing asset pack delivered, tutor onboarding — managed end-to-end on your behalf.

Soft launch

First cohort enrolled, joint launch announcement, dedicated escalation channel to your account manager active.

First graduates

Cohort completes assessment, Ofqual/DEAC/Highfield certification issued, alumni feed into your placement network.

Who this is built for.

From our base in Ireland, we partner with institutes that already serve aspiring or working teachers and want to add a regulated, EQF-aligned, internationally portable credential to their offer.

Universities & colleges

Add a graduate-employability credential to TESOL, modern languages, or education degrees.

Private language academies

Diversify revenue by training the teachers, not just the students.

International schools

Upskill in-house faculty and unlock new hiring pipelines through accredited training.

Corporate training providers

Add an Ofqual-regulated credential to your B2B Business English portfolio.

EdTech platforms

License a regulated diploma to add credibility and price-tier headroom to existing courses.

Embassies & cultural institutes

Offer a recognised qualification to local educators as part of cultural diplomacy programmes.

“

An Irish education group founded in 2017, trusted by 148,000+ learners with a 4.9/5 rating — built on Ofqual, DEAC, AQC, Highfield, and EQF-aligned accreditation, not marketing.”

THE TEFL INSTITUTE • TRUSTED BY 148,000+ LEARNERS WORLDWIDE

OFQUAL

UK Government Regulated

DEAC

US-recognised distance accreditor

HIGHFIELD

Approved Centre #21335

EQF

European Qualifications Framework

Let's explore the partnership.

A 30-minute call to scope fit, choose a model, and walk through your launch timeline.

DISCOVERY CALL

Book a 30-minute scoping session

partnerships@theteflinstitute.com

PROGRAMME PROSPECTUS

Request the full partner pack

theteflinstitute.com/partner

WEBSITE

Browse the Level 5 course detail

teflinstitute.com/course/level-5